

OpenDSD User Guide for PTS Projects

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, email DSD-OpenDSDHelp@sandiego.gov
- 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. [Requesting a Project Setup for Permit or Construction Change](#)
2. [Submitting Documents for Project Review Initial Submittal / Updates Required / Recheck Required / Issuance Checklist Items](#)
3. [Submitting “Ready for Final Version” Documents](#)
4. [Downloading Approved Plans](#)
5. [Frequently Asked Questions \(FAQs\)](#)

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? Email DSD-OpenDSDHelp@sandiego.gov
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 100MB. **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.

- 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

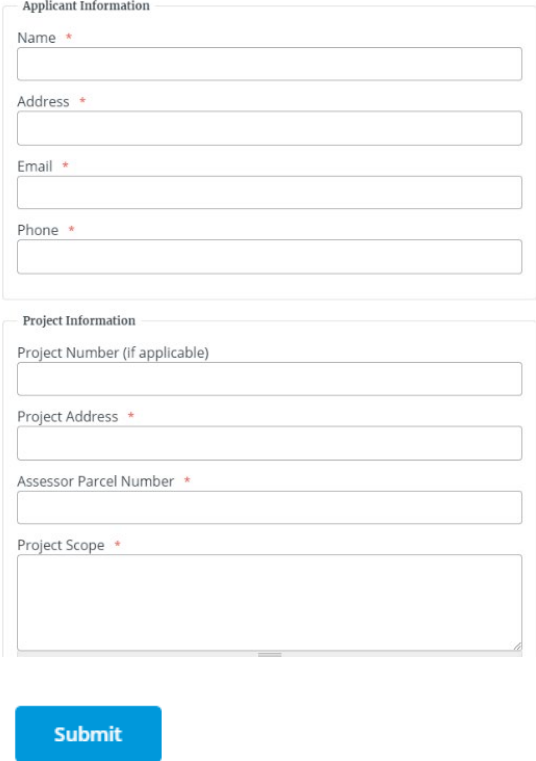
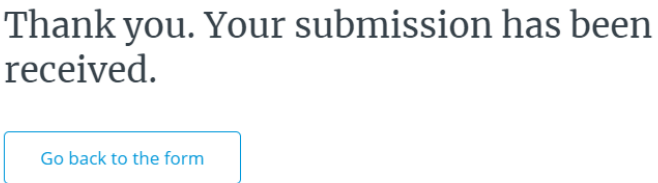
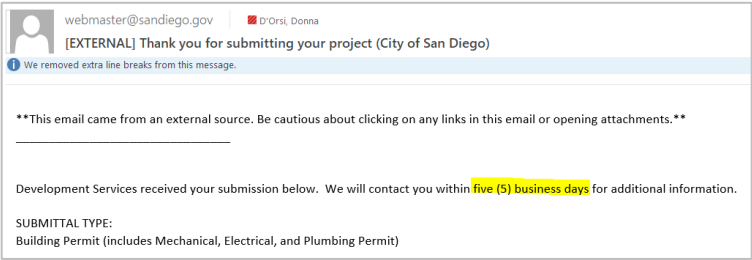
Ready for Issuance

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

REQUESTING A PROJECT SETUP

Step	Action	Screen Reference
1	<ol style="list-style-type: none"> 1. In OpenDSD 2. Select 'Apply for a Permit' 3. Select Permit Type 4. Fill out the required* fields 5. Click → Submit 	
2	<p>You will receive this message</p>	
3	<p>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 #</p>	

**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"	
4	Accept the Disclaimer and click "Continue Application"	
5	<ul style="list-style-type: none"> • Select PTS Electronic Submittal record. • Click "Continue Application" 	

6

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

Custom Fields

PROJECT VALIDATION

*Enter PTS Project ID:

*Is this submittal for a Final Version?:

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.

