

OpenDSD User Guide for PTS Projects

DEVELOPMENT SERVICES

Overview

A hybrid system has been developed to use OpenDSD for the electronic submittal of projects and documents and our current Project Tracking System for performing reviews and inspections.

Topics – Click on the links below to skip to the specific sections

1. [Requesting a Project Setup for Permit or Construction Change](#)
2. [Submitting Documents for Project Review \(Initial Submittal\) per Submittal Manual](#)
3. [Submitting documents for Project Status of Updates Required / Recheck Required / Issuance Checklist Items](#)
4. [Submitting “Ready for Final Version” Documents](#)
5. [Downloading Approved Plans](#)
6. [Frequently Asked Questions \(FAQs\)](#)

Rules

1. All **NEW** projects, corrections and construction changes need to be submitted electronically.
2. All project types qualify for electronic document submittal (Building, Discretionary, Engineering, Mapping, Construction Change, etc.)

Website and Login

1. Visit [OpenDSD](#) website
2. Create/register for new User Account. For information regarding set up of an account and details of the account functionality, click [here](#).

Plan Requirements

1. PDF format only.
2. **Plans must have the PTS # printed on them.**
3. Plans must be landscape oriented and must be all on same sized sheets.
4. Files shall be limited to 200MB.
5. **Flatten all drawing layers** in your CAD program before creating the PDF. Pages must be straight, clear with no streaks; sheets must be contrasting with background and not too light or dark.
6. Do not submit ‘password protected’ or ‘locked’ documents. The Security Method must be set to “No Security”. No security certificates can be in place.
7. Failure to submit correctly will result in the submittal being returned, which will delay review.

File Organization

1. Each document will be uploaded individually; do not combine documents
2. Refer to the [Project Submittal Manual](#) for required documents

Terms

Initial Submittal

First time submittal of documents for Completeness Review

Completeness Review

Review by staff to see if uploaded documents meet minimum submittal requirements and are ready for Discipline Reviews

Updates Required

Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required

Approved

Permit has been issued in PTS

Recheck Required

Plans have been reviewed and have corrections (Cycle Issues Report and Submittal Requirements provided through PTS and available on OpenDSD) Repeat until all issues are signed off

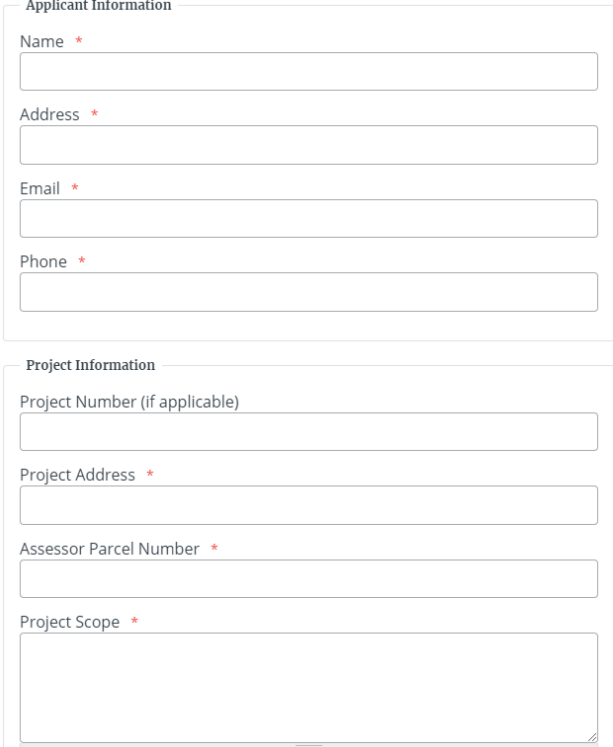
Ready for Final Version

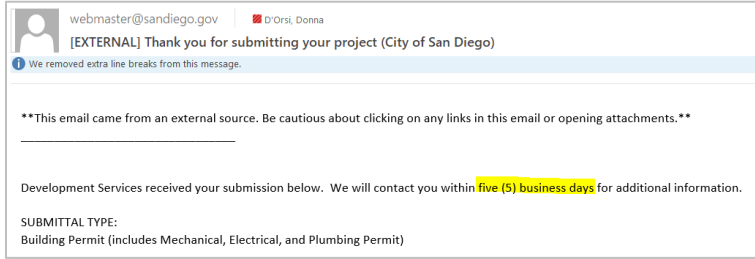
All disciplines have completed reviews and cleared outstanding issues. Awaiting upload of plan set reflecting all corrections for comparison to approved version

