User Guide for Projects with "PTS" Numbers

DEVELOPMENT SERVICES

Development Services

Overview

A *hybrid* system has been developed to use OpenDSD for the electronic submittal of project documents and our current Project Tracking System for performing reviews and inspections. Some of the language on the website is specific to the Accela records that have been implemented and may not seem intuitive for the hybrid projects. Refer to the topics below for detailed instructions.

Reviewers will send out their *cycle issues report* as they complete each cycle, but resubmittal can only happen after all reviews have been complete. Address all cycle issues prior to resubmitting any new plans. You cannot resubmit to each specific discipline – resubmittals are for all disciplines at the same time.

- For help with user accounts or uploading documents, please call us at 619-446-5000.
- For project status or questions about your project, complete the Project Status Request form

Topics – Click on the links below to skip to the specific sections

1. Frequently Asked Questions (FAQs)
2. Requesting a Project Setup for Permit or Construction Change
3. Submitting Documents for Project Review Initial Submittal / Updates Required / Recheck Required / Issuance Checklist Items
4. Submitting "Ready for Final Version" Documents
5. Downloading Approved Plans

Rules

- All **NEW** projects, corrections and construction changes need to be submitted electronically.
- All project types qualify for electronic document submittal (Building, Discretionary, Engineering, Mapping, Construction Change, etc.)

Website and Login

1. Visit OpenDSD website.
2. Create/register for new User Account. For information regarding set up of an account and details of the account functionality, click here. Having trouble creating an account? Please call us at 619-446-5000.
3. One-hour time out from time of login
4. The "Save and Resume" button shown on website does not apply to hybrid Accela/PTS projects

Plan Requirements

- PDF format only.
- **Plans must have the PTS # printed on them for final version.**
- Plans must be landscape oriented and must be all on same sized sheets.
- Files shall be limited to 200MB. When uploading documents, if there are multiple files that make up your design documents, you must select consecutive volumes for each file being submitted (e.g. Building/Construction Plans, Building/Construction Plan Vol. 2, etc.). Each document type can only be used once per submittal or you will overwrite the previously uploaded document. If you have multiple documents of the same document type (for example, Specifications), combine them into one file for upload.
- **Flatten all drawing layers** in your CAD program before creating the PDF. Pages must be straight, clear with no streaks; sheets must be contrasting with background and not too light or dark.

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- Do not submit 'password protected' or 'locked' documents. The Security Method must be set to "No Security". No security certificates can be in place.
- Failure to submit correctly will result in the submittal being returned, which will delay review.

File Organization

- Each document will be uploaded individually; do not combine documents. Example; Building Construction Plans and Reports are separate documents, but Building Construction Plans can contain Architectural, Structural, Elevations, and Detail sheets, etc.
- Refer to the Project Submittal Manual for required documents

Terms

Initial Submittal
First time submittal of documents for Completeness Review

Submitted
Documents have been uploaded and the portal closed for uploading

Completeness Review
Review by staff to see if uploaded documents meet minimum submittal requirements and are ready for Discipline Reviews

Updates Required
Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required

Recheck Required
Plans have been reviewed and have corrections (Cycle Issues Report and Submittal Requirements provided through PTS and available on OpenDSD) Repeat until all issues are signed off

Ready for Final Version
All disciplines have completed reviews and cleared outstanding issues. Awaiting upload of plan set reflecting all corrections for comparison to approved version

Ready for Issuance
Plans have been stamped and required items identified in the Project Tracking System (PTS) Submittal Requirements Report for permit issuance.

Approved
Permit has been issued in PTS

▸ **Frequently Asked Questions (FAQs)**

Do I need an account to submit projects?
Yes, login to your OpenDSD account to apply for a permit. if you don't have an account, review our tutorial and watch our video (6:12) about how to register for an online permitting account.