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

Name	Type	Size
GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB

Add

11

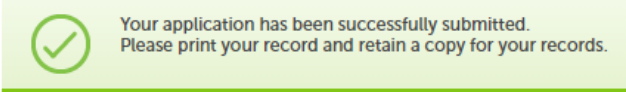
Agree to the certification and click 'Continue Application'

The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects

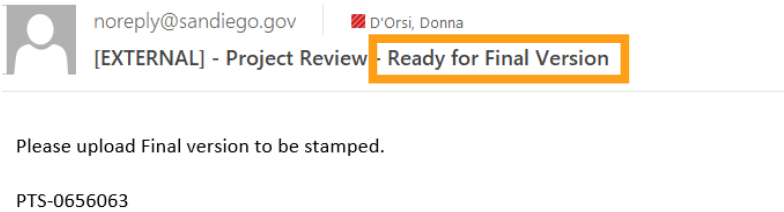
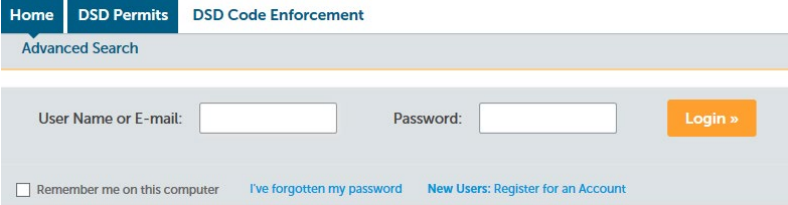


I certify that I have read and understand the instructions that accompany this information. By checking the box below, I understand that the information has been omitted.

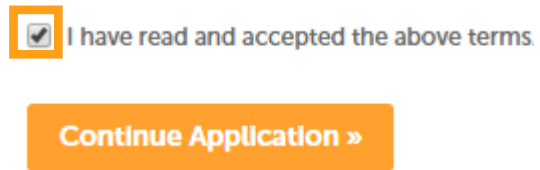
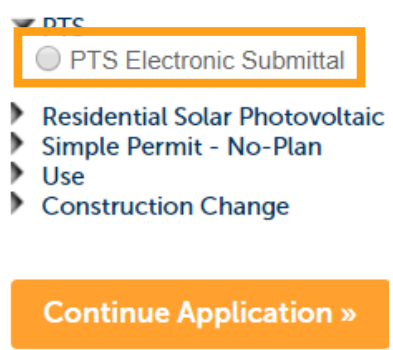

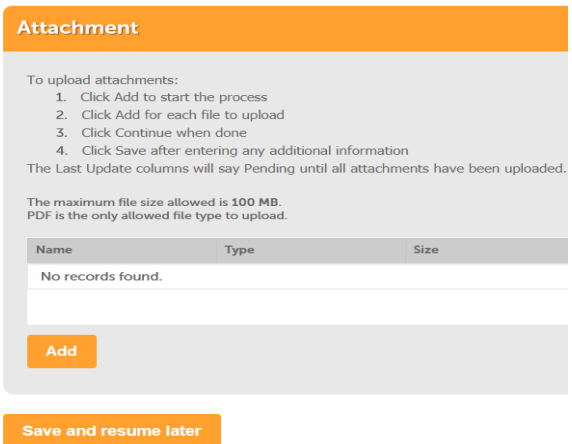
By checking this box, I agree to the above certification.

Continue Application »

12	You will see this message	
13	Document submittal will go through Completeness Review by Intake Staff	Wait for next communication from DSD

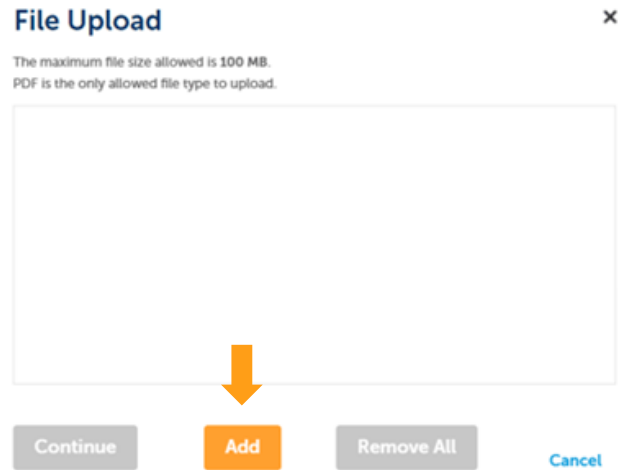
SUBMITTING "READY FOR FINAL VERSION" DOCUMENTS

