

Builder Services Portal



User Guide



April 2024

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Quick-Start Guide



Logging In

Go to: <https://www.sdge.com/builder-services/track>

Creating an Account

The Portal Landing Page

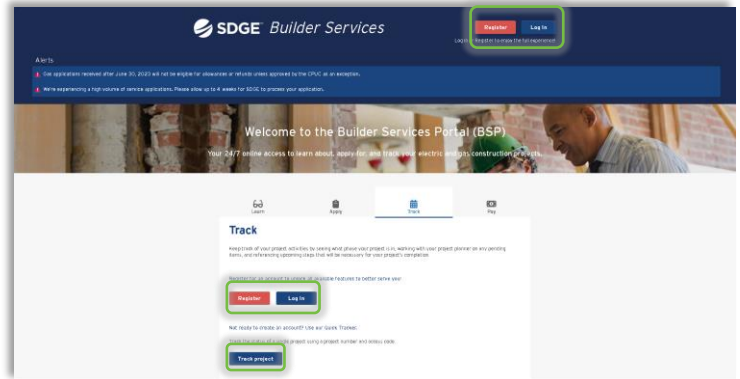
On the Builder Services home page, you can register for a new account or login to an existing account.

Using a login account will provide opportunity to:

- Submit new requests that will automatically be associated with your account
- Create a dashboard portfolio to view progress on all of your projects.

Alternatively, you can access a single project without an account by entering the Project or Job number and Access Code. *You should have received your Access Code in your Welcome Package from SDG&E.* *

Once information is entered, click the **Track** button. Should you decide to not create an account, further instruction on the project tracker can be found in the **Project Status Tracker** section of this document.



**NOTE: If you do not have your project number or access code, please reach out to your SDG&E Planner or Coordinator.*

Register

Register for an Account

Click the “Register” button in the top right corner of the landing page and then enter your account information.

It is important to select an **e-mail address that you would like to use for the duration of your account.**



Your e-mail address will become your username and will **not be able to be changed later.**

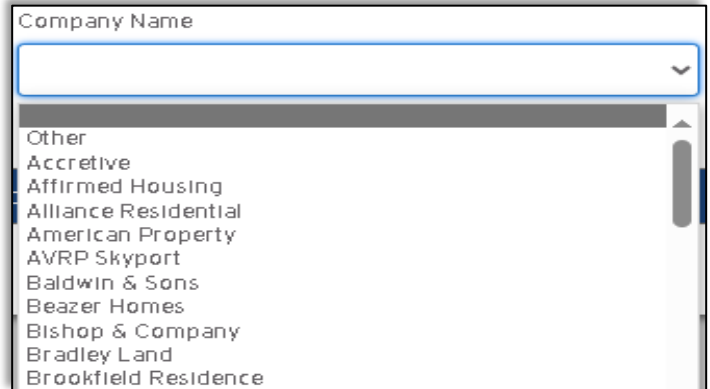
(Should you need to change your e-mail later, you will need to create a new account).

Creating an Account, continued

Selecting Your Company

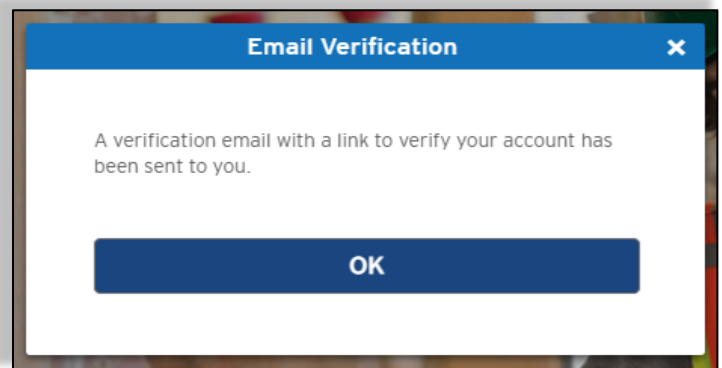
Select your company name from the dropdown list.

If your company is not listed, select Other. Selecting Other will prompt a secondary box for you to type in the name of your company.

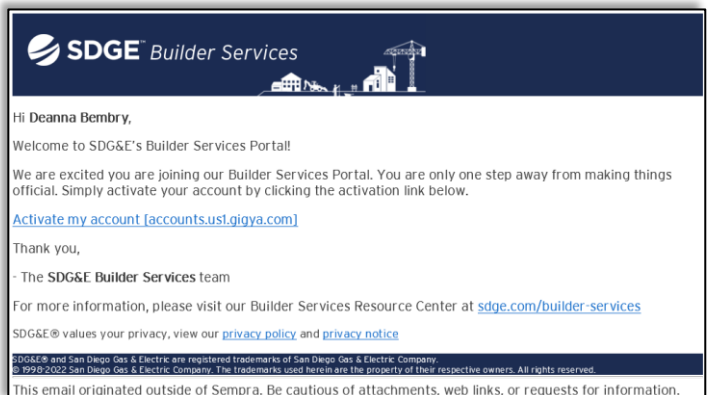


Verify Your Account

Once you submit your account information, you will be sent an email verification.



Once you receive the verification e-mail, click the link to activate your account.