Who do I contact if I need help?
Call us at 619-446-5000

Who do I contact if I need a project status?
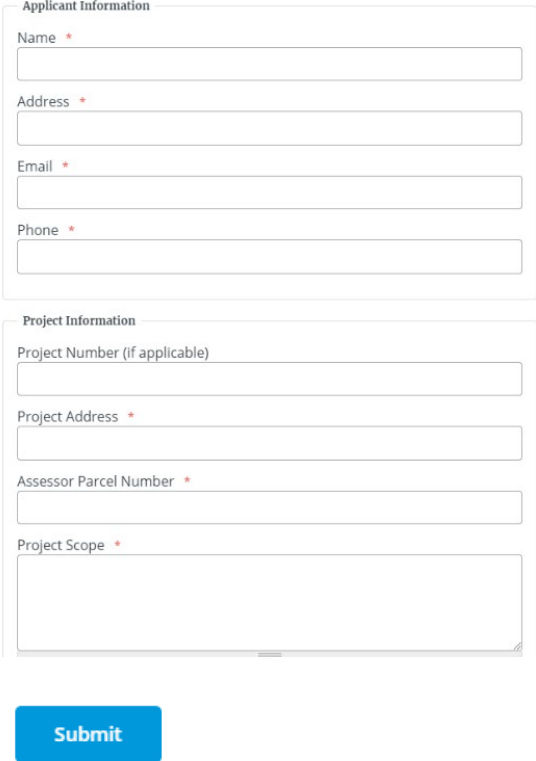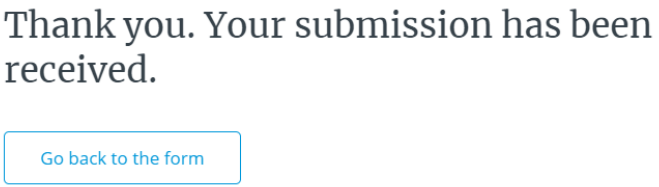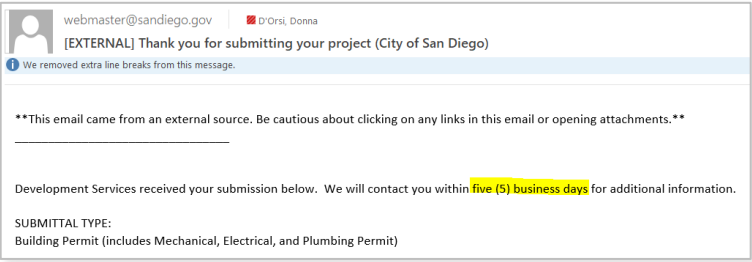Complete a Project Status Request form

Record Structure

PTS-0XXXXXX: This is where the status is tracked and the workflow is progressed. After each "Submittal" is either "Deemed Complete" or "Updates Required," the package documents will be copied to this PTS record and be visible there.

JUMP TO:

▸ What does it mean when my PTS-0XXXXXX status is...?

▸ I uploaded the wrong document for my initial project submittal. Who do I contact?

▸ When I try to upload, I keep getting an error message. Why does this keep happening?

▸ Where can I locate my projects for DSD Permits (Development Services Department projects)?

▸ It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?

▸ How do I retrieve a forgotten username or password?

▸ I found an option on my account that says, "Add a Delegate." What does that mean?

▸ What does "Add Collection" mean?

▸ I noticed my customer information is incorrect. Who do I contact to correct this issue?

▸ Hints and tips for a successful submittal with multiple documents

REQUESTING A PROJECT SETUP

Step	Action	Screen Reference
1	1. In OpenDSD 2. Select 'Apply for a Permit' 3. Select Permit Type 4. Fill out the required* fields 5. Click → Submit	**Applicant Information** Name * Address * Email * Phone * **Project Information** Project Number (if applicable) Project Address * Assessor Parcel Number * Project Scope * **Submit**
2	You will receive this message	**Thank you. Your submission has been received.** Go back to the form
3	A system generated email will be sent. DSD staff will set up your project in PTS and you will receive a follow up email providing the new PTS #	webmaster@sandiego.gov D'Orsi, Donna [EXTERNAL] Thank you for submitting your project (City of San Diego) We removed extra line breaks from this message. **This email came from an external source. Be cautious about clicking on any links in this email or opening attachments.** Development Services received your submission below. We will contact you within five (5) business days for additional information. SUBMITTAL TYPE: Building Permit (includes Mechanical, Electrical, and Plumbing Permit)

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SUBMITTING DOCUMENTS FOR PROJECT REVIEW INITIAL SUBMITTAL / UPDATES REQUIRED RECHECK REQUIRED / CHECKLIST ITEMS

Step	Action	Screen Reference
1	Log in	
2	Click on "DSD Permits"	
3	Click on "Create an Application" This will create the PTSDOC record that will hold the documents that you upload.	
4	Accept the Disclaimer and click "Continue Application"	
5	• Select **PTS Electronic Submittal** record. • Click "Continue Application"	

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6	Enter the PTS project number provided in the email. Answer **No**. Click "Continue Application"

Custom Fields

PROJECT VALIDATION

* Enter PTS Project ID: `PTS-XXXXXXX`

* Is this submittal for a Final Version?: `No`

> Make sure you include the leading 0 PTS-0XXXXXX

> Each time, answer "No" until asked to upload Final Version

Continue Application »

7	On the Document Upload page, select "Add"

Step 2 : Documents > Upload

Attachment

To upload attachments:
1. Click Add to start the process
2. Click Add for each file to upload
3. Click Continue when done
4. Click Save after entering any additional information

The Last Update columns will say Pending until all attachments have been uploaded.