Step	Action	Screen Reference
	You received an email notification to resubmit documents Final Version Comparison.	
1	Log in	
2	Click on "DSD Permits"	
3	Click on "Create an Application"	

<p>4</p>	<p>Accept the Disclaimer and click "Continue Application"</p>	
<p>5</p>	<ul style="list-style-type: none"> • Select PTS Electronic Submittal record. • Click "Continue Application" 	
<p>6</p>	<p>Enter your PTS project number. Answer YES (This is the only time you answer YES) Click "Continue Application"</p>	
<p>7</p>	<p>On the Document Upload page, select "Add"</p>	<p>Step 2: Documents > Upload</p> 

8

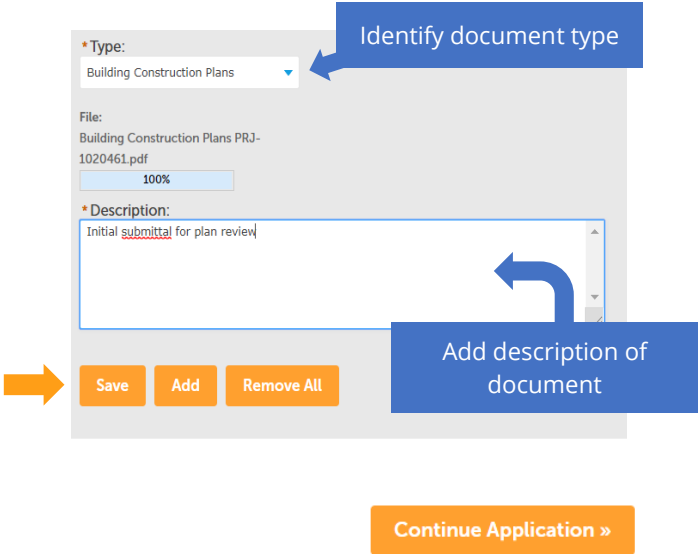
Select 'Add'
Only upload Final Version of Plans to be stamped.

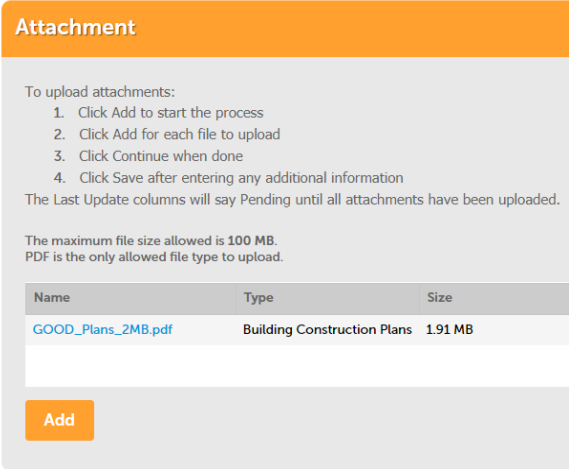
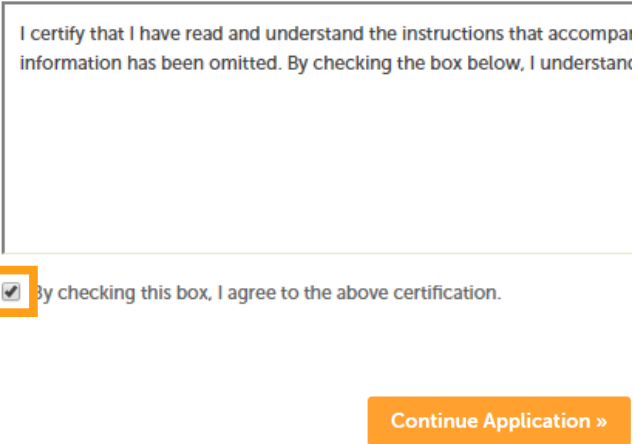
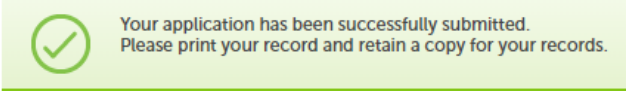


