



OSHPD e-Services Portal

Public User Guide

Version Number: 8.0

Section 1 – System Overview

1 Introduction

Welcome to OSHPD Electronic Services Portal Client Access (eCA) User Guide

This section of the user guide provides an overview of the OSHPD Electronic Services Portal Client Access program, also referred to as eCA.



Throughout each of these user guides you will see screenshots of the various pages and sections you will use to navigate and enter application information. Help is available throughout the application.

Wherever you see a help icon,  click on the question mark to open help and instructions for that item in the application.

2 eCA System Overview

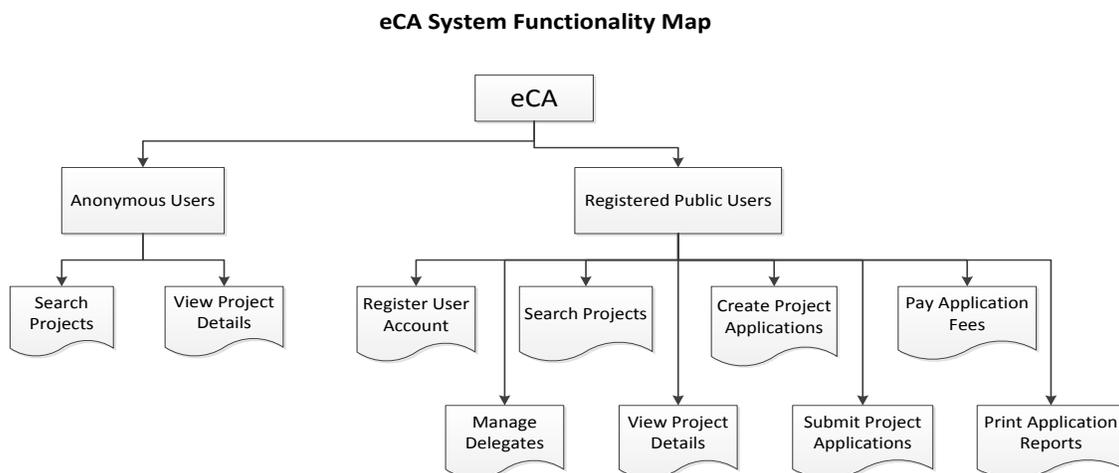
eCA is an online system that allows the facility representatives and licensed professionals to submit various applications for projects directly to OSHPD. eCA enables public users to register for an online account, manage their accounts, create applications for projects and other records, submit project applications directly to OSHPD, pay application fees, and track the application status.

eCA is accessible to all public users via the internet at <https://eserv.oshpd.ca.gov/CitizenAccess/>. To perform the ‘core functions’, users must register for and obtain a public user account. Once project application is submitted to OSHPD via eCA, the information is immediately available to OSHPD and can be viewed (only) by the public.

2.1 eCA Functionality

Public users can navigate the eCA system simply by following the various links in the system and clicking on specific buttons to perform various tasks. eCA consists of two main functional areas: “anonymous users” and “registered public users”. Figure 1 below illustrates the main functionalities in each group.