The maximum file size allowed is **100 MB**.
PDF is the only allowed file type to upload.

Name	Type	Size
No records found.		

Add

Save and resume later

8	• Select "Add" again to choose file to upload • Repeat until all documents are uploaded

File Upload ×

The maximum file size allowed is 100 MB.
PDF is the only allowed file type to upload.

Continue   Add   Remove All   Cancel

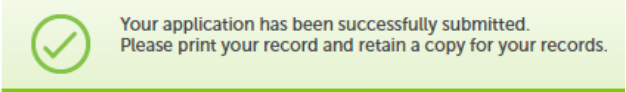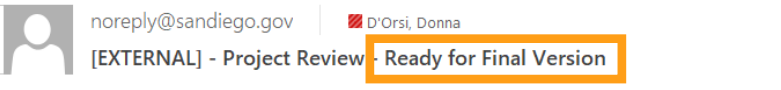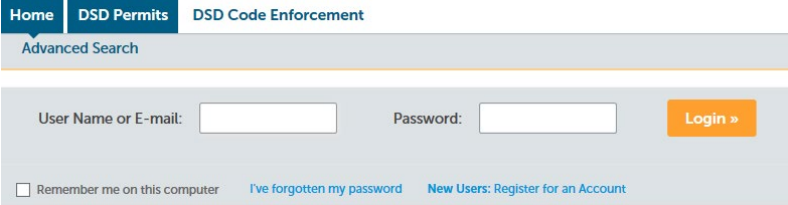| 9 | Identify each document you uploaded from the drop-down menu and provide a description of each document.

1. Click "Save" after adding descriptions
2. Then, click "Continue Application"
3. The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects | 5.

Identify document type

* Type:
Building Construction Plans

File:
Building Construction Plans PRJ-1020461.pdf
100%
* Description:
Initial submittal for plan review

Add description of document

Save   Add   Remove All

Continue Application » |

10	1. Review documents that were uploaded. 2. 'Add' additional documents, if needed. 3. Click 'Continue Application' 4. The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects	**Attachment** To upload attachments: 1. Click Add to start the process 2. Click Add for each file to upload 3. Click Continue when done 4. Click Save after entering any additional information The Last Update columns will say Pending until all attachments have been uploaded. The maximum file size allowed is 100 MB. PDF is the only allowed file type to upload. | Name	Type	Size
GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB | Add

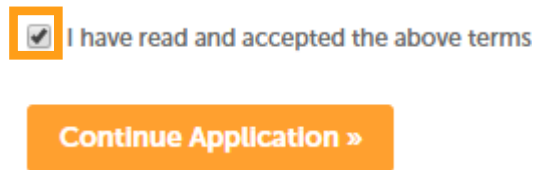| 11 | Agree to the certification and click 'Continue Application'

The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects | I certify that I have read and understand the instructions that accompar information has been omitted. By checking the box below, I understand

☑ By checking this box, I agree to the above certification.

Continue Application » |

12	You will see this message	Your application has been successfully submitted. Please print your record and retain a copy for your records.
13	Document submittal will go through Completeness Review by Intake Staff	Wait for next communication from DSD

SUBMITTING "READY FOR FINAL VERSION" DOCUMENTS

Step	Action	Screen Reference
	You received an email notification to resubmit documents Final Version Comparison.	noreply@sandiego.gov D'Orsi, Donna [EXTERNAL] - Project Review - Ready for Final Version Please upload Final version to be stamped. PTS-0656063
1	Log in	Home DSD Permits DSD Code Enforcement Advanced Search User Name or E-mail: [ ] Password: [ ] Login » ☐ Remember me on this computer I've forgotten my password New Users: Register for an Account
2	Click on "DSD Permits"	Home DSD Permits DSD Code Enforcement Dashboard My Records My Account Advanced Search
3	Click on "Create an Application"	Home DSD Permits DSD Code Enforcement Create an Application Search Applications