9

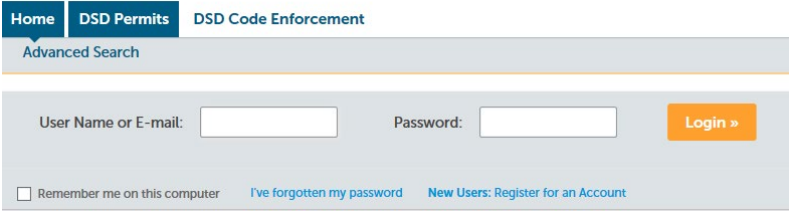
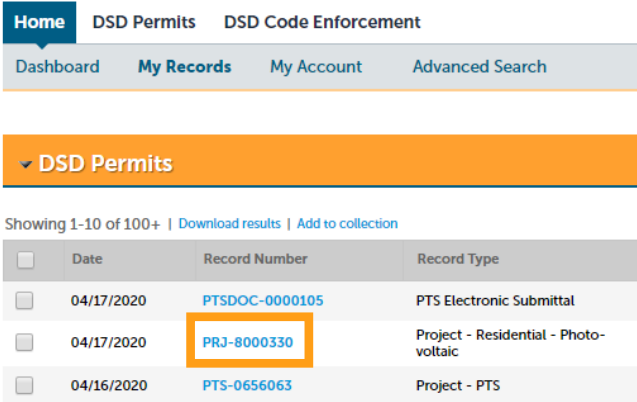
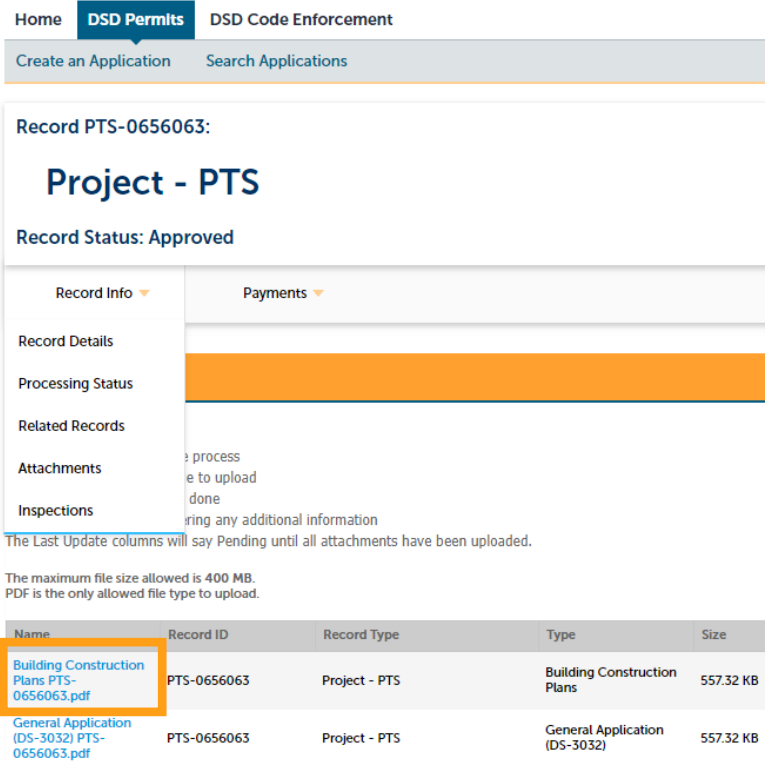
Identify each document you uploaded from the drop-down menu and provide a description of each document.

