



# OSHPD e-Services Portal

*Public User Guide*

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Version Number: 8.0

## **Section 4 – Account Management, Association and Delegation**

## 1 Introduction

**Welcome to OSHPD Electronic Services Portal Client Access (eCA) User Guide.** This user guide provides step-by-step instructions for managing the information in your Public User Account and gives step-by-step instructions on associating your professional license to your account and delegating other public users with your authorities.

## 2 Account Management

Public users can perform various tasks to manage their public user accounts in eCA. In order to do so, the public user must first log in to their account in eCA. Then click on the “Account Management” link to view and edit the account information.

Figure 2: Account Management link



### 2.1 Login Information

Under the Login Information section, click on the “Edit” button to update the public user account login information. A pop-up window will appear to make any changes.

Figure 2.1(1): Account Management link

Figure 2.1(2): Update Login Information

In the pop-up window, public users can update any of their information with the exception of “User Name”. When all of the desired changes are complete, click the “Save” button to save your updates. Click on “Cancel” to cancel the updates. See Figure 3.

## 2.2 Contact Information

Under the “Contact Information” section, click on the Actions link then “View” to update the Public User Account contact information, such as address and phone numbers. A pop-up window will appear to make changes.

Figure 2.2(1): Contact Information

First Name	Middle Name	Last Name	Business Name	Contact Type	Status	Action
John		Smith	OSHPD	Individual	Approved	<a href="#">Actions</a> <ul style="list-style-type: none"> <li><a href="#">View</a></li> <li><a href="#">Set as Account Owner</a></li> </ul>

Figure 2.2(2): Update Contact Information

Validate and update your contact information at this page.

### Contact Information

\* First:  Middle:  \* Last:

Name of Business:  Title:

\* Address Line 1:

\* City:  \* State:  \* Zip:  Country:

Work Phone:  Mobile Phone:  Fax:

E-mail:

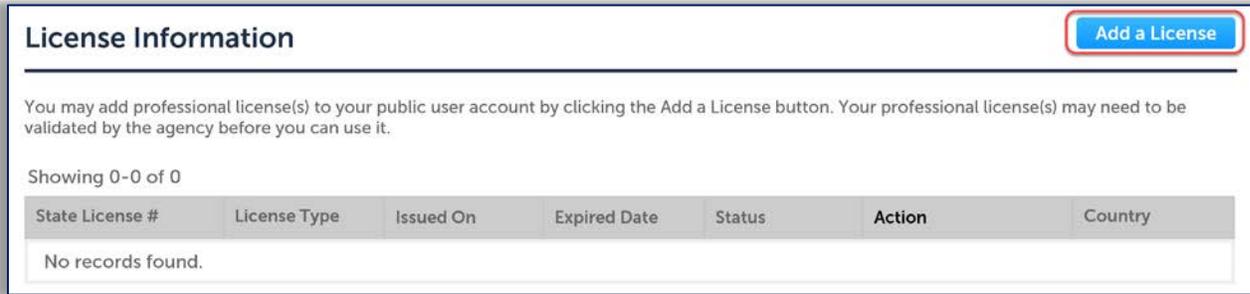
[Save](#) [Back to Account Management](#)

## 3 Associating a Professional License to the Account

Registered Public Users that are properly associated with their professional licenses have the added benefits of creating and submitting project applications, obtaining building permits, paying application fees, access to invoices and receipts, checking on the status of pending activities, uploading electronic plans and documents, and more. In order to associate a professional license to a Public User account,

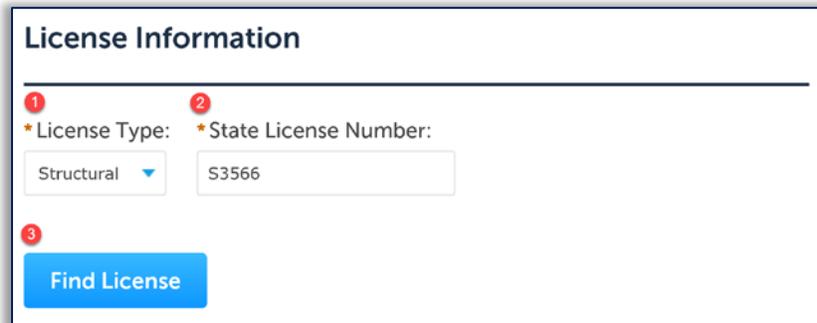
the license record must be a valid license existing in OSHPD database and must match the contact information – licenses cannot be associated to other unlicensed users. To associate your account to your professional license (Architect, Engineer, Contractor, Inspector), click the “Add a License” button under License Information. See Figure 6. Figure 1: Add a License

Figure 3(1): Associating a Professional License



Select the “License Type” and enter a valid “State License Number” to find the license.