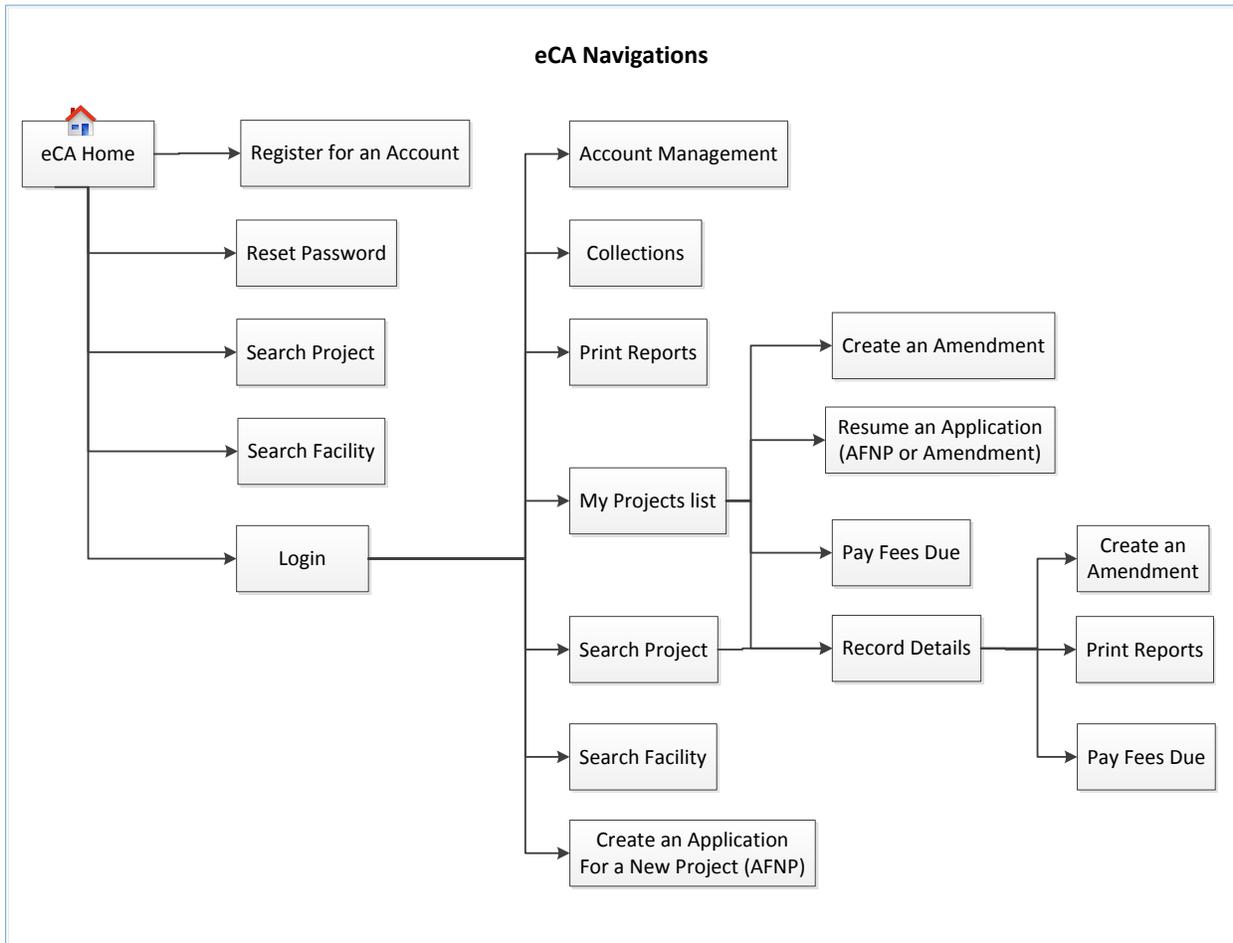
Figure 2.1 - eCA System Functionality Map



2.2 eCA Navigation

Figure 2 below illustrates the available web pages in the eCA system and the navigation path users must follow. User must log in eCA to create and submit project applications.

Figure 1.2 - eCA Navigations



2.3 eCA Icons

Table 1 below lists the common icons used in eCA.

Table 2.3 - eCA Icons

Icon	Description
	Search a record in eCA or in a list
	Click on the icon to display help instructions
	Watermark instructions are displayed in the data entry field. When user puts the cursor in the field, the watermark instructions are replaced by the data user enters.
	Warns the user that there are errors in data entry fields on the form which prevents the page from being saved. The error message appears both on the top of the page and next to the data entry field where there is an error.
	Hyperlinks are displayed with blue-colored text .
	Steps in application process, also referred to as “bread Crumbs”, that show you where you are in the process. <ul style="list-style-type: none"> • Blue icon indicates the current step. • Yellow icon indicates the steps that remain to be completed. • White icon with underlined text indicates the completed step(s) which are also available for editing.
	Click on the calendar picker to display the current month. Click any date to populate the date field in the proper format.
	Click on the Save pending submittal button to save the application in progress before submittal to OSHPD. eCA generates a temporary project record for the application.
	Click on Continue Application button to proceed to the next step of the application process.
	Click on the Clear button to clear data that has been entered but not saved on the screen.