Project Dashboard

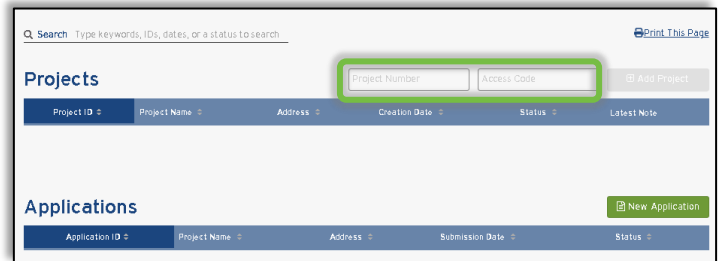
Adding Projects to the Dashboard

When first accessing your account, the dashboard will be empty.

You will need to enter a Project or Job number and Access Code. You should have received your **Project # and Access Code from an SDG&E planner or coordinator.**



Once information is entered, click the **Add Project** button.

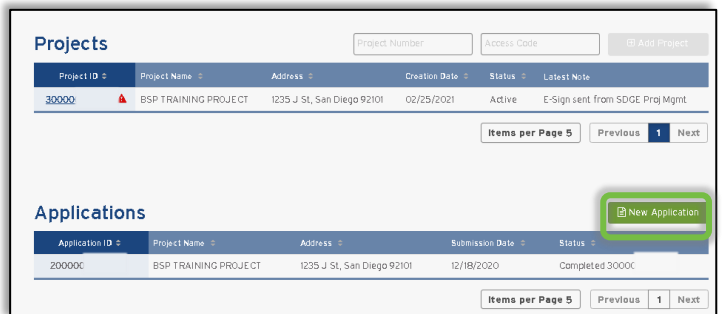


Applications in the Dashboard

To submit a new service request, click **New Application**.

Applications submitted while logged in will automatically be reflected on your dashboard.

Any applications submitted while not logged in will not be visible in your account and cannot be added to your dashboard.



Project Dashboard

Project Information

The Dashboard page will display the following for projects & applications:

- Project ID or Application ID
- Project name
- Address
- Creation Date
- Status
- Latest Note

The screenshot shows the Project Dashboard interface. At the top, there are search filters for 'Project Number' and 'Access Code', and an 'Add Project' button. Below this is a 'Projects' table with columns: Project ID, Project Name, Address, Creation Date, Status, and Latest Note. The first row shows Project ID 300000, Project Name BSP TRAINING PROJECT, Address 1235 J St, San Diego 92101, Creation Date 02/25/2021, Status Active, and Latest Note E-Sign sent from SDGE Proj Mgmt. Below the Projects table is an 'Applications' table with columns: Application ID, Project Name, Address, Submission Date, and Status. The first row shows Application ID 200000, Project Name BSP TRAINING PROJECT, Address 1235 J St, San Diego 92101, Submission Date 12/18/2020, and Status Completed 300000. There are pagination controls for both tables, showing 'Items per Page 5' and 'Previous 1 Next'.

Applications becoming Projects

When applications are processed by SDG&E and become approved projects, the Status column under

Applications will display the new Project ID 300000----. The project will also be listed under

Projects with its new Project Number.

This screenshot is similar to the previous one but highlights the transition of an application to a project. In the 'Projects' table, the Project ID '300000' is highlighted with a green box. In the 'Applications' table, the Status 'Completed 300000' is highlighted with a green box. The rest of the interface, including search filters and pagination, remains the same.

Project Summary Page

Project Tracking Information

The Project page will display the following:

- Project start date
- Latest Updated Job #
- Project Updated Date
- Project # & Access Code
- Primary Customer & phone number
- Project Notes
- Phase the job is in
- Status details



Alert messages will display if pending information is required from the customer.

When the job is energized, the phase column will say **Complete**.

NOTE: the Project Number and Access Code can be shared with other interested parties to give them visibility to the project

BSP TRAINING PROJECT

Start Date: 02/26/2021 | Project Number: 30000
 Latest Updated Job: 30000 | Access Code:
 Updated On: 10/12/23 by: SDGE Employee | Customer: Important Customer 123-512-0046

Project Notes

Date	From	Subject	Note
06/18/2023 09:35 AM	Kelly Dyer	E-Sign sent from SDGE Proj Mgmt	Hi Jackie - We have sent you the contracts to sign via E-sign...please electronically sign for your project to proceed. Thanks, Kelly

Alert: One or more jobs need your attention. Please review the Status Details for more information.

Distribution Jobs

Job Number	Address	Description	Phase	Status Details
30000	1235 J St	Underground Residential	Preliminary Engineering and Design	Pending Prelim return
30000	1235 J St	Overhead Development Residential	Preliminary Engineering and Design	Preliminary Design Pending
30000	1235 J St	Gas Residential	Preliminary Engineering and Design	Preliminary Design Pending

Click the **Phase Question Mark (?)** to see details for each phase.

Review details for each job by clicking on the job number.

Distribution Jobs

Job Number	Address	Description	Phase	Status Details
30000	1235 J St	Underground Residential	<ul style="list-style-type: none"> Initiate Preliminary Engineering & Design Final Design Pre-Construction Construction 	Pending Prelim return
30000	1235 J St	Overhead Development Residential	Preliminary Engineering and Design	Preliminary Design Pending
30000	1235 J St	Gas Residential	Preliminary Engineering and Design	Preliminary Design Pending
30000	1235 J St	Overhead Residential Dist.	Initiation	Engineering Fee Pending
30000	1235 J St	UG Development Residential	Preliminary Engineering and Design	Preliminary Design Pending

Project Summary Page

Project Notes

Project Notes displays supplemental information regarding your project. These notes are created by your SDG&E planner or coordinator.