4	Accept the Disclaimer and click "Continue Application"	☑ I have read and accepted the above terms **Continue Application »**
5	• Select PTS Electronic Submittal record. • Click "Continue Application"	○ PTS Electronic Submittal ▶ Residential Solar Photovoltaic ▶ Simple Permit - No-Plan ▶ Use ▶ Construction Change **Continue Application »**
6	Enter your PTS project number. Answer **YES (This is the only time you answer YES)** Click "Continue Application"	**Custom Fields** PROJECT VALIDATION *Enter PTS Project ID: `PTS-XXXXXXX` *Is this submittal for a Final Version?: `No` Make sure you include the leading 0 PTS-0XXXXXX Answer YES **Continue Application »**
7	On the Document Upload page, select "Add"	Step 2 : Documents > Upload **Attachment** To upload attachments: 1. Click Add to start the process 2. Click Add for each file to upload 3. Click Continue when done 4. Click Save after entering any additional information The Last Update columns will say Pending until all attachments have been uploaded. The maximum file size allowed is **100 MB**. PDF is the only allowed file type to upload. Name　　　　　Type　　　　　Size No records found. **Add** **Save and resume later**

8	Select 'Add' Only upload Final Version of Plans to be stamped.	**File Upload** ✕ The maximum file size allowed is 100 MB. PDF is the only allowed file type to upload. Continue Add Remove All Cancel
9	Identify each document you uploaded from the drop-down menu and provide a description of each document. 1. Click "Save" after adding descriptions 2. Then, click "Continue Application" 3. The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects	*Type: Building Construction Plans ▾ Identify document type File: Building Construction Plans PRJ-1020461.pdf 100% *Description: Initial submittal for plan review Add description of document Save Add Remove All Continue Application »

10	1. Review documents that were uploaded. 2. 'Add' additional documents, if needed. 3. Click 'Continue Application' 4. The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects	**Attachment** To upload attachments: 　1. Click Add to start the process 　2. Click Add for each file to upload 　3. Click Continue when done 　4. Click Save after entering any additional information The Last Update columns will say Pending until all attachments have been uploaded. The maximum file size allowed is **100 MB**. PDF is the only allowed file type to upload. | Name	Type	Size
GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB | **Add**
11	Agree to the certification and click 'Continue Application' The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects	I certify that I have read and understand the instructions that accompan information has been omitted. By checking the box below, I understand ☑ By checking this box, I agree to the above certification. **Continue Application »**
12	You will see this message	✓ Your application has been successfully submitted. Please print your record and retain a copy for your records.
13	Document submittal will go through Completeness Review by Intake Staff	Wait for next communication from DSD

DOWNLOADING APPROVED PLANS

Step	Action	Screen Reference
1	Log in	**Home** DSD Permits **DSD Code Enforcement** Advanced Search User Name or E-mail: [_____] Password: [_____] Login » ☐ Remember me on this computer I've forgotten my password New Users: Register for an Account
2	1. Search for Approved PTS record 2. Click on Record Number	**Home** DSD Permits DSD Code Enforcement Dashboard **My Records** My Account Advanced Search ▾ DSD Permits Showing 1-10 of 100+	Download results	Add to collection ☐ Date	Record Number	Record Type ☐ 04/17/2020	PTSDOC-0000105	PTS Electronic Submittal ☐ 04/17/2020	PRJ-8000330	Project – Residential – Photovoltaic ☐ 04/16/2020	PTS-0656063	Project – PTS
3	1. Use the Record Info Drop Down. 2. Select 'Attachments'. 3. Click on Building Construction Plans.	Home **DSD Permits** DSD Code Enforcement Create an Application Search Applications Record PTS-0656063: **Project - PTS** **Record Status: Approved** Record Info ▾ Payments ▾ Record Details Processing Status Related Records ➡ Attachments e process e to upload Inspections done ring any additional information The Last Update columns will say Pending until all attachments have been uploaded. The maximum file size allowed is 400 MB. PDF is the only allowed file type to upload. Name	Record ID	Record Type	Type	Size Building Construction Plans PTS-0656063.pdf	PTS-0656063	Project – PTS	Building Construction Plans	557.32 KB General Application (DS-3032) PTS-0656063.pdf	PTS-0656063	Project – PTS	General Application (DS-3032)	557.32 KB

What does it mean when my PTS-0XXXXXX status is...?

Opened
Project has been created and is awaiting document upload

Updates Required
Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required, refer to email sent and upload new requested items.