<p>Cancel Discard Changes</p>	<p>Click on the Cancel or Discard Changes link to cancel current task being performed on the screen.</p>
<p>Submit Save and Close</p>	<p>Click on the Submit or Save and Close button to save the data entered in the current section of the form.</p>
<p style="text-align: center;">*</p>	<p>Data entry is required for the field.</p>
<p>Windows Internet Explorer</p> <p>i Are you sure you want to leave this page?</p> <p>Message from webpage:</p> <p>Your information has not been saved.</p> <p>→ Leave this page</p> <p>→ Stay on this page</p>	<p>Alerts the user that they are leaving the current page.</p>

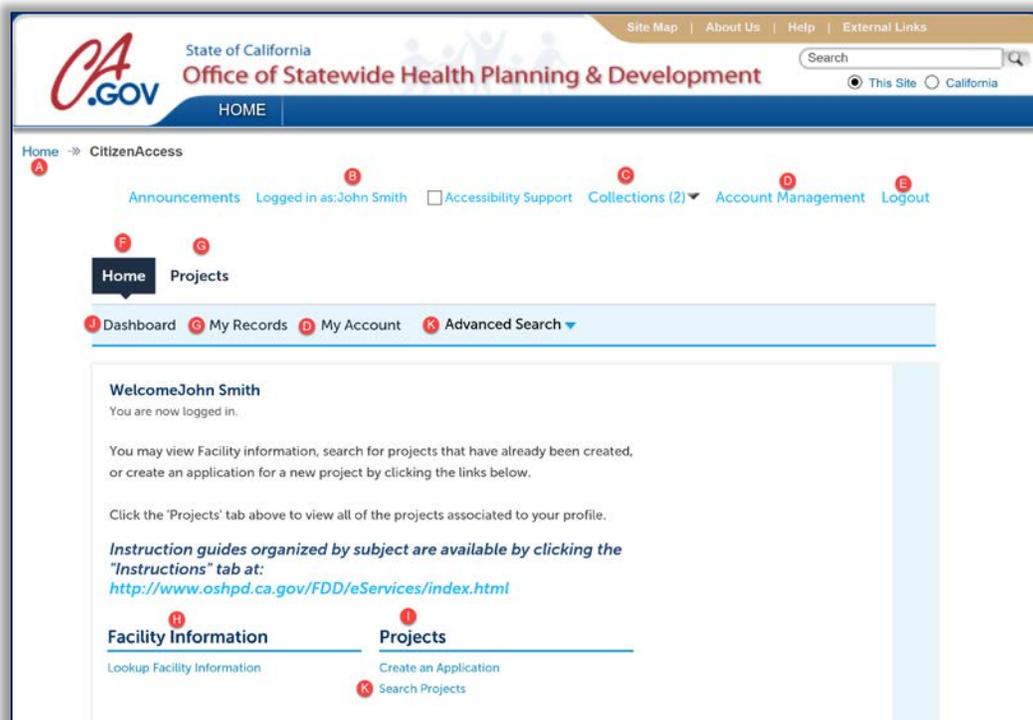
3 eCA System Orientation

This section provides an overview of the main page and basic system functions and features.

3.1 eCA Home Tab

The home tab is the main page for all user activity. It is the page presented to the users after they log into eCA.

Figure 3.1 - eCA Home Tab



The home tab offers the following functionality and features.