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



<p>10</p>	<ol style="list-style-type: none"> 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 	 <p>Attachment</p> <p>To upload attachments:</p> <ol style="list-style-type: none"> 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 <p>The Last Update columns will say Pending until all attachments have been uploaded.</p> <p>The maximum file size allowed is 100 MB. PDF is the only allowed file type to upload.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>GOOD_Plans_2MB.pdf</td> <td>Building Construction Plans</td> <td>1.91 MB</td> </tr> </tbody> </table> <p>Add</p>	Name	Type	Size	GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB
Name	Type	Size						
GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB						
<p>11</p>	<p>Agree to the certification and click 'Continue Application'</p> <p>The 'Save and Resume' button shown on website does not apply to hybrid Accela/PTS projects</p>	 <p>I certify that I have read and understand the instructions that accompany this information has been omitted. By checking the box below, I understand</p> <p><input checked="" type="checkbox"/> By checking this box, I agree to the above certification.</p> <p>Continue Application »</p>						
<p>12</p>	<p>You will see this message</p>	 <p>✓ Your application has been successfully submitted. Please print your record and retain a copy for your records.</p>						
<p>13</p>	<p>Document submittal will go through Completeness Review by Intake Staff</p>	<p>Wait for next communication from DSD</p>						

DOWNLOADING APPROVED PLANS

Step	Action	Screen Reference
1	Log in	
2	<ol style="list-style-type: none"> 1. Search for Approved PTS record 2. Click on Record Number 	
3	<ol style="list-style-type: none"> 1. Use the Record Info Drop Down. 2. Select 'Attachments'. 3. Click on Building Construction Plans. 	

▶ 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 registering for an online permitting account.

Who do I contact if I need help?

DSD-OpenDSDHelp@sandiego.gov

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](#)

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.

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 ***

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

This usually means one of three things:

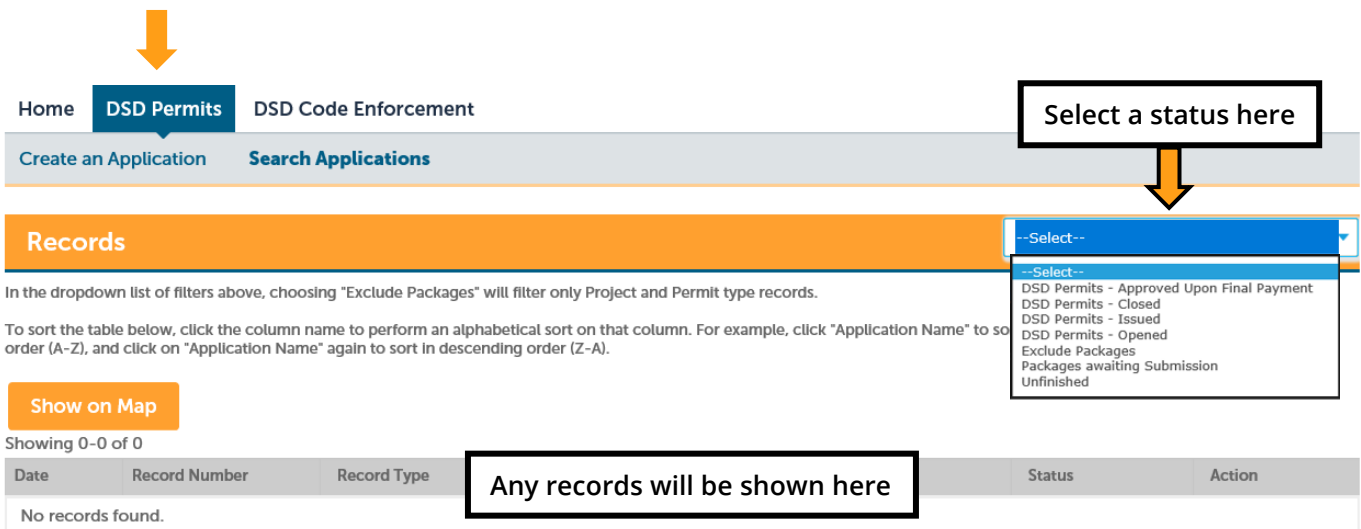
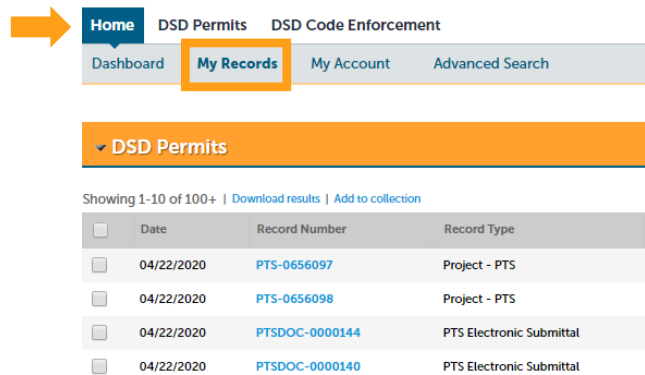
1. You have not formatted the PTS-0XXXXXX number correctly when entering it, or:
2. You are trying to upload using the "Attachments" link under the "Record Info" tab. You need to start each document upload with "Create an Application"
3. Your project is in "Submitted" status and therefore will not allow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