Ready for Issuance

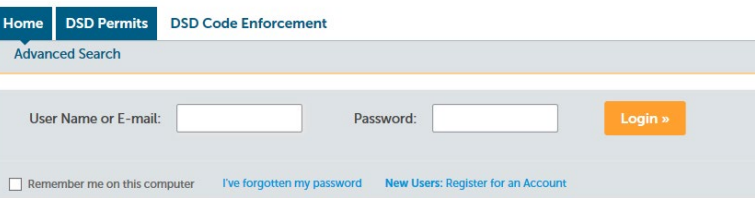


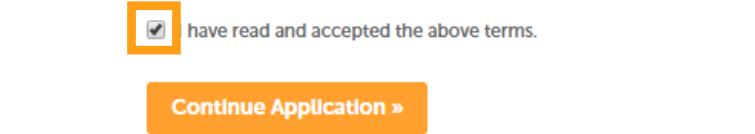
Plans have been stamped and required items identified in the Project Tracking System (PTS) Submittal Requirements Report for permit issuance.

▶ Requesting a Project Setup

Step	Action	Screen Reference
1	<ol style="list-style-type: none"> 1. In OpenDSD 2. Select 'Apply for a Permit' 3. Select Permit Type 4. Fill out the required* fields 5. Click → Submit 	

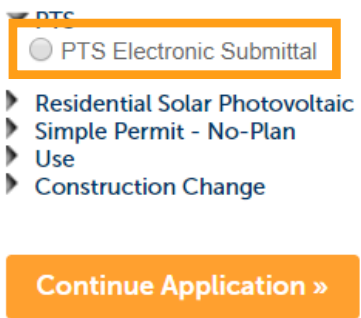
2	You will receive this message	<p>Thank you. Your submission has been received.</p> <p>Go back to the form</p>
3	<p>A system generated email will be sent.</p> <p>DSD staff will set up your project in PTS and you will receive a follow up email providing the new PTS #</p>	

► Submitting Documents for Project Review (Initial Submittal) Per [Submittal Manual](#)

1	Log in	
2	Click on "DSD Permits"	
3	Click on "Create an Application"	
4	Accept the Disclaimer and click "Continue Application"	

5 Select **PTS Electronic Submittal** record.

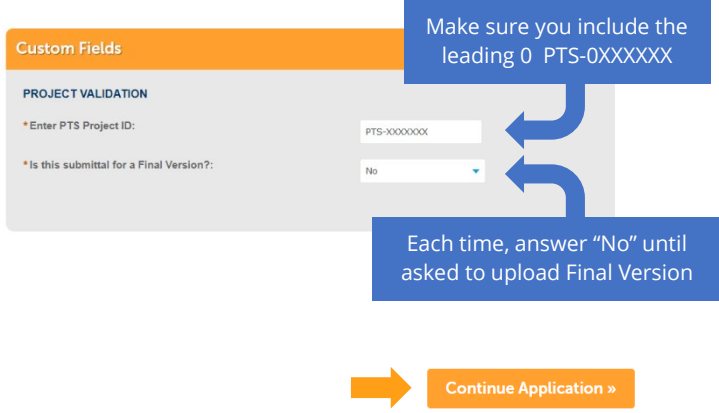
Click "Continue Application"