- A. **Breadcrumbs** – The breadcrumbs show users “where they are” in the system. Users can click the “Home” link to return to the Home tab. Note: if the user is in a project application, clicking the “Home” link does NOT save the work in process.
- B. **Logged in User** – eCA shows the logged in user name.
- C. **Collections** – This link shows how many collections the user has created and provides a link to the collections. Collections are a convenient and easy way to group projects you regularly work on – similar to a My Favorites page.
- D. **Account Management/My Account** – This link opens the user Account Management features described in Section 4, such as Delegation, License Association and Password maintenance.
- E. **Logout** – This link logs the user out of eCA.
- F. **Home Tab** – Always visible on the main page, clicking on this tab takes the user back to the Home screen.
- G. **Projects Tab/My Records Link** – This tab will list all projects associated with the user account:
 - a. Projects/Records created by the user
 - b. Projects/Records associated with the user’s professional license
 - c. Projects/Records at the facilities associated to the user
 - d. Projects/Records associated to the user by delegation
- H. **Facility Information** – This link below opens the facility search page.
- I. **Projects** – This links below allow the user to begin the application process for New Project and to conduct a general search.
- J. **Dashboard** – This link displays the User’s personalized dashboard which includes a quick display of Collections and all projects that are in-progress for easy selection and completion.
- K. **Search/Advanced Search** – This link or selection opens the Projects tab to allow for searching by project/record number, by Facility, by License Number, etc.

3.1.1 Collections

Collections are a convenient way to access projects that you work on more often than others and to sort your projects into logical categories. Think of it as a “My Favorites” page or a “Quicklist”. Add projects you work on frequently. Remove them when you’re done. Create categories that make sense to you, like projects at Facility A, projects at Facility B, etc. You can add projects to the Collections from the projects list as well as the search result.



3.1.1.1 Add Projects to Collections

Using any search results or from the Projects tab, users may add projects and records to their collections by checking the box adjacent to the record and then click on the “Add to Collection” hyperlink. The user will be able to create a new Collection or add to an existing Collection. See Figure 6.

Figure 3.1.1.1 - Add to, or Create, Collections

Projects

Showing 61-70 of 100+ | [Download results](#) | [Add to collection](#)

<input type="checkbox"/>	Date	Project Number	Project Type	Project Name	Status	Related	Action
<input type="checkbox"/>	08/07/2015	S150624-19-00-BPT01	Application for Building Permit	Track Mounted Supply Rack Install	Closed	2	
<input checked="" type="checkbox"/>	08/03/2015	S152042-19-00	Application for New Project	RRU-ED Admin Relocation	Pending Construction Start	2	Pay Fees Amend
<input type="checkbox"/>	06/22/2015	P-2013-00243-ACD0005	Post Approval Document	RRU- UCLA RRUMC Clinical Laboratory-Equipment Upgrade Project.	Approved	7	
<input checked="" type="checkbox"/>	06/18/2015	S151641-19-00	Application for New Project	RR - Kitchen Time Clocks	Closed	2	
<input type="checkbox"/>	06/16/2015	S132854-19-00-ACD0002	Post Approval Document	RRU-LA - Sterile Processing Sonic Washer installation	Approved	5	

3.1.1.2 The Collections List

To open and view collections, click on the “Collections” hyperlink at the top of the screen.

Figure 3.1.1.2(1) - Open Collections

[Announcements](#) | [Logged in as: John Smith](#) | [Collections \(2\) ▼](#) | [Account Management](#) | [Logout](#)

Collections

Home
Projects

[Dashboard](#) | [My Records](#) | [My Account](#) | [Advanced Search ▼](#)

Collections

This is a list of your collections. To manage a collection, click the link next to the collection name.

Showing 1-2 of 2

Date Modified	Name	Description	Number of Records	
10/30/2016	UC Irvine	UC Irvine Medical Center	5	Delete
10/30/2016	UCSD	UC San Diego Medical Center	2	Delete

In the example above, this user shows two collections in their Collections list. Users can add or delete projects/records to the collections, or completely delete the collections, without deleting or affecting the underlying projects. Users can open the collections and work the projects as they would from the main Project Tab. See Figure 8.