The details displayed are:

- Project Note Creation Date
- SDG&E Employee
- Project Note Subject
- Project Note

BSP TRAINING PROJECT

Start Date: 02/26/2021 | Project Number: 30000
 Latest Updated Job: 30000 | Access Code
 Updated On: 06/18/2023 by: SDGE Employee | Customer: Important Customer 123-513-0046

Project Notes [View All Project Notes](#)

Date	From	Subject	Note
06/18/2023 09:35 AM	Kelly Dyer	E-Sign sent from SDGE Proj Mgmt	Hi Jackie - We have sent you the contracts to sign via E-sign...please electronically sign for your project to proceed. Thanks, Kelly

▲ One or more jobs need your attention. Please review the Status Details for more information. **Sort By:** Job Number

Distribution Jobs

Job Number	Address	Description	Phase	Status Details
300000	1235 J St	Underground Residential	Preliminary Engineering and Design	▲ Pending Prelim return
300000	1235 J St	Overhead Development Residential	Preliminary Engineering and Design	Preliminary Design Pending
300000	1235 J St	Gas Residential	Preliminary Engineering and Design	Preliminary Design Pending

When there is more than one project note available, simply click **View All Project Notes** to review all notes.

**NOTE: Project Notes may also be sent as emails to the primary contact listed on the account.*

BSP TRAINING PROJECT

Start Date: 02/26/2021 | Project Number: 30000
 Latest Updated Job: 30000 | Access Code
 Updated On: 06/18/2023 by: SDGE Employee | Customer: Important Customer 123-513-0046

Project Notes [Search](#) Type keywords, IDs, dates, or a status to search.

Date	From	Subject	Note
06/18/2023 09:35 AM	Kelly Dyer	E-Sign sent from SDGE Proj Mgmt	Hi Jackie - We have sent you the contracts to sign via E-sign...please electronically sign for your project to proceed. Thanks, Kelly
06/18/2023 08:50 AM	System	Missing Documents/Information	Please send all the documents related to Project for validation and approval
06/18/2023 08:44 AM	System	Attempted to contact you	Please try calling back to SDGE planner for discussion

Job Details

Click on the job number to see the job's details.

Information contained on this page:

- Description of the current phase
- Information requested from SDG&E (only if necessary)
- Status of each milestone

Dashboard | Project Summary Print This Page

EQ1 TRAINING PROJECT

Job Description: Overhead Residential Dist. Project Number: 30000
 Job Last Updated on: 03/17/2021 by: SDGE Employee Job Number: 30000
 Customer: CUSTOMER Hull 858-225-2021

SDG&E Project Manager
 SDGE Employee
 619-123-4567

Trench Desk/Inspections
 Southern Region
 619-699-1032

⚠ Pending Engineering Fee payment. If paid, allow 3 business days for processing.

1 Initiation (Current Phase)

During the initiation phase, SDG&E will request all required documents and collect needed fees to formally submit your project for Planning & Engineering.

- ✓ Project Request Received 02/26/2021
- ✓ Customer Welcome Package Sent 02/25/2021
- ⚠ Engineering Fee Pending Payment

All Required Information Pending

2 Preliminary Engineering and Design

3 Final Design

4 Pre-Construction

5 Construction

To view details and milestones for each phase, you can expand the arrow for the particular phase.

Green check marks indicate information has been received and completed by the customer and/or SDG&E.

A red alert will display information that is pending from the customer and/or SDG&E.

Dashboard | Project Summary Print This Page

EQ1 TRAINING PROJECT

Job Description: Overhead Residential Dist. Project Number: 30000
 Job Last Updated on: 03/17/2021 by: SDGE Employee Job Number: 30000
 Customer: CUSTOMER Hull 858-225-2021

SDG&E Project Manager
 SDGE Employee
 619-123-4567

Trench Desk/Inspections
 Southern Region
 619-699-1032

⚠ Pending Engineering Fee payment. If paid, allow 3 business days for processing.

1 Initiation (Current Phase)

During the initiation phase, SDG&E will request all required documents and collect needed fees to formally submit your project for Planning & Engineering.

- ✓ Project Request Received 02/26/2021
- ✓ Customer Welcome Package Sent 02/25/2021
- ⚠ Engineering Fee Pending Payment

All Required Information Pending

Job Completion When the job is energized, all phase boxes will be displayed in blue and you'll see the word **Completed**.

Definition of **Completed**:

Distribution and Service work – system energized

Master Service Orders – all meters have been set

Job Number	Address	Description	Phase	Status Details
300000	1235 J St	OH Rewire OS	Create SDG&E work request	■ ■ ■ ■ ⚠ Pending Project Payment
300000	1235 J St	R16 RESD AND NON RESD US	Pre-Construction	■ ■ ■ ■ Pre-Con Approval Pending
300000	306 WALNUT AVE	OH R16 ELEC VEHICLE RES OS		■ ■ ■ ■ Completed
300000	1235 J St	Gas R16 Gas Service Removal	Create SDG&E work request	■ ■ ■ ■ Work Order Pending
300000	17030 ROBLE WAY	R16 Rewire Upgrade	Construction	■ ■ ■ ■ Construction Pending

Quick-Start Guide



Permitting Information

If your job requires SDG&E to obtain a permit, you will see a **Permitting** section in the Job Details page.

Click on the **View Details** button next to Permitting to see the Permit Details.