Figure 3(2): Associating a Professional License



The following prefixes are required in order for the system to find your license:

- Architect: **C**
- Civil Engineer: **CE**
- Electrical Engineer: **E**
- Mechanical Engineer: **M**
- Structural Engineer: **S**
- Geotechnical Engineer: **GE**
- Certified Engineering Geologist: **EG** Geologist: **GEO**
- Contractor: **No Prefix**
- Owner/Builder Contractor: **OB**
- IOR: **A, B, or C**

Once the license record is found, click on the “Connect” link to associate it to your account. A pop up window will appear - click on “OK” to confirm the selection. See Figure 3(4).

Figure 3(3): Associating a Professional License

License Number	Type	Name	Action
S3566	Structural	Joseph L La Brie	<a href="#">Connect</a>

Figure 3(4): Associating a License

**Adding a License:**

**License Information**

Showing 1-1 of 1

License Number	Type	Name	Action
S3566	Structural	Joseph L La Brie	<a href="#">Connect</a>

[Search Again »](#)

Message from webpage

Do you want to associate this license to your account?

Figure 3(5): Email notification of licensed professional association

When a license is associated to a Public User account, eCA will send the public user an email notification. The association of the professional license to the account must be approved by OSHPD. Figure 3(5) is a sample of the email that you will receive:

**Subject:** A Licensed has been associated to your OSHPD eCA account

John Smith,

You have added a professional license to your OSHPD eCA user account. OSHPD must approve this association before it becomes active. You will not be notified when the association is approved.

**Account Information Details:**  
 User ID: johnsmith  
 User Name: John Smith  
 Business Name: OSHPD  
 Address: 400 R Street, Sacramento, CA 95811

**Associated Licensed Professional:**  
 License Number: C16028  
 License Type: Architect

If you have any questions about this email, please contact OSHPD at (916) 440-8484.

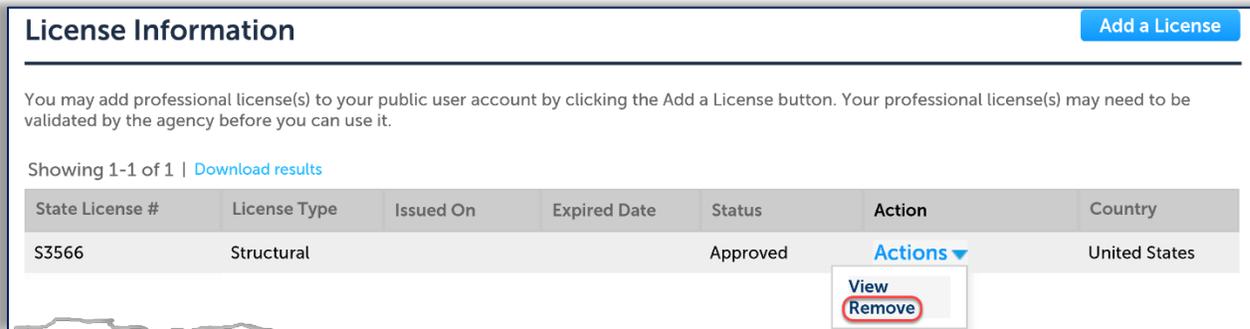
Thank you.

eCA eCA Access Manager  
 Phone: (916) 440-8484  
 E-mail: [eCA.AccessManager@oshpd.ca.gov](mailto:eCA.AccessManager@oshpd.ca.gov)

### 3.1 Deleting a Professional License from the Account

To delete a license that has been previously associated to your Public User account, in the License Information section of Account Management, click the “Actions” dropdown menu and then **Remove** to delete the license. See Figure 3.1.