Figure 3.1.1.2(2) - Sample Collection "My Projects"

UC Irvine
 UC Irvine Medical Center
 Total Records: 6 (6 Projects)
 Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)
 Fees Summary: \$1,582.00 Paid, \$0.00 Due

[Rename Collection](#) [Delete Collection](#)

Projects
[Move to...](#) | [Copy to...](#) | [Remove](#)
 Showing 1-6 of 6 | [Download results](#)

<input type="checkbox"/>	Date	Project Number	Project Type	Project Name	Status	Related Records	Action
<input type="checkbox"/>	10/05/2016	S162543-30-00	Application for New Project	2880_B1, DH 76/78 Medication Rooms, Add Outlets	Open	0	Amendr
<input type="checkbox"/>	10/03/2016	S162521-30-00	Application for New Project	2981_B1A, ED Registration Consolidation	Pending Construction Start	2	Amendr
<input type="checkbox"/>	09/29/2016	S162495-30-00	Application for New Project	2954_B1, 2nd FL, Room 2423, Work Flow Modification	Pending Construction Start	3	Amendr
<input type="checkbox"/>	09/29/2016	S162496-30-00	Application for New Project	2949_B1, 5th Fl, Rm 5600, Change of Use to EMU Monitoring Room	Pending Construction Start	2	Amendr
<input type="checkbox"/>	08/25/2016	SER-2016-00207	App for Seismic Eval Report	Adding Building to Facility	Active - Plan Review	1	

3.1.2 Reports

eCA provides multiple ways to run reports. The easiest way to generate a report is from the project summary because eCA passes information from the project summary to the report. The other way to generate a report is from the reports hyperlink on the main page. The reports hyperlink allows users to generate a Receipt for the Application Fee, a Preliminary Invoice (for projects which opt to "pay later"), and the Project Application Summary. With the reports link it is necessary to provide the exact project number or receipt number in order to generate the report.

Figure 3.1.2 - Reports

[Announcements](#)
 Logged in as: John Smith
 Collections (2) ▼
 Reports (6) ▼
 Account Management
 Logout

Reports (6):

- [AMC and PAD](#)
- [Invoice Aging Report](#)
- [Preliminary Invoice](#)
- [Professionals by Project](#)
- [Project Application Summary](#)
- [eCA Payment Receipt](#)

3.1.2.1 Project Summary Sheet/Transmittal

The project summary sheet provides users with a printable summary of the project. This report should be included as the Transmittal for all “enclosures” submitted to OSHPD, whether they are submitted to the office or to the field.

Figure 3.1.2.1(1) - Project Summary Sheet - Generate from Project Summary

Step 7: Confirmation

Your application has been successfully submitted.
Please print your record and retain a copy for your records.

Thank you for using eClient Access to submit your application for post-approval document.
Your Post-Approval Document Number is S162557-37-00-ACD0001.

You will need this number to check the status of your project. Please print a copy for your records.

Print/View Project

Print/View Summary

Figure 3.1.2.1(2) - Sample Project Summary Report

3.1.2.2 Print Receipt

If the user pays by credit card, the user may print the receipt at the time of payment or later, provided the user saves the receipt number.

Figure 2.1.2.2(1) - Print Receipt

Confirmation

You have paid a fee associated to this Record.
Please print a copy of this receipt and retain a copy your records.

Thank you for using eClient Access to process your payment.
Your Record Number is S162557-37-00-ACD0001.

You will need this number to check the status of your project. Please print a copy for your records.

Print/View Project

Print/View Receipt

Print/View Summary

OFFICE OF STATEWIDE HEALTH PLANNING AND DEVELOPMENT
FACILITIES DEVELOPMENT DIVISION

Project Number: S162557-37-00-ACD0001
Project Type: Post Approval Document
Parent Project Number: S162557-37-00
Facility: 11659 - UCSD La Jolla, Jolin MSally D Thornton Hosp & Sulpizio Cardiovascular Ctr

Project Description: mc16088.Jacobs Sink installation Rm 1.1-483
To remove two pieces of equipment and install utility sink in soiled work room 1.1-483

Applicant Tracking No: ACD 91
Submittal Type: Amended Construction Document
Reason for Change: Reason for change.
Scope of Change: Scope of change.

