

PDCA v2 – External Application Updates

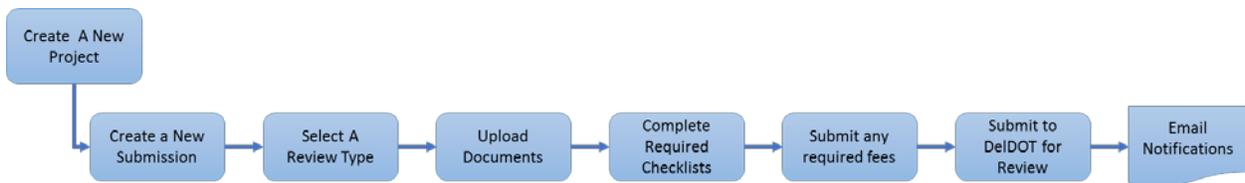
What has changed in the new PDCA:

- 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.

Project Details page

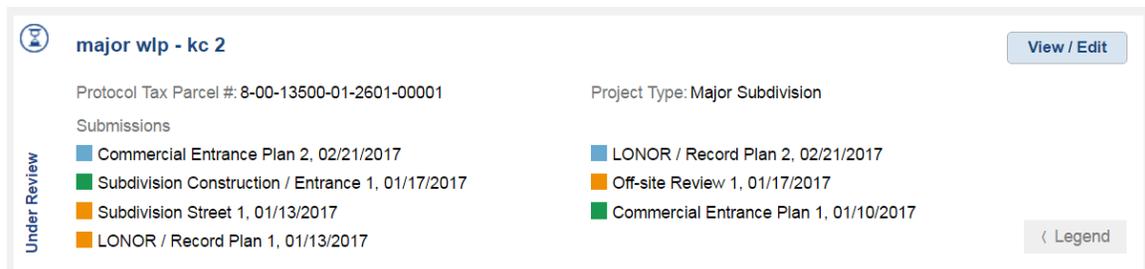
The project details page has been updated to reflect some of the additional changes around submitted plans for review to DeIDOT.



In this example:

- The Project Name is **LONC wlp-sc**
- The Project Type is a **LONC Subdivision**
- This project has one submission – **LONC/PEC, submission number 1, submitted on 02/21/17**

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, as the project below indicates.



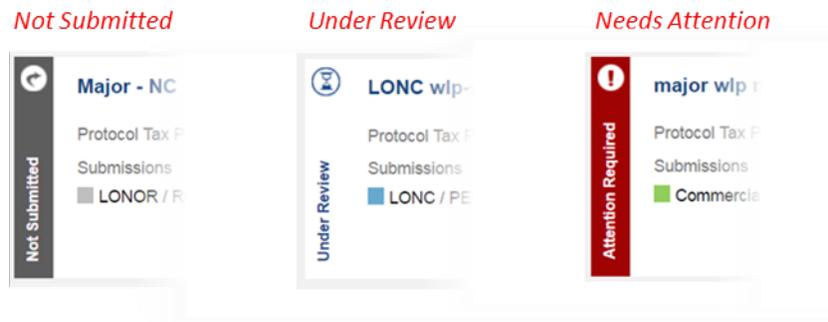
The legend for the color-coded review status are as follows:

- User Creating – Created Submission but not submitted to DeIDOT
- Submitted to DeIDOT – Review Type submitted to DeIDOT
- Pending User Reply – Review requires additional information
- DeIDOT is Reviewing – DeIDOT is actively reviewing
- Completed w/o Comments – Review completed without comments
- Completed w/Comments – Review completed with comments
- Declined – Review has been declined by DeIDOT