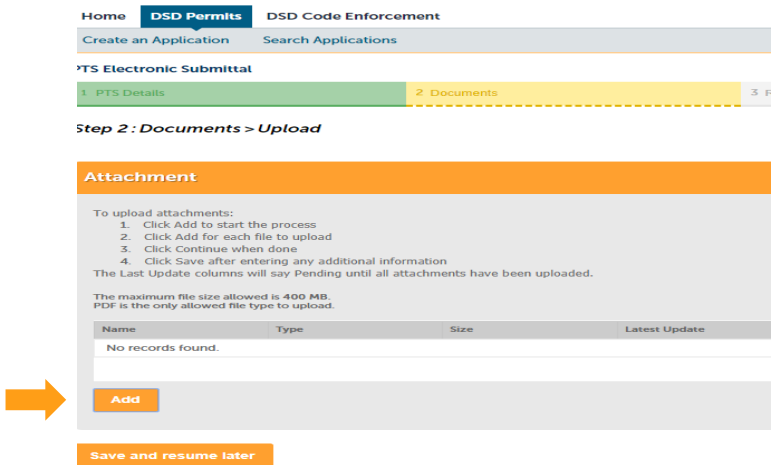
6 Enter the PTS project number provided in the email.

Answer **No**.

Click "Continue Application"



7 On the Document Upload page, select "Add"



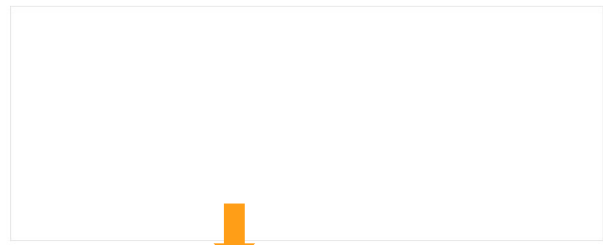
Select "Add" again to choose file to upload

Repeat until all documents are uploaded

8

File Upload

The maximum file size allowed is 400 MB.
PDF is the only allowed file type to upload.



Continue Add Remove All Cancel

Identify each document you uploaded from the drop-down menu and provide a description of each document.

1. Click "Save" after adding descriptions
2. Then, click "Continue Application"

9

Identify document type

*Type: Building Construction Plans

File: Building Construction Plans PRJ-1020461.pdf

100%

*Description: Initial submittal for plan review

Add description of document

Save Add Remove All

Continue Application »

Review documents that were uploaded.

'Add' additional documents, if needed.

Click 'Continue Application'

10

Attachment

To upload attachments:

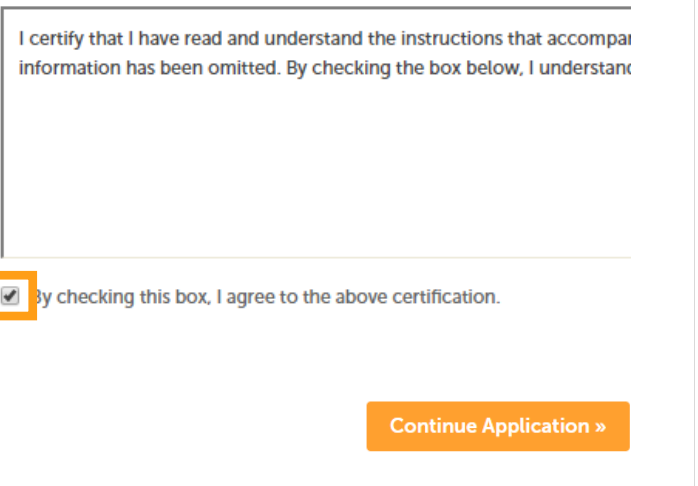

1. Click Add to start the process
2. Click Add for each file to upload
3. Click Continue when done
4. Click Save after entering any additional information

The Last Update columns will say Pending until all attachments have been uploaded.