Description of Proposal:

Primary Professional: Ericosis M Lewis, (619) 725-0980, testluges@oshsdpd.ca.gov
Primary Contact: Teresa Fincoo

Cost Type	Cost Date	Construction Cost	Fixed Equipment Cost	Total Cost	Cost of Insuring	Reason
Estimated	10/30/2016	\$0.00	\$0.00	\$0.00	\$0.00	

Enclosures:

# of Copies	Enclosure Type	Description	Date Sent	Method of Transmittal	Courier Name	Backcheck	Attached

Please include this Project Application Summary form with your construction documents when submitting to OSHPD. This Project Application Summary form replaces the paper application; it is not necessary to include the paper application when project applications are created using eClient Access.

S162557-37-00-ACD0001

Figure 3.3.2.2(2) - Sample Receipt

REMIT TO:															
UCSD La Jolla, John M/Sally B Thornton Hosp & Sulpizio Cardiovascular Ctr 9300 Campus Point Dr La Jolla, CA 92037	Office of Statewide Health Planning and Development Accounting Office 400 R Street, Ste 359 Sacramento, CA 95811-6213														
Project related questions contact - Facilities Development Division (916) 440-8300 or (213) 897-0166 Billing related questions contact - Accounting Services (916) 326-3236, Fax (916) 322-2527															
Facility Name: UCSD La Jolla, John M/Sally B Thornton Hosp & Sulpizio Cardiovascular Ctr	Facility Number: 11659														
App Tracking:	Project Number: S162557-37-00- ACD0001														
Scope of Change: Scope of change.	Parent Number: S162557-37-00														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Fee Item Description</th> <th style="width: 15%;">Invoice #/Date</th> <th style="width: 15%;">Amount</th> <th style="width: 10%;">Amount Due</th> </tr> </thead> <tbody> <tr> <td>Application Fee</td> <td>190770 - 10/30/16</td> <td>\$250.00</td> <td>\$0.00</td> </tr> </tbody> </table>				Fee Item Description	Invoice #/Date	Amount	Amount Due	Application Fee	190770 - 10/30/16	\$250.00	\$0.00				
Fee Item Description	Invoice #/Date	Amount	Amount Due												
Application Fee	190770 - 10/30/16	\$250.00	\$0.00												
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Transaction</th> <th style="width: 15%;">Receipt Nbr</th> <th style="width: 15%;">Payment Method</th> <th style="width: 15%;">Payment Ref#</th> <th style="width: 15%;">Date</th> <th style="width: 20%;">Amount</th> </tr> </thead> <tbody> <tr> <td>Receipt</td> <td>124961</td> <td>Credit Card</td> <td></td> <td>10/30/2016</td> <td>\$250.00</td> </tr> </tbody> </table>				Transaction	Receipt Nbr	Payment Method	Payment Ref#	Date	Amount	Receipt	124961	Credit Card		10/30/2016	\$250.00
Transaction	Receipt Nbr	Payment Method	Payment Ref#	Date	Amount										
Receipt	124961	Credit Card		10/30/2016	\$250.00										
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">PLEASE PAY THIS AMOUNT -----></td> <td style="width: 20%;">BALANCE</td> <td style="width: 10%; text-align: right;">\$0.00</td> </tr> </table>			PLEASE PAY THIS AMOUNT ----->	BALANCE	\$0.00										
PLEASE PAY THIS AMOUNT ----->	BALANCE	\$0.00													

3.1.2.3 Preliminary Invoice

The preliminary invoice report is for users who opt for the “pay later” option when creating the project. The pay later option enables users to submit a project without generating an invoice from OSHPD (the traditional payment method) or paying immediately with a credit card. Users who select “pay later” can print the preliminary invoice and have another registered user, who is authorized to pay with a credit card, use the information on the preliminary invoice to find the project and make the payment. If the application fee is not paid within 10 calendar days, OSHPD will automatically issue an invoice to the facility’s billing contact.