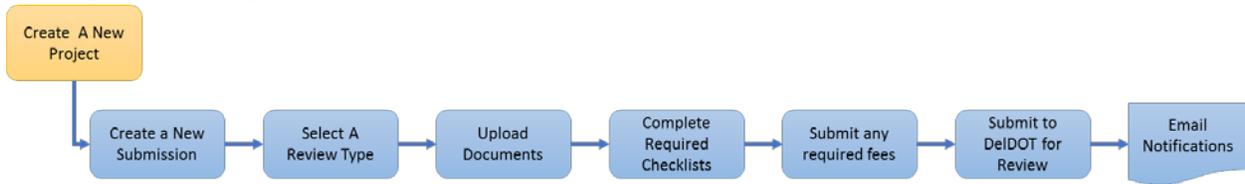
Submission Status Legend	
Grey square	User Creating Submission
Blue square	Submitted to DELDOT
Yellow square	Pending User Reply
Light Green square	DELDOT is Reviewing
Dark Green square	Completed without Comments
Orange square	Completed with Comments
Red square	Declined

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

- **Not Submitted** – This indicates that one or more review types have been created in the PDCA, but not submitted to DeIDOT – this is similar to the yellow boxes around a project in earlier versions of the PDCA.
- **Under Review** – This indicates that all review types have been submitted to DeIDOT and are currently under review – this is similar to the green boxes around a project in earlier version of the PDCA
- **Needs Attention** – This 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



The new release of the PDCA provides an updated list of questions to help determine the appropriate project type. Clicking on Add Project prompts for a Project Name as well as the Developer and Engineer Organizational information as is currently required. This is followed by a list of questions to help determine the project type. The remaining project creation steps remain unchanged from the current version

Adding: A New Project

[<< Back to Project List Dashboard](#)

1 Project Information 2 Determine Project Type 3 Locate on Map 4 Review & Create

2 Determine Project Type

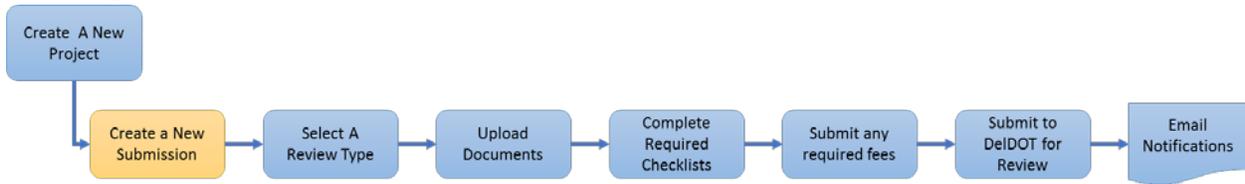
New Project Name:
Your project includes which of the following?

- Non-Residential Development
(Commercial, Retail, Non-Profit, etc.)
- Single Family / Duplex / Townhome Residential Lots
(Detached Dwellings / Separate Lots, not Apartments / Condos)
- Multi-Unit Residential
(Apartments / Condos on shared undivided lots)
- Offsite Improvement
(Road widenings, Intersection Improvements, Traffic Signal Installation)
- Active Agricultural Operations
(Livestock / Poultry / Commercial Crop Production)

Select One or More depending on your project

[<< Back](#) [Continue](#)

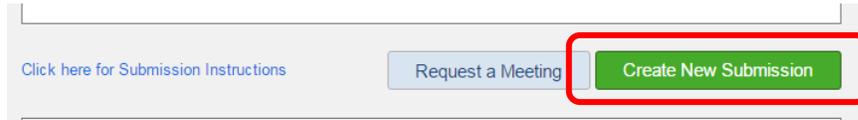
Creating a New Submission



Once a project has been created, the next step is to add a submission to the project. With the update to the PDCA, 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. For example, for a major project, separate submissions are required for a Record Plan review, an Entrance Plan, and Off-Site Review, etc.

At the bottom of the Project Information section, there is a **Create New Submission** button.