My permit test

Job Description: My permit test4
 Job Last Updated on: 10/26/2023 by: SDG&E Employee

Project Number: 300000
 Job Number: 300000
 Customer: Customer Name | 123-123-1234

Permitting: [View Details](#)

SDG&E Project Manager
 SDG&E Employee
 619-123-4567

Trench Desk/Inspections/SOT
 Southern Region
 619-699-1039

The Permit Details page will display a table listing the following:

- Job Number
- Permit Agency
- Permit Status
- Permit Number
- Permit Expiration Date
- Date of Status

Permit Status denotes who is working on the permit (SDG&E or the Issuing Agency).

Status Options

There may be various statuses in the Permit Status column:

- In Progress with SDG&E
- In Progress with Issuing Agency
- Permit Issued
- No Permit Required
- No Right of Way Permit Required

Dashboard | Project Summary | Job Details Print This Page

My permit test

Job Description: My permit test4
 Job Last Updated on: 10/26/2023 by: SDG&E Employee

Project Number: 300000
 Job Number: 300000
 Customer: Customer Name | 123-123-1234

Permit Details

Job Number	Agency	Permit Status	Permit Number	Expiration	Date of Status
300000	Caltrans north of 56	In Progress with SDG&E			10/05/2023
300000	City of San Diego	In Progress with SDG&E			10/05/2023
300000	County of San Diego north of 56	Permit Issued	Permit 99	11/11/2023	10/26/2023
300000	Alpine	In Progress with SDG&E			10/05/2023
300000	Carlsbad	In Progress with SDG&E			10/05/2023
300000	Coronado	Permit Issued	permit 12	11/13/2023	10/20/2023
300000	Aliso Viejo	In Progress with SDG&E			10/05/2023
300000	County of Orange	In Progress with SDG&E			10/05/2023
300000	Dana Point	In Progress with SDG&E			10/05/2023
300000	El Cajon	In Progress with SDG&E			10/05/2023
300000	Escondido	In Progress with SDG&E			10/05/2023
300000	Chula Vista	In Progress with SDG&E			10/05/2023

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Job Completion When the job is complete, all phases are collapsed.

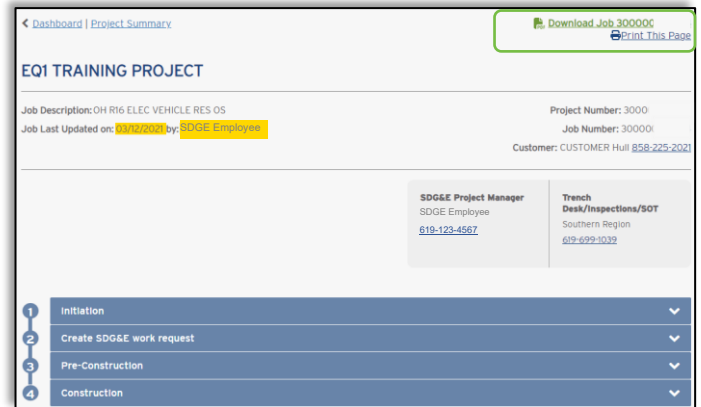
Click on any arrow to view completed milestones for each phase.

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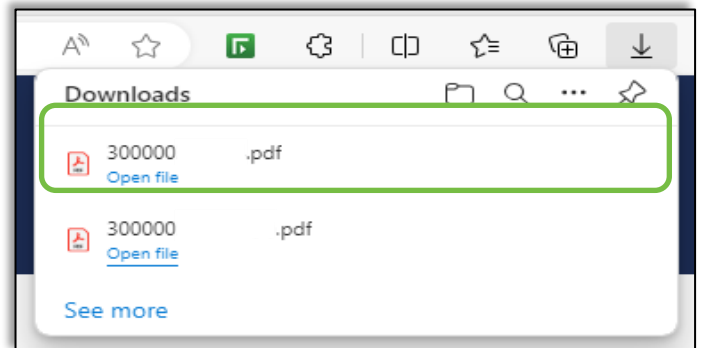
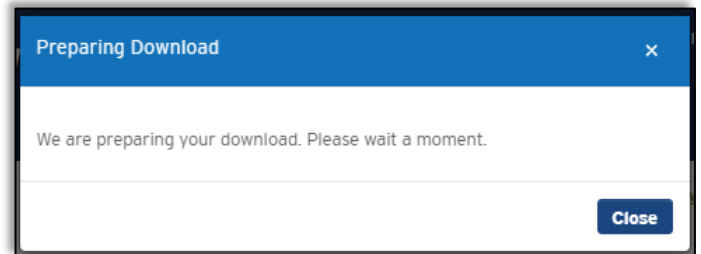


Download Service Order

When the Service job is complete, you can download the Service Order Document from the top right-corner of the Job Details screen.



A Preparing Download pop-up will appear before your file will be present in your Downloads folder.



You can also download the Service Order document from the Project Summary screen in the Service Jobs section.

Simply click the PDF icon in the far-right column.

Job Number	Address	Description	Phase	Status Details	
300000	1235 J St	OH Rewire OS	Create SDG&E work request	Pending Project Payment	
300000	1235 J St	R16 RESD AND NON RESD US	Pre-Construction	Pre-Con Approval Pending	
300000	306 WALNUT AVE	OH R16 ELEC VEHICLE RES OS		Completed	
300000	1235 J St	Gas R16 Gas Service Removal	Create SDG&E work request	Work Order Pending	
300000	17030 ROBLE WAY	R16 Rewire Upgrade	Construction	Construction Pending	

Quick-Start Guide



Master Service Orders

Access information about your master service orders on the Project Summary Page. If your project has both gas and electric, each will have its own job notification number.