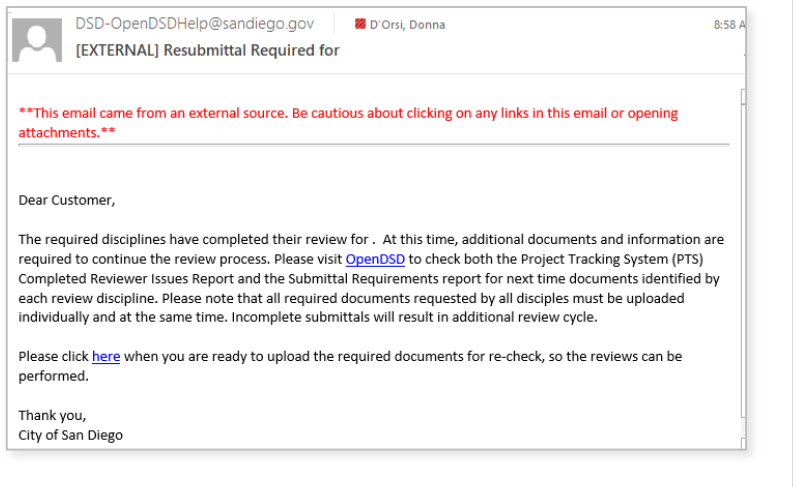
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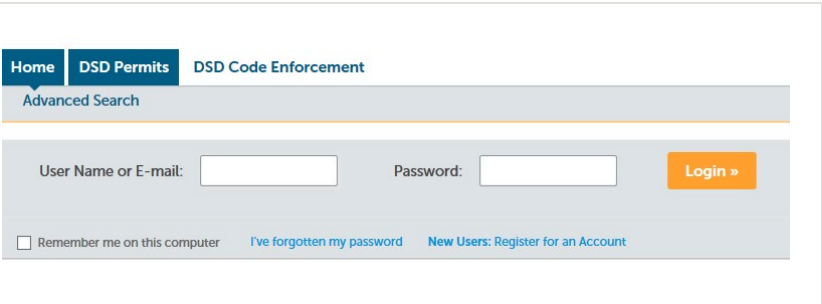


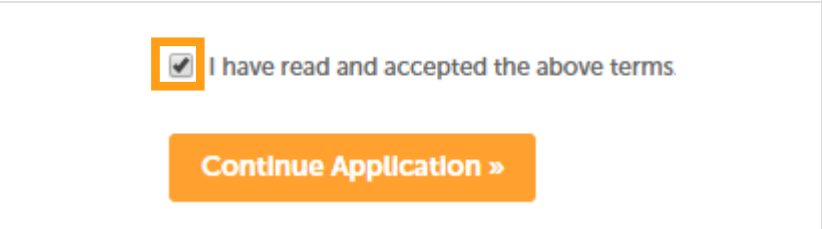
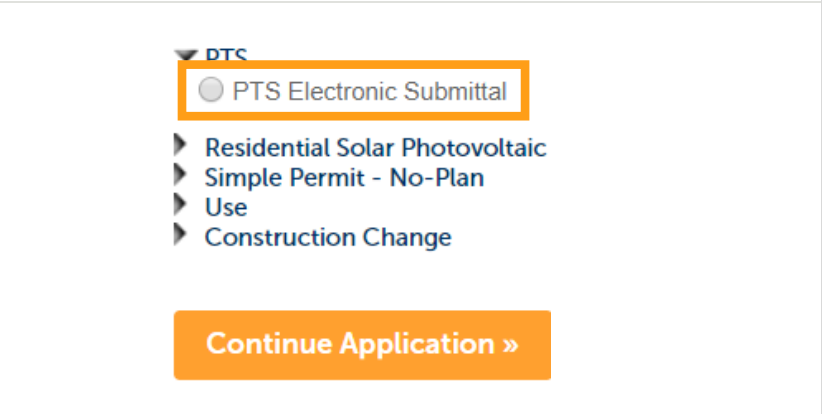
Name	Type	Size	Latest Update
Building Construction Plans PRJ-1020338.pdf	Building Construction Plans	3.46 MB	04/16/2020
Specifications PRJ-1020518 (1).pdf	Water Meter Data Card	2.57 MB	04/16/2020
General Application (DS-3032) PRJ-1020461.pdf	General Application (DS-3032)	1.83 MB	04/16/2020