- Click on the **Create New Submission** button



- A new empty submission is added to the project

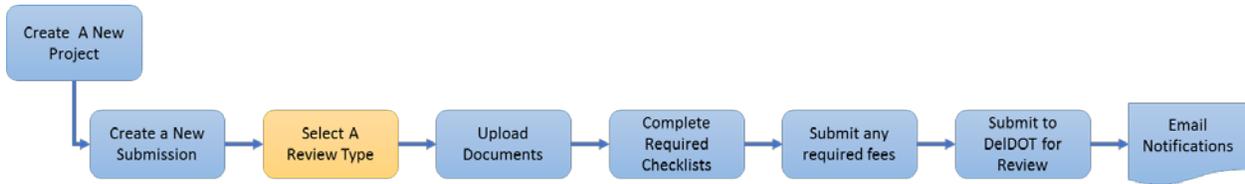
Unsubmitted
Status: Creating Submission Date: Pending

Submit For Review **Delete**

1 Set Review Type 2 Upload Documents 3 Submission Checklists 4 Notes

Select a review type:

Selecting a Review Type



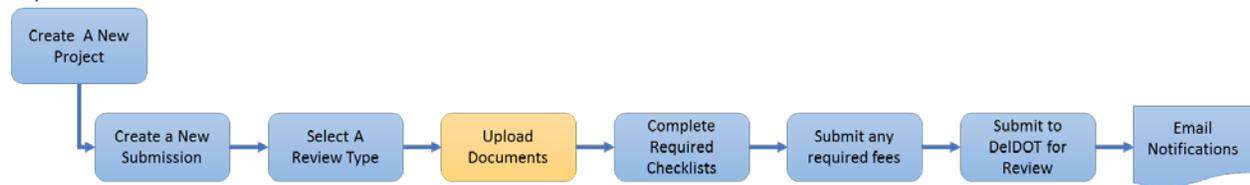
Once a new submission has been created, the next step is to select the review type for the submission. There is only one review type available per submission. For a specific project type the types of reviews available are as follows:

<i>Project Type</i>	<i>Available Review Types</i>
<i>LONC</i>	LONC / PEC
<i>Minor</i>	Minor Residential Subdivision Lot Line Adjustment
<i>Major</i>	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:**
- Select the appropriate review type for this submission. Only one review type is allowed per submission. If multiple review types are needed, a separate submission must be created for each review type.

The screenshot shows a web interface for an 'Unsubmitted' submission. At the top, it displays 'Status: Creating' and 'Submission Date: Pending'. There are two buttons: 'Submit For Review' (green) and 'Delete' (green). Below these are four numbered steps: 1. Set Review Type, 2. Upload Documents, 3. Submission Checklists, and 4. Notes. The 'Set Review Type' step is active, showing a dropdown menu with the following options: LONOR / Record Plan, LONO / Recordable Boundary Plat, Commercial Entrance Plan, Subdivision Construction / Entrance, Subdivision Street, TOA Recommendations, TIS Recommendations, Off-site Review, and Industrial Street.

Upload Documents

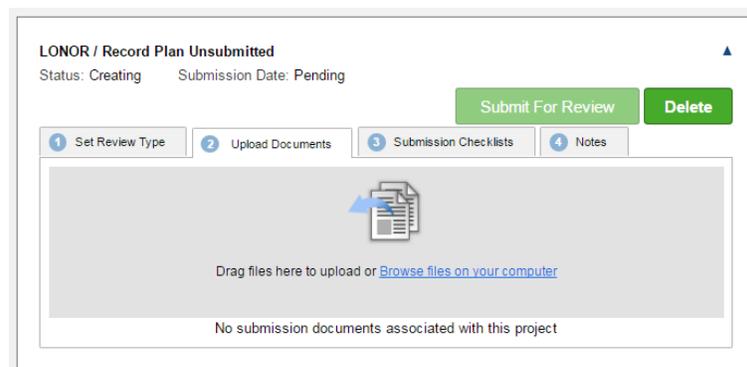


With the new submission created, and the review type selected, the next step is to upload the documents associated with the review type for this submission. A couple of key points regarding the files to be uploaded

- 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.