Contact DSD-OpenDSDHelp@sandiego.gov if this persists

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

- To see **only 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

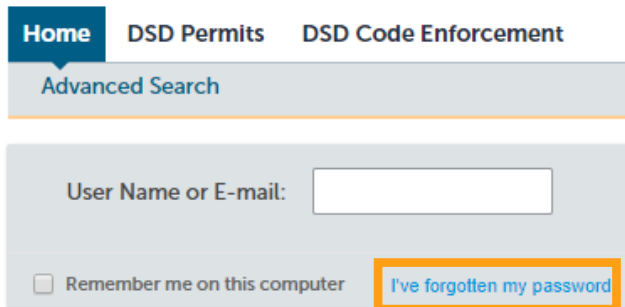


It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?

You can fill out [an electronic Project Status Request form](#)

How do I retrieve a forgotten username or password?

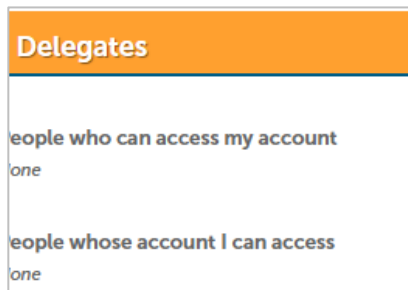
Use the 'Forgot Password' link on the [OpenDSD](#) Home Page



The screenshot shows the top navigation bar with 'Home', 'DSD Permits', and 'DSD Code Enforcement'. Below is an 'Advanced Search' bar. The main login area contains a 'User Name or E-mail:' text box, a 'Remember me on this computer' checkbox, and a blue link labeled 'I've forgotten my password' which is highlighted with an orange box.

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 screenshot shows a section titled 'Delegates' with an orange header. Below the header, there are two sections: 'people who can access my account' with a count of 'one', and 'people whose account I can access' with a count of 'one'.

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).

Home **DSD Permits** DSD Code Enforcement

Create an Application Search Applications

Records

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 "App" sort in descending order (Z-A).

Showing 1-10 of 31 | [Download results](#) | [Add to collection](#)

<input type="checkbox"/>	Date	Record Number	Record Type	Application Name	Status
<input type="checkbox"/>	04/16/2020	PTSDOC-		Submittal	PTS-0656062
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656053
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656056
<input type="checkbox"/>	04/15/2020	20TMP-0		Submittal	PTS-0656056
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656005
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656056
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656056

Create a New Collection

* Name:

Description:

Dashboard My Records My Account Advanced Search

Pending
some description

Total Records: 2 (2 DSD Permits)
Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)
Fees Summary: \$0.00 Paid, \$0.00 Due

DSD Permits

[Move to...](#) | [Copy to...](#) | [Remove](#)

Showing 1-2 of 2 | [Download results](#)

<input type="checkbox"/>	Date	Record Number	Record Type	Application Name	Description	Status	Action
<input type="checkbox"/>	04/17/2020	PRJ-8000330	Project - Residential - Photo-voltaic	Project - Residential - Photo-voltaic:1250/Heritage		In Queue	
<input type="checkbox"/>	04/15/2020	PRJ-8000329	Project - Residential - Photo-voltaic	Project - Residential - Photo-voltaic:3260/Anella		In Review	

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

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 allow you to upload volume #s