Add

11	<p>Agree to the certification and click 'Continue Application'</p>	
12	<p>You will see this message</p>	
13	<p>Document submittal will go through Completeness Review by Intake Staff</p>	<p>Wait for next communication from DSD</p>

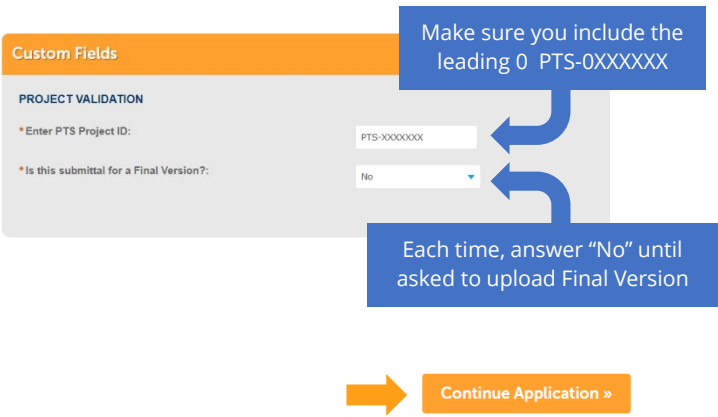
▶ **Submitting Documents for Project Status of Updates Required / Recheck Required / Issuance Checklist Items**

<p>You would receive an email notification as a reminder to resubmit documents for review or issuance. Specific instruction will be provided through PTS</p>	
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1	Log in	
2	Click on "DSD Permits"	
3	Click on "Create an Application"	
4	Accept the Disclaimer and click "Continue Application"	
5	Select PTS Electronic Submittal record. Click "Continue Application"	

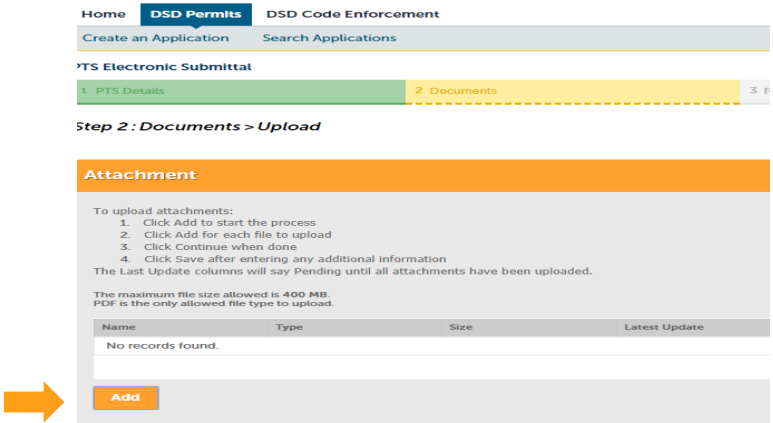
6

Enter the PTS project number provided in the email.
 Answer **No**.
 Click "Continue Application"



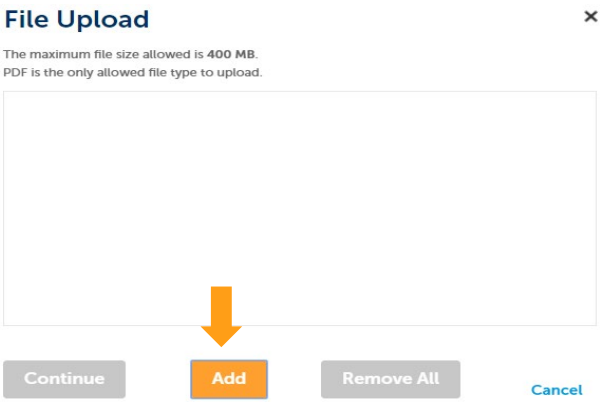
7

On the Document Upload page, select "Add"