Job Number	Address	Description	Status Details
30000	Master Services	GAS MASTER SERVICE SUBDIVISION	Cancelled
30000	Master Services	R16 Electric Subdivision	

Meter Details

All addresses associated with the Master Service Order will be listed under the Job Number. You can easily see which milestones have been met and which are pending.

Address for **Subdivisions** will display each lot with the address.

Milestones that have been met will have a green checkmark.

If the billing application has not been received, a message will notify customer to submit an application.

If there is gas with electric, you can view the master service order by clicking the link "View Gas Meters Job #300000..." below the job number.

Lot/Blks	Address	SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
201	2 SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/14/2022 ✓	20000	02/09/2022
202	SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/08/2022 ✓	20000	02/09/2022
203	SOLSTICE WAY	01/26/2022 ✓	01/04/2021 ✓	03/04/2022 ✓	20000	02/09/2022
204	SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/04/2022 ✓	20000	02/09/2022
205	SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/04/2022 ✓	20000	02/09/2022
206	SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/21/2022 ✓	20000	02/09/2022
207	SOLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/11/2022 ✓	20000	02/09/2022
208	SOLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/07/2022 ✓	20000	02/09/2022
209	SOLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/09/2022 ✓	20000	02/09/2022
210	SOLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/09/2022 ✓	20000	02/09/2022

Quick-Start Guide



Export to Excel

Master service order information can be exported to excel from the Job Details screen.

Simply click the Export to Excel button to initiate the download.

BSP TRAINING PROJECT

Gas Meters

Job Description: GAS MSO PA2 W02 :

Job Last Updated on: 03/26/2022 by: SDGE Employee

[View Electric Meters Job#R00000](#)

Project Number: 3000

Job Number: 3000

Customer: BSP User [612-123-4567](#)

Requirements

SDG&E Final Inspection

City/County Release

Meter Energized

SDG&E Project Manager

Trench Desk/Inspections

Southern Region

619-699-1039

Export to Excel

Sort By: Lot/Building

Lot/Bldg	Address	SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
201	OLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/14/2022 ✓	2000	02/09/2022
202	SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/08/2022 ✓	2000	02/09/2022
203	SOLSTICE WAY	01/26/2022 ✓	01/04/2021 ✓	03/04/2022 ✓	2000	02/09/2022
204	OLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/04/2022 ✓	2000	02/09/2022
205	OLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/04/2022 ✓	2000	02/09/2022
206	OLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/21/2022 ✓	2000	02/09/2022
207	OLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/11/2022 ✓	2000	02/09/2022
208	OLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/07/2022 ✓	2000	02/09/2022
209	SOLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/09/2022 ✓	2000	02/09/2022
210	SOLSTICE WAY	01/26/2022 ✓	01/04/2022 ✓	03/09/2022 ✓	2000	02/09/2022

[Load More](#) [Show All](#)

Your data will be formatted in a table in excel as pictured.

Gas	Lot/Bldg	Meter Address	SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
	201	SOLSTICE WAY	1/26/2022	12/16/2021	3/14/2022	2000012345	2/9/2022
	202	SOLSTICE WAY	1/26/2022	12/16/2021	3/8/2022	2000012346	2/9/2022
	203	SOLSTICE WAY	1/26/2022	1/4/2021	3/4/2022	2000012347	2/9/2022
	204	SOLSTICE WAY	1/26/2022	12/16/2021	3/4/2022	2000012348	2/9/2022
	205	SOLSTICE WAY	1/26/2022	12/16/2021	3/4/2022	2000012349	2/9/2022
	206	SOLSTICE WAY	1/26/2022	12/16/2021	3/21/2022	2000012350	2/9/2022
	207	SOLSTICE WAY	1/26/2022	1/4/2022	3/11/2022	2000012351	2/9/2022
	208	SOLSTICE WAY	1/26/2022	1/4/2022	3/7/2022	2000012352	2/9/2022
	209	SOLSTICE WAY	1/26/2022	1/4/2022	3/9/2022	2000012353	2/9/2022
	210	SOLSTICE WAY	1/26/2022	1/4/2022	3/9/2022	2000012354	2/9/2022
	211	SOLSTICE WAY	1/26/2022	1/4/2022	6/8/2022	2000012355	2/9/2022
	212	SOLSTICE WAY	1/26/2022	1/4/2022	3/9/2022	2000012356	2/9/2022
	213	SOLSTICE WAY	3/9/2022	4/6/2022	4/25/2022	2000012357	4/13/2022
	214	SOLSTICE WAY	3/9/2022	4/6/2022	3/28/2023	2000012358	4/13/2022
	215	SOLSTICE WAY	3/9/2022	4/6/2022	9/25/2022	2000012359	4/13/2022
	216	SOLSTICE WAY	3/9/2022	4/6/2022	4/29/2022	2000012360	4/13/2022
	217	SOLSTICE WAY	3/9/2022	4/6/2022	4/27/2022	2000012361	4/13/2022
	218	SOLSTICE WAY	3/9/2022	4/6/2022	4/25/2022	2000012362	4/13/2022
	219	SOLSTICE WAY	4/21/2022	4/5/2022	7/11/2023	2000012363	5/26/2022
	220	SOLSTICE WAY	4/21/2022	4/5/2022	6/27/2022	2000012364	5/26/2022
	221	SOLSTICE WAY	4/21/2022	4/5/2022	6/8/2022	2000012365	5/26/2022
	222	SOLSTICE WAY	8/12/2022	8/4/2022	12/1/2022	2000012366	8/25/2022
	223	SOLSTICE WAY	8/12/2022	8/4/2022	9/7/2022	2000012367	8/25/2022

Quick-Start Guide



Setting Filters

You have the ability to set filters to help with the amount of information displayed. When first accessing this page, make sure to clear all previous filters. You can select the data you want displayed by the following filters:

- Billing Application
 - Received
 - Not Received
- Meter Set
- Premise ID
- Lot/Building
 - SDG&E Inspection
 - City/County Release

Filter Results

Once filters have been applied, only the information requested will display.

