

## **PROCEDURE: PLAN REVIEW SUBMITTALS FOR ELECTRONIC SUBMISSION AND REVIEW**

**SUPERSEDES:** PR 09-05

**PURPOSE:** This procedure provides a method of digital submission of project documents for Division of the State Architect (DSA) review and approval. Submittals will be made to the Intake Project Review Box, a secure cloud-based, collaborative, online file-sharing website.

This method replaces the use of File Transfer Protocol (FTP) servers, which are no longer being utilized by DSA. Further, compact discs will no longer be required.

**BACKGROUND:** The Intake Project Review Box allows internal and external stakeholders to share, view, and collaborate in real time in one location. Documents which historically were mailed, processed, and filed physically can now be transferred via the Internet.

Each design professional receives his or her own designated project folder to submit project documents. The ability to access documents is immediate and fully accessible to collaborators identified to work on the project.

**PROCEDURE:** All projects submitted for electronic review shall be submitted to the Intake Project Review Box. Folders will be established by the DSA regional offices in two tracks: the Intake Track and the Project Track. A project folder will be created in the Intake Track for initial document submittal. Once DSA determines that all plan review submittal requirements are met, the project folder will be moved to a Project Track where the plan review process will occur. Please refer to Appendix A for further description of the Intake Project Review Box configuration.

This procedure lists the processes and requirements for requesting permissions to the Intake Track folder in the Intake Project Review Box, and establishing project folders for uploading project documents for review.

- 1. COMPLETE FORM [DSA 95 \(INTAKE PROJECT REVIEW BOX REQUEST\)](#).** The design professional must complete form DSA 95 and submit via email to the DSA intake specialist for the DSA regional office having jurisdiction.
  - 1.1** The DSA intake specialist will forward form DSA 95 to the document analyst in their DSA regional office.
- 2. PROJECT FOLDER CREATED WITHIN INTAKE TRACK FOLDER.** The DSA document analyst creates the project folder in the Intake Track folder and names it with the school name and district (e.g. ABCschool\_District).
  - 2.1** A digital copy of form DSA 95 should be placed in the project folder by the DSA document analyst.
  - 2.2** The DSA document analyst sends an invitation to the design professional, all collaborators (listed on form DSA 95), and the DSA intake specialist via email through DSAbbox.
  - 2.3** The design professional and all collaborators must accept the invitation to the Intake Project Review Box. For more information about accepting the Intake Project Review Box invitation, refer to:

<https://dsabox.app.box.com/s/cddhjymdms4v9vtc6ft5/1/1111643067/10033646725/1>

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### 3. SUBMISSIONS TO DSA.

- 3.1 The design professional and collaborators shall submit all project documents to the created project folder, including:
- Application
  - Working drawings
  - Project specifications
  - Structural calculations
  - Fire alarm component documents
  - Access compliance component documents
  - Energy calculations
  - Any other project related documents
- 3.2 For information regarding the recommended naming conventions, please refer to Appendix B.
- 3.3 The design professional shall submit all fees with a copy of both the application and form DSA 95 to the DSA cashier.

### 4. DSA INTAKE PROCESS. The DSA intake specialist assesses whether the submittal is complete; if it is complete, the intake specialist informs the cashier that an application number may be assigned.

- 4.1 The DSA cashier processes the fees, enters the application into DSA's Tracker system, assigns the project an application number and informs the DSA intake specialist.
- 4.2 Upon receiving the application number, the DSA intake specialist:
- Records the date documents and fees were received and updates Tracker as appropriate.
  - Requests that the DSA document analyst rename and move the project folder to the Project Track.
  - Notifies supervisors when the project is ready for plan review.
- 4.3 The DSA document analyst renames the project folder to the application number, and moves the project folder to the Project Track for plan review when complete.

*NOTE: The design professional and all collaborators will maintain access to the project folder when it is moved to the Project Track.*

### 5. PLAN REVIEW. DSA supervisors assign the project to DSA plan reviewers and request that the DSA document analyst invite the DSA plan reviewers through DSAbbox.

- 5.1 The DSA document analyst invites DSA plan reviewers through DSAbbox.
- 5.2 DSA plan reviewers perform plan review based on the individual DSA regional office procedures.
- 5.3 The design professional and collaborators as well as DSA staff will transmit plan review documents using the project folder within the Project Track.

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### **ADDITIONAL RESOURCES:**

- Intake Project Review Box Information available:  
<http://www.dgs.ca.gov/dsa/Programs/progProject/dsabox.aspx>

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A Division of the State Architect (DSA) Procedure documents a process or series of steps that DSA staff and/or external stakeholders must complete in order to fulfill one or more administrative requirements of DSA's plan and construction review programs.

APPENDIX A

INTAKE PROJECT REVIEW BOX FLOW CHART