8

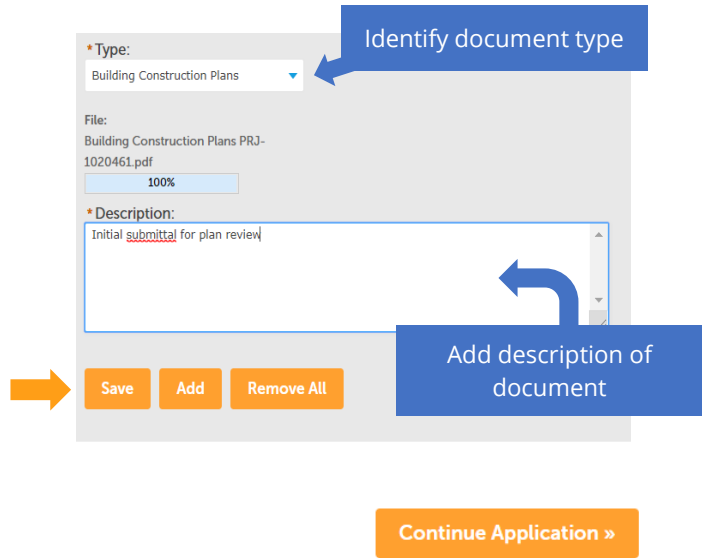
Select "Add" again to choose file to upload
 Repeat until all documents are uploaded



9

Identify each document you uploaded from the drop-down menu and provide a description of each document.

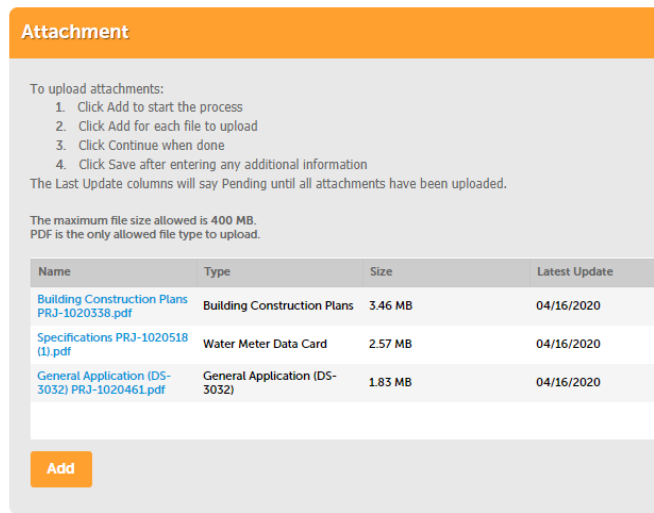
1. Click "Save" after adding descriptions
2. Then, click "Continue Application"



The screenshot shows a form for adding a document. A blue callout box labeled "Identify document type" points to a dropdown menu currently set to "Building Construction Plans". Another blue callout box labeled "Add description of document" points to a text area containing "Initial submission for plan review". Below the text area are three buttons: "Save", "Add", and "Remove All". An orange arrow points to the "Save" button. At the bottom right, there is an orange button labeled "Continue Application »".

10

Review documents that were uploaded.
 'Add' additional documents, if needed.
 Click 'Continue Application'



The screenshot shows the "Attachment" section of the application. It includes instructions for uploading attachments, a file size limit of 400 MB, and a table of existing attachments.

To upload attachments:

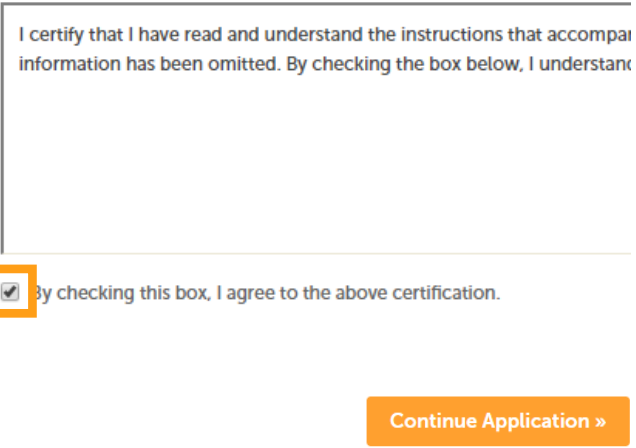

1. Click Add to start the process
2. Click Add for each file to upload
3. Click Continue when done
4. Click Save after entering any additional information

The Last Update columns will say Pending until all attachments have been uploaded.