Figure 3.1.2.3 - Sample Preliminary Invoice

FACILITY:		REMIT TO:	
UCSD La Jolla, John M/Sally B Thornton Hosp & Sulpizio Cardiovascular Ctr 9300 Campus Point Dr La Jolla, CA 92037		Office of Statewide Health Planning and Development Accounting Office 400 R Street, Ste 359 Sacramento, CA 95811-6213	
Project related questions contact - Facilities Development Division (916) 440-8300 or (213) 897-0166 Billing related questions contact - Accounting Services (916) 326-3236, Fax (916) 322-2527			
Facility Name:	UCSD La Jolla, John M/Sally B Thornton Hosp & Sulpizio Cardiovascular Ctr	Facility #:	11659
Project Description:	5020 MCLJ TH Emergency Dpt. & Radiology Intake Ctr	Project #:	S162640-37-00
App Tracking #:		Parent #:	
Scope of Change:			
Construction Cost:	\$9,750,000.00	Fixed Equipment Cost:	\$2,180,000.00
		Radiological Cost:	\$0.00
Fee Item Description	Date	Amount	Amount Due
Application Fee	10/19/2016	\$250.00	\$250.00
Please log in to https://eserv.oshpd.ca.gov/CitizenAccess/ to submit your credit card payment online. You can submit the invoice number and your credit card information to our secure email at ePayments@oshpd.ca.gov			
PLEASE PAY THIS AMOUNT ----->		BALANCE	\$250.00

3.1.3 Account Management

User Account Management is detailed in Section 4.

Announcements Logged in as:John Smith Collections (2) Reports (6) **Account Management** Logout

3.1.4 Logout

Logout logs the user out of eCA so another user may log in. It is a recommended practice to log out when users conclude their session.

Announcements Logged in as:John Smith Collections (2) Reports (6) Account Management **Logout**

3.1.5 Home Tab – Facility Information

The Lookup Facility Information hyperlink on the Home tab enables logged-in users to look up facilities by facility number, county code, geographic region, and responsible region (i.e. OSHPD Region).

Figure 3.1.5(1) - Facility Information

Welcome John Smith
 You are now logged in.

You may view Facility information, search for projects that have already been created, or create an application for a new project by clicking the links below.

Click the 'Projects' tab above to view all of the projects associated to your profile.

Instruction guides organized by subject are available by clicking the "Instructions" tab at:
<http://www.oshpd.ca.gov/FDD/eServices/index.html>

Facility Information

[Lookup Facility Information](#)

Projects

[Create an Application](#)

[Search Projects](#)

eCA uses "Parcel" and "Facility" interchangeably.

Figure 3.1.5(2) - Facility Look up Information

Look up Facility Information

Enter information below to look up Facility information from the eServices Portal database. Property information can be searched for by entering any of the following information:

Look Up by Parcel Information

Facility Number:

Responsible Region:

Type of Facility:

Geographic Region:

County Code:

RCO: ACO: DSE: Field FLSO: Closure PT:

Senior Architect: Plan Review PT:

[Look Up](#) [Clear](#)

The following screenshot shows the results for a facility search. The screen shows general information about the facility.

Figure 3.1.5(3) - Facility Search Results

1 results found matching lookup criteria

Click any of the results below to view more details.

Showing 1-1 of 1 | [Download results](#)

Facility Number	Facility Status	Action
11659	Enabled	Retrieve Address & Owner Info

Facility Address

Showing 1-1 of 1 | [Download results](#)

Address
9300 Campus Point Dr, La Jolla CA 92037

Facility Owner

Showing 1-1 of 1 | [Download results](#)

Name	Address
11659 - THE REGENTS OF THE UNIVERSITY OF CALIFORNIA	1111 FRANKLIN STREET, 12TH FLOOR OAKLAND CA 94619

Figure 3.1.6 – Projects Links

3.1.6 Home Tab – Projects

The Projects links on the Home Tab allows the user to either create a new application for a new project (AFNP) (Section 5) or to search for projects/records that have already created (Section 6). The Search Projects hyperlink takes users to the Projects Tab.

Welcome John Smith
You are now logged in.