Lot/Blidg	Address	SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
201	SOLSTICE WAY	01/26/2022 ✓	12/16/2021 ✓	03/14/2022 ✓	20000	02/09/2022

Quick-Start Guide



Development Job Details

Address for **Developments** display the building number with a + sign. When you click the + sign, the individual units for each building will display.

Lot/Bldg	Address	SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
1101	DERELLA WAY	✓		✓	✓	
1103	DERELLA WAY	✓		✓	✓	
1106	DERELLA WAY	✓		✓	✓	

Lot/Bldg	Address	SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
1101	DERELLA WAY	✓		✓	✓	
	DERELLA WAY	01/20/2022 ✓	01/24/2022 ✓	03/18/2022 ✓	2000i	02/16/2022
	DERELLA WAY HM	01/20/2022 ✓		05/17/2022 ✓	2000i	
	DERELLA WAY	01/20/2022 ✓	01/24/2022 ✓	02/28/2022 ✓	2000i	02/16/2022



Milestones that have been met will have a green checkmark. Those that are pending will have a red triangle, along with a message in red indicating detailed information that is pending.

If a meter has been set, the meter set date will display.

This page also lists the milestones for meter sets.

If you want to set filters, click the Filters button.

SDG&E Final Inspection

SDG&E will provide a Final Inspection once the following requirements are complete:

- Weidshole and trenching dimensions
- Riser location
- Backfill & compaction - Proof of qualification must be provided in the form of a Veriforce Fields Verification Report (FVR) to the SDG&E Inspector

City/County Release

Customer to contact City/County (Authority Having Jurisdiction) to obtain a final inspection of the meter panel.

Meter Energized

SDG&E will energize the meter once the following requirements are complete:

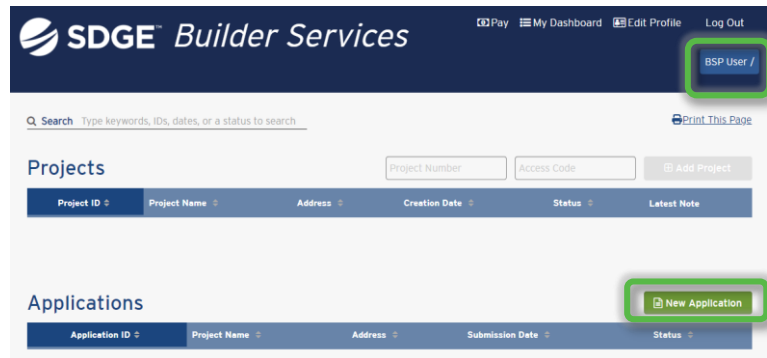
- SDG&E Final Inspection of Site
- SDG&E Construction complete
- City/County Release
- Billing Application received by SDG&E

Uploading Documents

Document Upload Requirements

When logged into the Builder Services Portal, you will have the option to upload project documents to new applications being submitted, applications submitted while logged in, and projects in your dashboard

Ensure you are logged in at the time of submitting an application

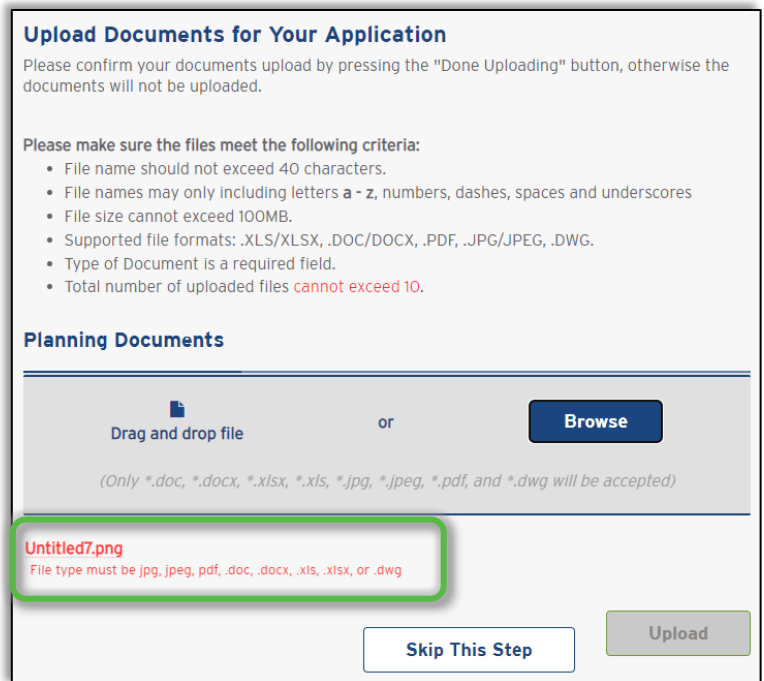


File Criteria

Files must meet the following criteria to be uploaded:

- File name should not exceed 40 characters.
- File name can only include letters, numbers, dashes, underscore, spaces, and periods. No special characters such as * & ^ % \$ # @ ! ()
- File size cannot exceed 100MB.
- Supported file formats: .XLS/XLSX, .DOC/DOCX, .PDF, .JPG/JPEG, .DWG.
- Type of Document is a required field.
- Total number of uploaded files cannot exceed 10.