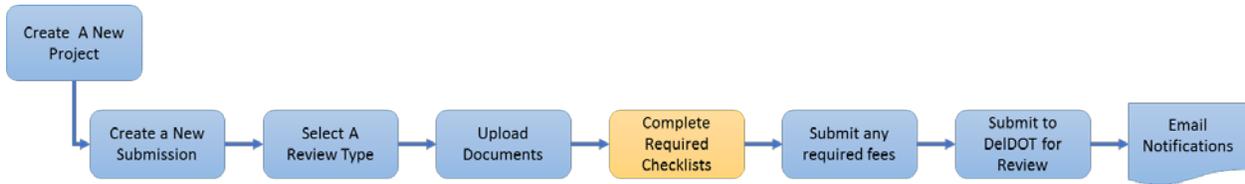
Once the documents are ready,

- 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:

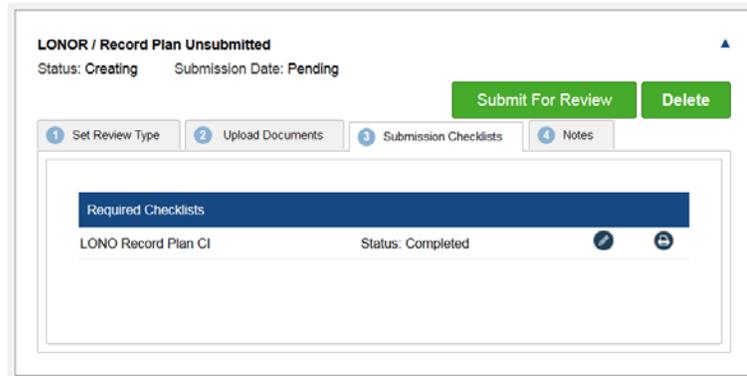
- A checklist can be edited by clicking on 
- A checklist can be printed by clicking on 

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.

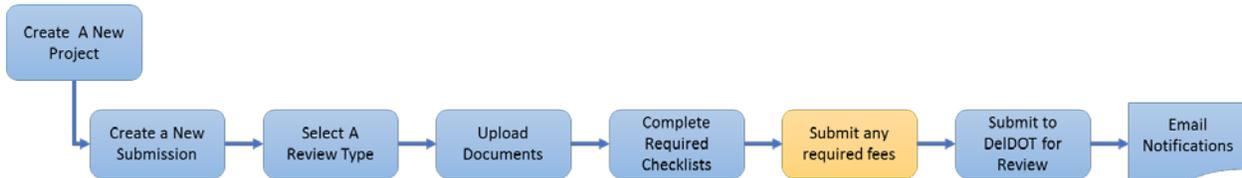
To complete the checklist review

- 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**

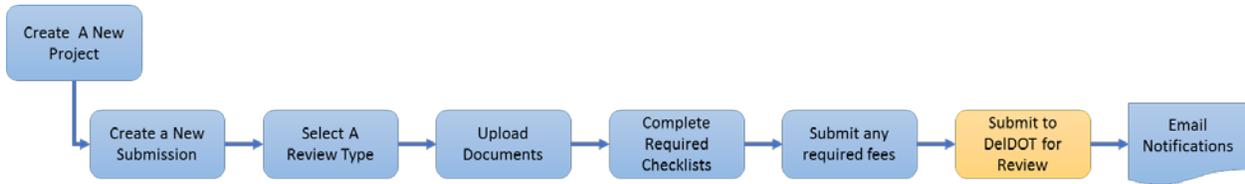


Submit Any Required Fees (Optional)



With the checklists completed, the last remaining step prior to completing the submission process is to submit any required fees. The online payment processing steps have not changed with this update to the PDCA. The process will follow the same steps as the previous versions.

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.

LONOR / Record Plan Unsubmitted
Status: Creating Submission Date: Pending

[Submit For Review](#) [Delete](#)

1 Set Review Type 2 Upload Documents 3 Submission Checklists 4 Notes

Select a review type:
LONOR / Record Plan

- The submission will move from Creating to Submitted and display the date of the submission.