You may view Facility information, search for projects that have already been created, or create an application for a new project by clicking the links below.

Click the 'Projects' tab above to view all of the projects associated to your profile.

Instruction guides organized by subject are available by clicking the "Instructions" tab at:
<http://www.oshpd.ca.gov/FDD/eServices/index.html>

Facility Information	Projects
Lookup Facility Information	Create an Application Search Projects

3.1.6.1 Create and an Application

The Create an Application link takes users to create a new Application for New Project (AFNP). See Section 5 for more information

3.2 Projects Tab

The Projects Tab is the main workspace for most users. It presents users with all projects associated with their user account. Associations are created by:

- License – See user account management.
- Delegation – See user account management.
- Association with a Facility – Established by submitting the OSH-FD-310 - *eCA Letter of Authorization*.
- Created – Projects created by the user.

Figure 3.2 - Project Tab

<input type="checkbox"/>	Date	Project Number	Project Type	Project Name	Status	Related	Action
<input type="checkbox"/>	10/30/2016	S162557-37-00-ACD0001	Post Approval Document	mc16088 Jacobs Sink installation Rm LL-483	Open	3	
<input type="checkbox"/>	10/21/2016	16TMP-015585	Post Approval Document			0	Resume Applica
<input type="checkbox"/>	10/20/2016	S162521-30-00-BPT01	Application for Building Permit	2981_B1A, ED Registration Consolidation	Approved	2	
<input type="checkbox"/>	10/20/2016	S162496-30-00-BPT01	Application for Building Permit	2949_B1, 5th Fl, Rm 5600, Change of Use to EMU Monitoring Room	Approved	2	
<input type="checkbox"/>	10/20/2016	S162495-30-00-BPT01	Application for Building Permit	2954_B1, 2nd FL, Room 2423, Work Flow Modification	Approved	3	

3.2.1.1 Search Projects – General Search

Users can search for any projects in the eCA system via the search page. See Figure 20.

To obtain the best search results, limit the number of fields in the search. For instance, to search for a project, enter only the project number and leave the Facility and State License Number fields empty. The search results will return all records with that project number, including AMCs, PADs and BPs – whether those records are open or closed.

Search results can be limited by filtering the search using the Project Type drop-down list. Entering the project number and selecting ‘Application for New Project’ in the drop-down list will result in only the parent project record. If the project is an Incremental project, select ‘Incremental – New Building – Master’ from the drop-down list.

If your search returns ‘No Results’, try removing the ‘Start Date’ filter and searching again.

Figure 3.2.1.1 - Project Search - General Search

Search for Projects

Enter information below to search the eServices Portal database. Project information can be searched for by entering any of the following information:

- Facility ID Number
- OSHPD Project Number
- Professional Licensee Information

Use the dropdown menu to filter the search results by Project Type.

General Search

General Search ▼

Search my records only

Facility ID Number:

Project Number:

Project Type:

--Select-- ▼

License Type:

--Select-- ▼

State License Number:

Start Date: ?

10/31/2014 📅

End Date: ?

10/30/2 📅

[Do not include Additional Criteria](#)

INCREMENTAL MASTER

Seismic Compliance Construction Project: Yes No

PLAN REVIEW

Seismic Compliance Construction Project: Yes No

Search

Clear

3.2.1.2 Search Projects –Search by Licensed Professional

Users may also search for projects by license professional information. This search is flexible. It allows users to search by license type and/or license number. When searching for a license number, eCA allows for the entry of partial license numbers (e.g. “C223” instead of “C22341”). It also allows wildcard searches (e.g. “C223%”).

Figure 3.2.1.2 - Project Search - Licensed Professional

Search for Projects

Enter information below to search the eServices Portal database. Project information can be searched for by entering any of the following information:

- Facility ID Number
- OSHPD Project Number
- Professional Licensee Information

Use the dropdown menu to filter the search results by Project Type.

Search by Licensed Professional Information

License Type: State License Number:

--Select-- ▾

Search by Licensed Professional Information ▾

Search my records only

Search

Clear