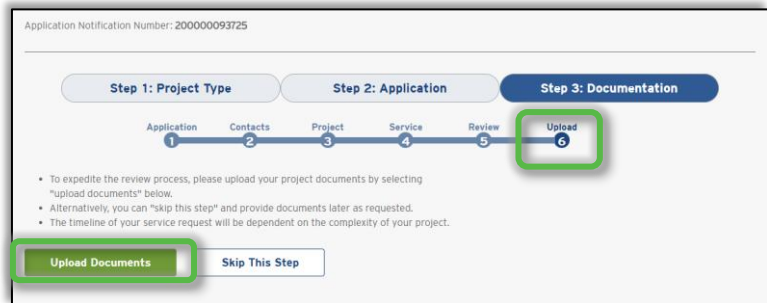
Unsupported files will prompt an error message below your upload documents window.



Uploading Documents with a New Application

Uploading Documents

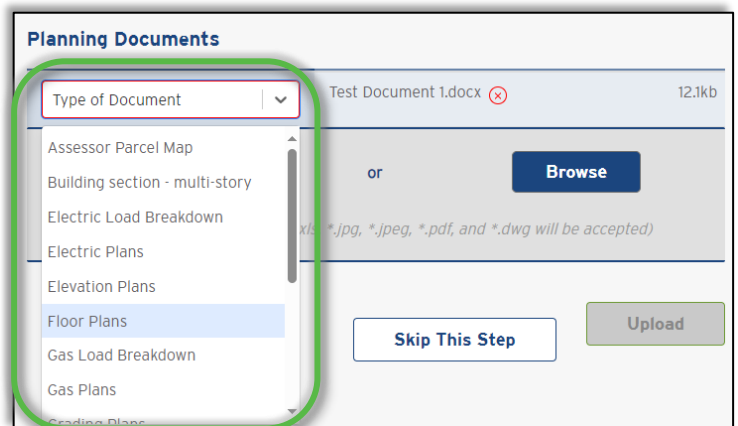
In step 6 of your application, select "Upload Documents" to navigate to the document upload page for your application.



Document Type

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

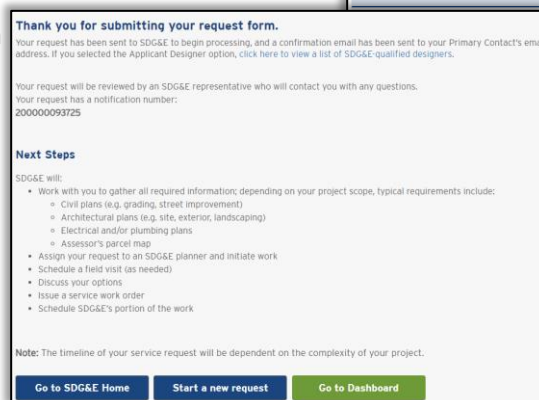
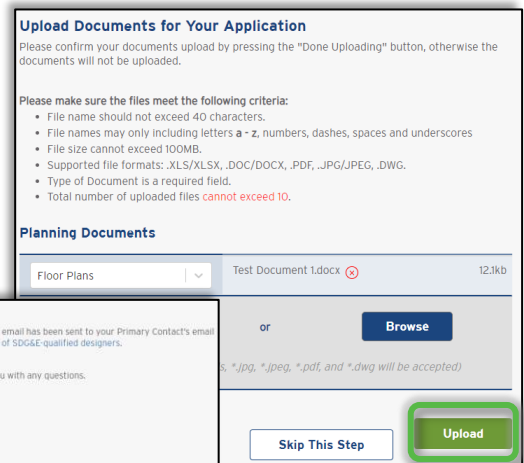


Document Upload Confirmation

Select the "Upload" button once all necessary files have been uploaded.

You will be redirected to a new page confirming your application has been submitted.

You will receive an email confirming that your application has been submitted.

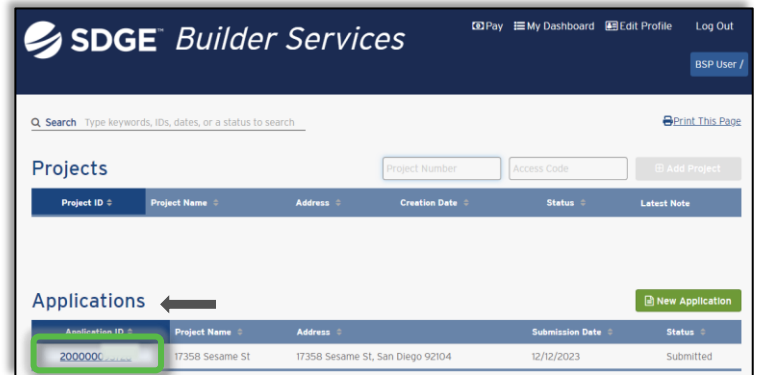


Uploading Documents to Existing Applications

Navigating to Application Upload Page

Under the “Applications” header of your dashboard, select the “Application ID” for the application you want to upload documents to.