Figure 3.1: Remove a License



## 4 Delegates

### 4.1 Delegate Overview

If you are the Legal Owner Designee and your account has been associated to one or more facilities, you may enable other members of your team, such as project managers, construction managers, administrative assistants, etc., to act on projects at your facility(s) by adding their user account as delegates to your account. Until you delegate other users, only you will be able to submit completed applications to OSHPD, pay application fees, have access to invoices and receipts, check on the status of in-progress applications, etc. However, any Delegates you approve will have the same authorizations that you have.

If you are a Licensed Professional (Architect, Engineer, Contractor, Inspector), you may enable other members of your team, such as Alternates, administrative assistants, etc., to act on your behalf by adding their user account as delegates to your account. This will allow you and your delegates to create project applications for new projects, alternate methods of compliance and post-approval documents online and to submit them to the Facility Representative for approval and submission to OSHPD.

To delegate another public user, the user must have already created a Public User Account and you must know the email address they entered when they created their account. The Delegates section of Account Management displays users who are added to your account and users who added you to their accounts.

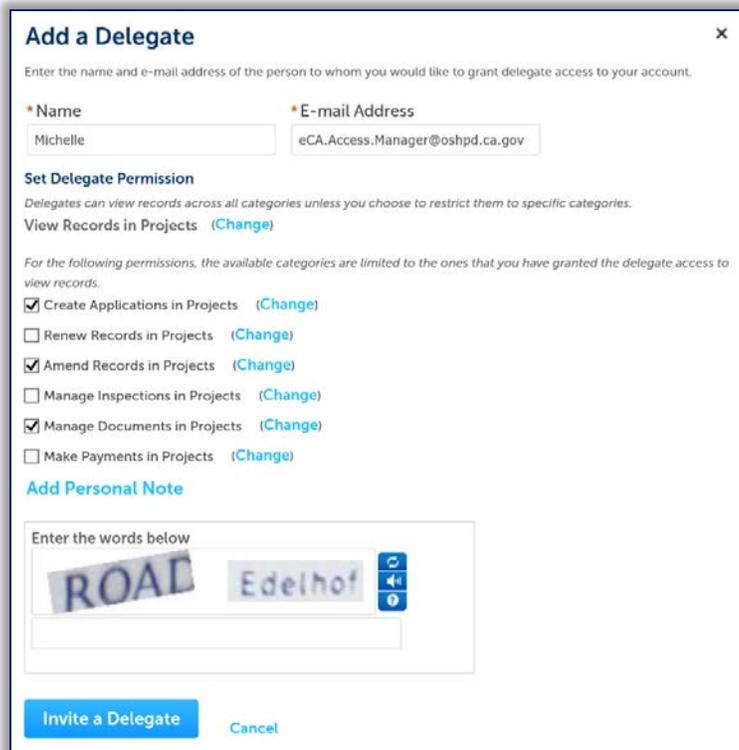
## 4.2 Add a Delegate

Click the “Add a Delegate” button to start managing your delegations. A pop-up window appears for user to designate the delegation permissions. See Figure 4.2(1).

Figure 4.2(1): Add a Delegate



Figure 4.2(2): Delegates



Enter the name that identifies the delegate to you – it does not need to match the user ID – and the e-mail address of the delegate. **The e-mail address must be the address delegate registered with for his or her eCA account.** After selecting appropriate delegate permission, enter the words displayed in the CAPTCHA window then click on “Invite a Delegate” button. See Figure 4.2(2).

Figure 11: Add a Delegate

### 4.3 Delegate Permissions

In the “Set Delegate Permission” section, select the appropriate permissions. Below is a list of delegate permission descriptions.

**Create Applications in Projects:** Select this checkbox to allow delegate to create applications for new projects on your behalf.

**Renew Records in Projects:** This permission is currently not used for OSHPD eCA.

**Amend Records in Projects:** Select this checkbox to allow delegate to create amendments such as PADs, AMCs or Building Permits for an existing project.

**Manage Inspections in Projects:** This permission is currently not implemented by OSHPD eCA.

**Manage Documents in Projects:** Select this checkbox to allow delegate to upload electronic plans and document in the Attachments section of the project record.

