

## PDCA v2 – Application Updates

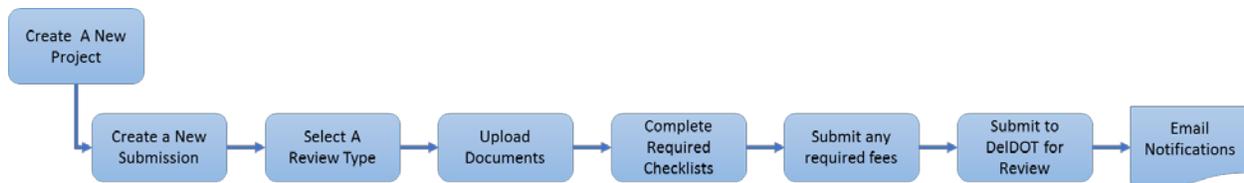
What has changed in the new PDCA:

- Project Details Page and Status information for a project – updated to reflect new submission workflow
- Project creation questions – added additional questions to help determine project type
- Submission Process – Project's now have multiple submissions types, opposed to a single submission.
- Submission no longer required to create a single .zip file for documents to be uploaded
- Submissions can be deleted before they have been submitted to DeIDOT.
- PDCA User accounts can be associated with more than one organization
- Organizations can identify user administration accounts allowing them to manage the contacts within their organization.

What has not changed in the new PDCA:

- Meeting request process
- Fee determination and payment process
- Email notifications
- User Account information – Existing username and password information can be used to access to the new PDCA.

The overall workflow for submitting a project and plan(s) for review will follow this general workflow:



The one major change from the previous version of the PDCA is that **separate submissions** for **each review type** are now required. So, for a major project, there will be separate submissions for a Record Plan, an Entrance Plan, etc. The specific steps for submitting a plan for review are outlined further below.

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## Project Details page

For projects that have multiple review submissions, each submission is displayed with this information along with a color-coded value that indicates the status of the submission.

In addition, the project card provides general information on the status of that help identify the overall status of a project.

- **Not Submitted** – Indicates that one or more review types have been created in the PDCA, but not submitted to DeIDOT.
- **Under Review** – Indicates that all review types have been submitted to DeIDOT and are currently under review.
- **Needs Attention** – Indicates that one or more review types needs some additional input; either it has been sent back for more information, or has been declined outright.

## Adding a New Project

New Prerequisites:

- Clicking on “Add Project” now prompts for a Project Name, as well as, the Developer and Engineer Organizational information
- Followed is a list of questions to help determine the project type

## Creating a New Submission

Once a project has been created, the next step is to add a submission to the project.

- A project now contains one or more review types (submissions).
- For a project with multiple review types, **separate submissions** for **each review type** must be uploaded and submitted to DeIDOT. (At the bottom of the Project Information section, there is a **Create New Submission** button that will add a new, empty submission to the project.)

## Selecting a Review Type

Once a new submission has been created, the next step is to select the review type for the submission.

- There is only one review type available per submission. For a specific project type the types of reviews available are as follows:
  - **LONC** → LONC/PEC
  - **Minor** → Minor Residential Subdivision, Lot Line Adjustment
  - **Major** → LONOR/Record Plan, Commercial Entrance Plan, Subdivision Street, Off-Site Review, LONO/Recordable Boundary Plat, Subdivision Construction/ Entrance, Industrial Street, TIS Recommendations, TOA Recommendations
- In the submission window, click the drop down for **Select a review type:**
- Only one review type is allowed per submission. If multiple review types are needed, a separate submission must be created for each review type.

## Upload Documents

With the new submission created, and the review type selected, the next step is to upload the documents associated with the review type for this submission.

A couple of key points regarding the files to be uploaded

- Do **not** upload .zip files – upload the documents directly. The PDCA will not allow uploads of a .zip file.
- When uploading PDF plan documents ensure that the PDF files are flattened prior to uploading them.

Once the documents are ready,

- Drag and drop them into the Upload Documents window
- Click **Browse** and navigate to the files to be uploaded.
- Once the files are uploaded,
  - Files can be download and viewed by clicking 
  - Files can be deleted by clicking 
    - Once a project has been submitted for review, files cannot be deleted.

## Complete Required Checklists

The next step in the process is to complete any checklists required by DeIDOT prior to submittal. The review type selected determines the specific checklist(s) that need to be completed prior to submittal.

From the Submission Checklist tab there are two options for each checklist:

- A checklist can be edited by clicking on 
- A checklist can be printed by clicking on 

Prior to sending the submission for review to DeIDOT, all required checklists must be reviewed and annotated with Yes, No, or N/A responses. Any item that is a No or a N/A also requires justification which can be entered in directly through the PDCA.

To complete the checklist review:

- Click on the edit button,  , for the checklist to be reviewed
- A new window will display the contents of the checklist
- For each item, click the appropriate response – **Yes, No, or N/A**
- For items marked with a **No** or **N/A**, type in an explanation and click the save button, 
- Once all items have been reviewed and marked appropriately, click **Save Checklist**
  - Checklist progress can be saved and completed later
  - If a checklist is required, a review type cannot be submitted until the checklist is completed and saved.
- Clicking the <<**Back to Submission** link will display the Project Details page along with all the submissions.
- Once the checklist review has been completed, the status will update to **Completed**

### Submit Any Required Fees (Optional)

With the checklists completed, the last remaining step prior to completing the submission process is to submit any required fees.

### Submit to DeIDOT for Review

Once all the required steps have been completed, the submission is ready to submit to DeIDOT to begin their review process.

- Click on **Submit for Review** to close the submission and submit it to DeIDOT.
- The submission will move from Creating to Submitted and display the date of the submission.
- On the project list page, the submission will be shown as Submitted

### Email Notifications

Once the project has been submitted successfully, an email notification will be sent to all project stakeholders including the Engineering POC, the Developer POC, and the responsible parties within DeIDOT.

The email notification will contain Submission Information to include:

- Original Submission Date
- Project Name
- Engineering Organization
- Engineering Contact
- Developer Organization
- Developer Contact
- Project Type
- Submission Number
- Project Url/Name

## External Administrators – Manage Contacts

External organizations can now designate user accounts within the organization to be the administrator for that organization. The organization administrator can:

- Add new contacts to their organization
- Edit existing contacts in their organization
- Lock existing accounts from accessing their organization

Users identified as the organization administrator have a **Manage Contacts** link at the top of the PDCA. Clicking on this link presents a list of the current users in the organization and a button for adding a new contact

### Add a Contact

- Click on the **Add Contact** button
- Enter the user's email address
  - Must be a valid address
  - Must not be used by another PDCA user account
- Click **Next**
- Enter the user's contact information
- Before setting the Primary Organization
  - Click the **User Organization Tab**
  - Under System Organizations, **select** the organization
  - Click **Add**
  - The organization will be added to the list
  - Click the **User Information** tab
  - The Primary Organization will be set
- For Role, select either External Admin or External User
- Click **Create** to create the new user account

### Edit a User Account

- From the Manage Contacts list, click on the **Action** link
  - **Edit** will open the contact page for editing
  - **Lock** will lock the user account
  - **Reset Password** will reset the user's password