LONOR / Record Plan 2
Status: Submitted Submission Date: 03/20/2017

1 Review Type 2 Documents 3 Submission Checklists 4 Notes

Requested Review Type:
LONOR / Record Plan

- On the project list page, the submission will be shown as Submitted

General Test wlp [View / Edit](#)

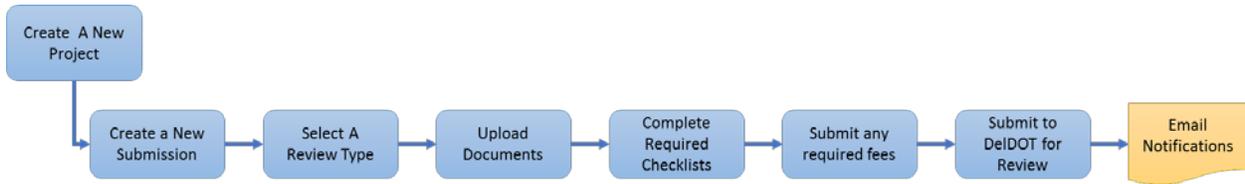
Protocol Tax Parcel #: 1402400026 Project Type: Major Subdivision

Submissions

■ LONOR / Record Plan 2, 03/20/2017	■ Commercial Entrance Plan 3, 03/14/2017
■ Commercial Entrance Plan 2, 03/14/2017	■ Commercial Entrance Plan 1, 03/09/2017
■ LONOR / Record Plan 1, 02/27/2017	

Under Review Legend

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 the following information:

Submission Information:

Original Submission Date

3/20/2017

Project Name

General Test wlp

Engineering Organization

Quadrilateral Engineers

Engineering Contact

Mr. Larry Parallelogram

Developer Organization

Curve Development

Developer Contact

Mr. Colin Cosine

Project Type

Major Subdivision Review Type: LONOR / Record Plan

Submission #

2

Project Url / Name

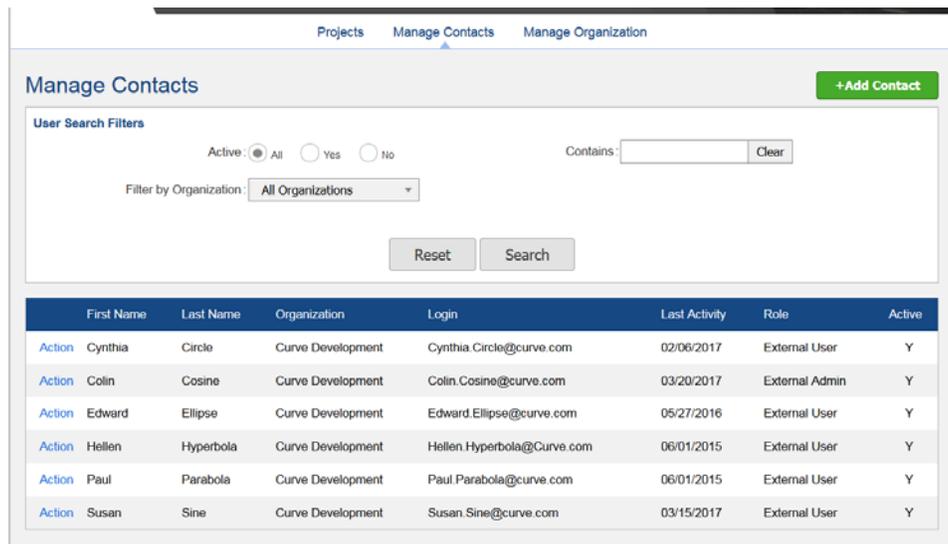
[General Test wlp](#) (Hyperlink to the project in the PDCA

External Administrators – Manage Contacts

New to this release of the PDCA, external organizations can 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



	First Name	Last Name	Organization	Login	Last Activity	Role	Active
Action	Cynthia	Circle	Curve Development	Cynthia.Circle@curve.com	02/06/2017	External User	Y
Action	Colin	Cosine	Curve Development	Colin.Cosine@curve.com	03/20/2017	External Admin	Y
Action	Edward	Ellipse	Curve Development	Edward.Ellipse@curve.com	05/27/2016	External User	Y
Action	Hellen	Hyperbola	Curve Development	Hellen.Hyperbola@Curve.com	06/01/2015	External User	Y
Action	Paul	Parabola	Curve Development	Paul.Parabola@curve.com	06/01/2015	External User	Y
Action	Susan	Sine	Curve Development	Susan.Sine@curve.com	03/15/2017	External User	Y

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