**Make Payments in Project:** Select this checkbox to allow delegate to select application fee payment method and pay fees online.

After selecting the delegate permission and inviting the delegate, you will have the option to change the delegate’s permissions.

Figure 4.3(1): Delegates

Click on “View Invitation” link. A pop-up window will appear to facilitate any needed permission change(s).



Figure 4.3(2): Manage Delegate Permissions

### Manage Delegates

Michelle (eca.access.manager@oshpd.ca.gov)  
*Invitation sent on 10/30/2016*

Allow this delegate access to the following

View Records in Projects [\(Change\)](#)

- Create Applications in Projects [\(Change\)](#)
- Renew Records in Projects [\(Change\)](#)
- Amend Records in Projects [\(Change\)](#)
- Manage Inspections in Projects [\(Change\)](#)
- Manage Documents in Projects [\(Change\)](#)
- Make Payments in Projects [\(Change\)](#)

[Save Changes](#) [Cancel](#)

#### 4.3.1 Accept or Reject Delegate Invitation

As soon as you add a delegate to your Public User account, eCA sends an email to the delegate notifying them of the invitation. Below is a sample of the email that the delegate receives:

Figure 4.3.1(1): eCA Delegation Invitation Email

An OSHPD eCA user, John Smith, has added you as a delegate. Please log in to your account at <https://eserv.oshpd.ca.gov/CitizenAccess/> to accept or reject the delegation invitation.

If you have questions or experience any issues, contact us at [eserv@oshpd.ca.gov](mailto:eserv@oshpd.ca.gov).

Thank you.

The delegate must log-in to eCA and open the “Account Management” section. Under the Delegate section, the invitation is displayed. The delegate must accept or reject the delegate invitation.

Figure 4.3.1(2): Delegation Invitation

### Delegates [Add a Delegate](#)

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People who can access my account  
*None*

People whose account I can access

John Smith (Gary.Dunger@oshpd.ca.gov) Invitation received on 10/30/2016	<a href="#">Accept</a> <a href="#">Reject</a>
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Authorities from the delegator are not conferred to the delegate until the invitation is accepted. The delegator can review the permissions, edit the permissions or remove delegate at any time. Click on “Actions” as shown below to perform above tasks.

Figure 4.3.1(3): View/Remove Delegate Permissions

People who can access my account

Gary (gdunger@oshpd.ca.gov)  
Last accessed account on 10/30/2016

Michelle (eca.access.manager@oshpd.ca.gov)  
Invitation sent on 10/30/2016

[Add a Delegate](#)

People whose account I can access  
None

**Actions** ▾

- View Permissions
- Edit Permissions
- Remove

### 4.3.2 Delegate Effect

After accepting the delegate invitation, the delegate’s project list will display all of the projects that were created by or associated to the delegator. Based on the delegation permission, the delegate can create a new project, a PAD, AMC, or Building Permit, upload plans and documents, pay fees and resume applications that are in-progress.

Figure 4.3.2: Projects Tab

Projects								
Showing 11-20 of 100+   <a href="#">Download results</a>   <a href="#">Add to collection</a>								
<input type="checkbox"/>	Date	Project Number	Project Type	Project Name	Status	Related	Action	Sh
<input type="checkbox"/>	10/20/2016	<a href="#">S132760-37-00-ACD0024</a>	Post Approval Document	Thornton Hospital Autopsy and Materials Management Renovation	Pending	26	<a href="#">Pay Fees Due</a>	
<input type="checkbox"/>	10/20/2016	<a href="#">IS091547-0-ACD1257</a>	Post Approval Document	LPCH EXPANSION PROJECT	Open	1	<a href="#">Pay Fees Due</a>	
<input type="checkbox"/>	10/19/2016	<a href="#">S162029-37-00-BPT01</a>	Application for Building Permit	MC16055 SCVC Patient Kiosks installation	Approved	2		
<input type="checkbox"/>	10/19/2016	<a href="#">S162639-37-00</a>	Application for New Project	MC16016 Emergency waiting room 1-401 low wall addition	Open	0	<a href="#">Pay Fees Due Amendment</a>	