Deemed Complete
Documents meet minimum submittal requirements and are ready for Discipline Reviews

In Review
Plans have been routed for review assignment, track progress in OpenDSD

Ready for Final Version
All disciplines have signed off, upload plans with all corrections incorporated for comparison.

Final Version Submitted
You have uploaded final version for comparison and stamping by staff

Ready for Issuance
Plans have been stamped and required items identified in the Project Tracking System (PTS) Submittal Requirements Report for permit issuance.

Approved
Your permit has been issued in PTS.

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I uploaded the wrong document for my initial project submittal. Who do I contact?

You will not be able to upload any documents once your documents are in **"Submitted"** status. You will need to wait until the cycle is processed by staff and they change the status to "Updates Required," so you can upload your new version.

*** If your project is **"In-Review,"** you will not be able to upload additional documents to the project ***

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When I try to upload, I keep getting an error message. Why does this keep happening?

This usually means one of three things:

1. You have not formatted the PTS-0XXXXXX number correctly when entering it, or:
2. You are trying to upload using the "Attachments" link under the "Record Info" tab. You need to start each document upload with "Create an Application"
3. Your project is in "Submitted" status and therefore will not allow uploads. This is to limit new versions being uploaded while the documents are being processed or the project is in review.
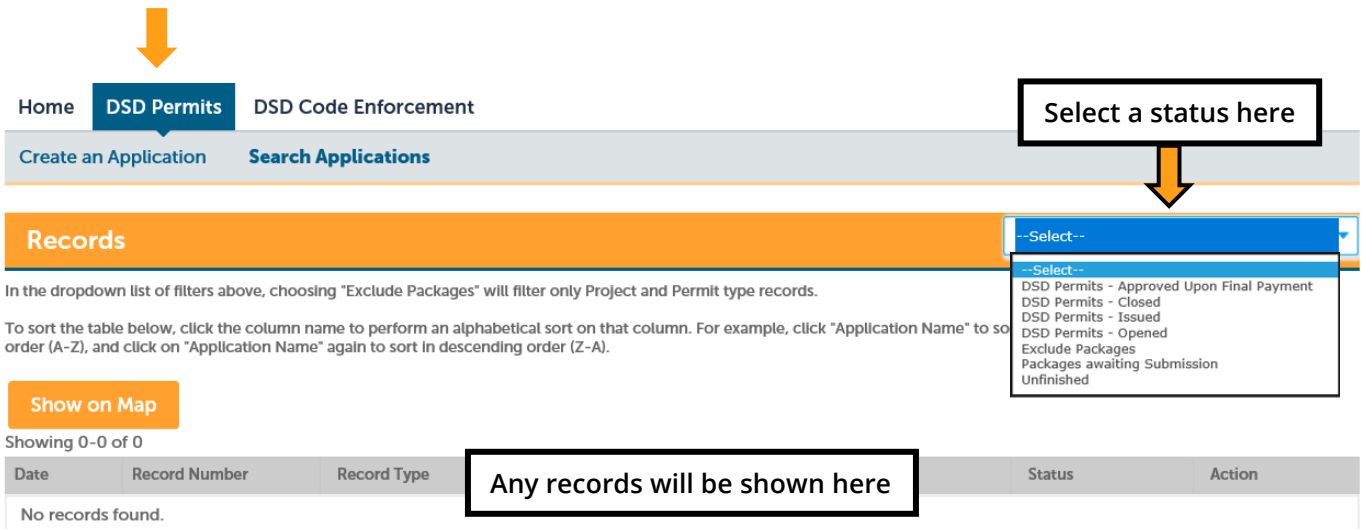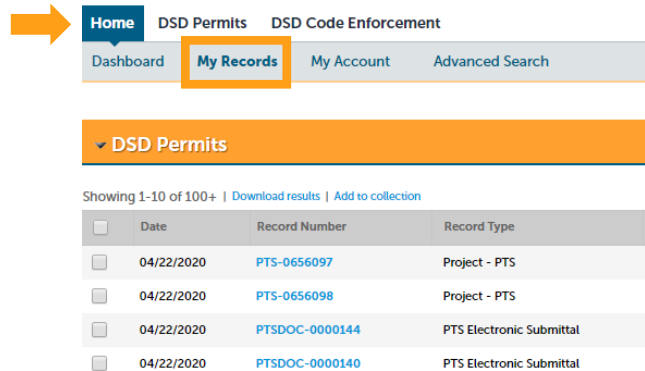
    Call us at 619-446-5000 if this persists

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Where can I locate my projects for DSD Permits (Development Services Department projects)?