This will navigate you to the document upload page for your application.



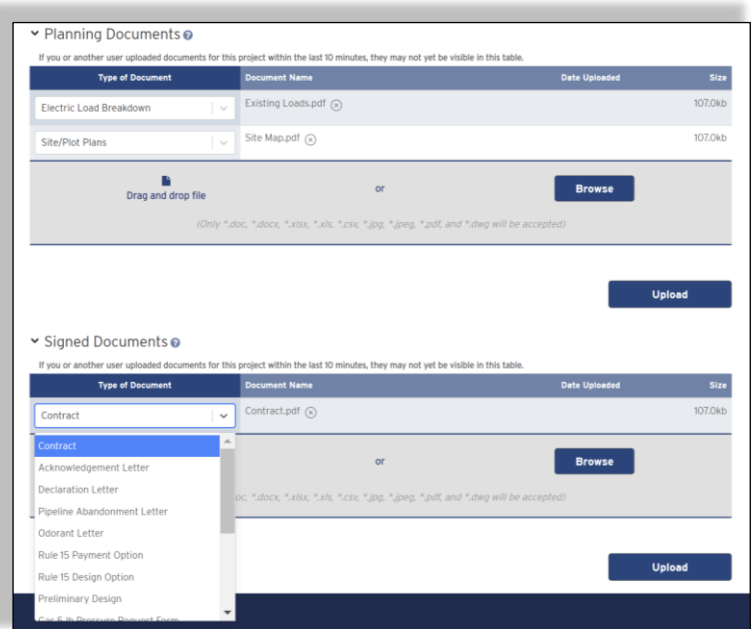
Uploading Documents

Here you can upload planning documents or signed documents.

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

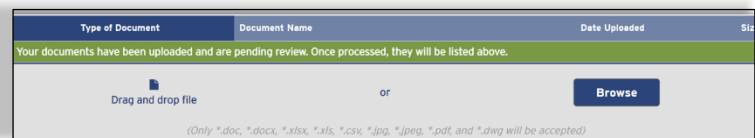
Click the “Upload” button once all necessary files have been selected.



Upload Confirmation

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.



Uploading Documents for an Active Project

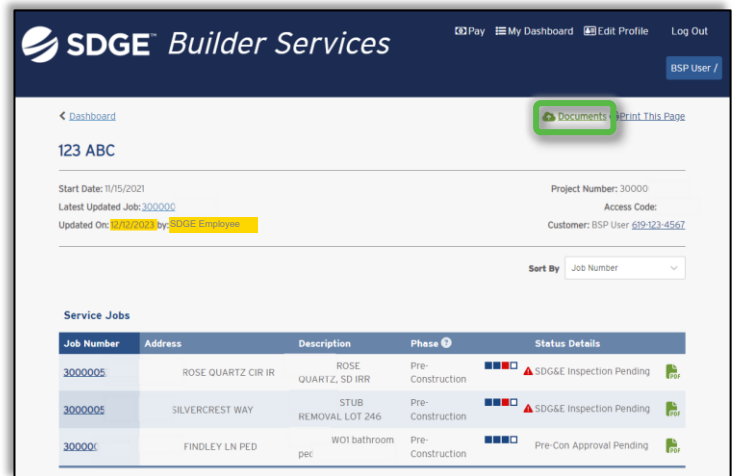
Navigating to Document Upload Page

Under the “Projects” header of your dashboard, select the “Project ID” for the project you want to upload documents to.

This will navigate you to your Project Summary Page.



Select **Documents** on the Summary Page.



Uploading Documents

Here you can upload planning documents or signed documents.

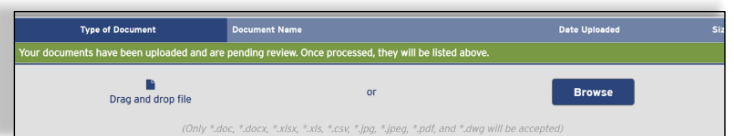
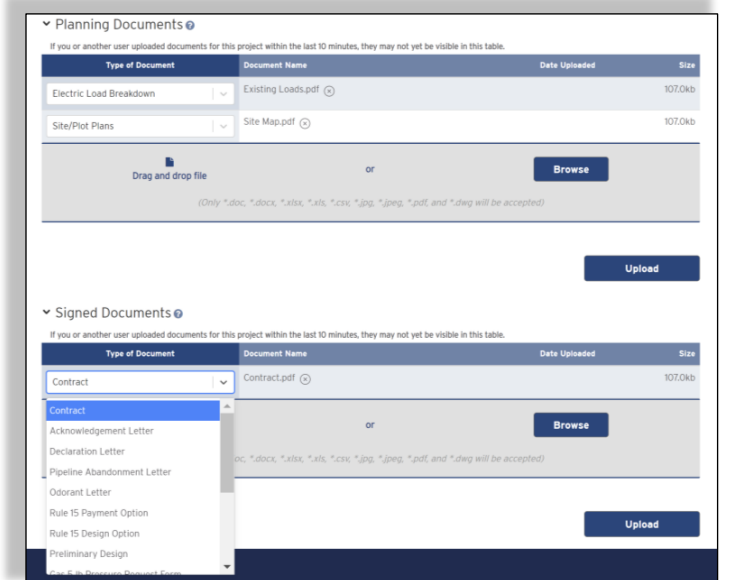
Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

Click the “Upload” button once all necessary files have been selected.

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.



Upload Confirmation