- To see **PTS records (no PTSDOC records)**, from the 'Home' tab, click the 'My Records' link (see right)

- You can also locate projects **by specific status** by clicking on "DSD Permits", you will be able to view your projects under "Records" (see below).

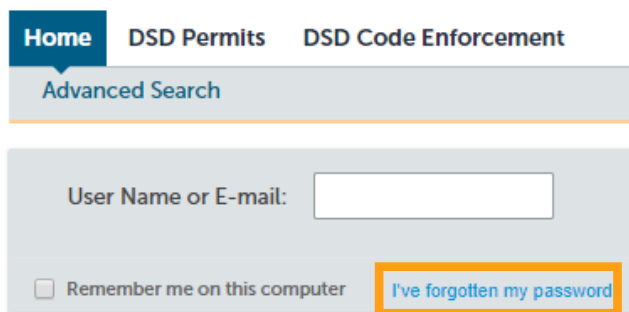 If you click on the "Select" drop down it will give you a list of statuses you can choose from

Home DSD Permits DSD Code Enforcement

Dashboard **My Records** My Account Advanced Search

DSD Permits

Showing 1-10 of 100+ | Download results | Add to collection

	Date	Record Number	Record Type
	04/22/2020	PTS-0656097	Project - PTS
	04/22/2020	PTS-0656098	Project - PTS
	04/22/2020	PTSDOC-0000144	PTS Electronic Submittal
	04/22/2020	PTSDOC-0000140	PTS Electronic Submittal

Home **DSD Permits** DSD Code Enforcement

Create an Application **Search Applications**

Records

Select a status here

--Select--

--Select--
DSD Permits - Approved Upon Final Payment
DSD Permits - Closed
DSD Permits - Issued
DSD Permits - Opened
Exclude Packages
Packages awaiting Submission
Unfinished

In the dropdown list of filters above, choosing "Exclude Packages" will filter only Project and Permit type records.

To sort the table below, click the column name to perform an alphabetical sort on that column. For example, click "Application Name" to so order (A-Z), and click on "Application Name" again to sort in descending order (Z-A).

Show on Map

Showing 0-0 of 0

Date	Record Number	Record Type		Status	Action

Any records will be shown here

No records found.

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It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?

You can fill out an electronic Project Status Request form

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How do I retrieve a forgotten username or password?

Use the 'Forgot Password' link on the OpenDSD Home Page
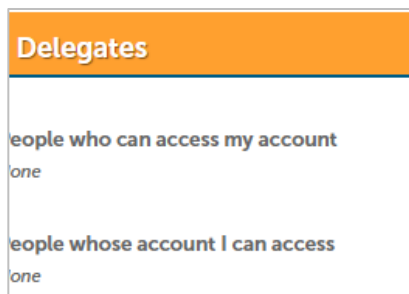
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I found an option on my account that says, "Add a Delegate." What does that mean?

Delegates can be added to your account so that other users can access the account. Use the Account Management link at the upper right of OpenDSD Login page. Note that in order to be a delegate, the user must be registered with an existing account.

The guide for creating an OpenDSD account has detailed steps for adding delegates**. (add link)**

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What does "Add Collection" mean?

A Collection allows you to group records for easy retrieval. It doesn't remove records from the 'My Record' list but creates a subset that allows you to view only the records in the group. You can name them, provide a description, and delete a collection at any time (continued on next page). This is helpful for Organization accounts that have delegates; you can create a collection for each delegate and make it easy for them to view only their records.

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I noticed my customer information is incorrect. Who do I contact to correct this issue?

Fill out a Project Status Request form and provide the correct information

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Hints and tips for a successful submittal with multiple documents

1. Be organized. Create a folder for your Project. Name all the files based on what the document type is going to

be. Split these up into batches of 5 files per folder
2. In Accela, when you click ADD, go to the Project, first folder, and add all the files in it, one after the other, then CONTINUE
3. Label all the files and provide the description, use the version of the submission, then SAVE
4. After it saves, click ADD, go to the next folder with your files, and add those one after the other, then CONTINUE
5. Label, provide description, then SAVE and repeat until you are done.
6. Do not upload a document type more than once, it will overwrite the previous document. If you have more than one document for calculations, combine them into one pdf for upload.
7. Only building construction plans and calculations allow you to upload volume #s

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