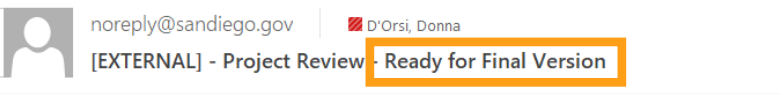
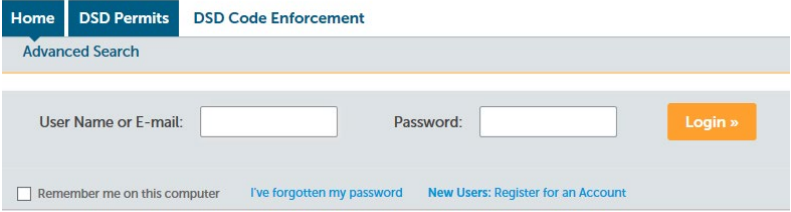
The maximum file size allowed is 400 MB.
 PDF is the only allowed file type to upload.



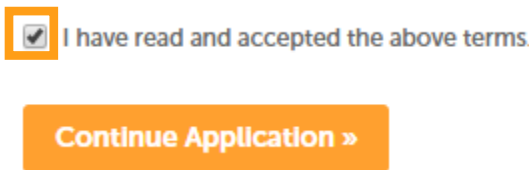
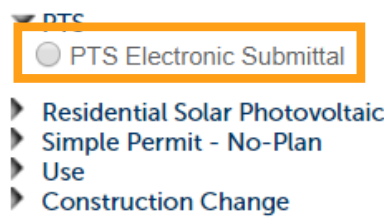

Name	Type	Size	Latest Update
Building Construction Plans PRJ-1020338.pdf	Building Construction Plans	3.46 MB	04/16/2020
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General Application (DS-3032) PRJ-1020461.pdf	General Application (DS-3032)	1.83 MB	04/16/2020

At the bottom of the attachment list is an orange "Add" button.

11	<p>Agree to the certification and click 'Continue Application'</p>	
12	<p>You will see this message</p>	
13	<p>Document submittal will go through Completeness Review by Intake Staff</p>	<p>Wait for next communication from DSD</p>

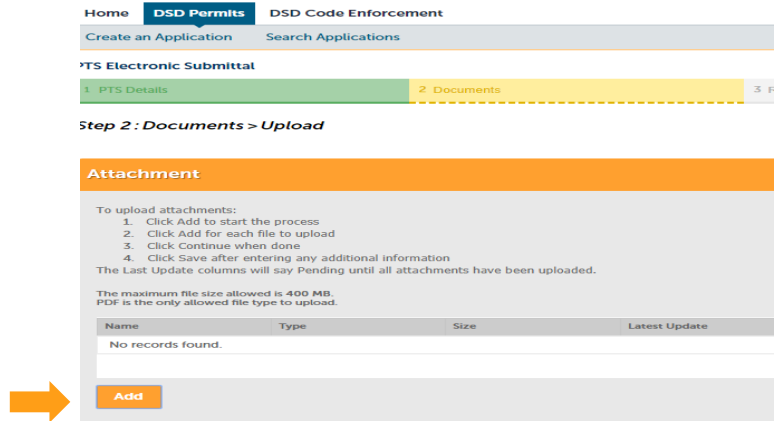
► **Submitting “Ready for Final Version” Documents**

	<p>You received an email notification to resubmit documents Final Version Comparison.</p>	 <p>Please upload Final version to be stamped.</p> <p>PTS-0656063</p>
1	<p>Log in</p>	

2	Click on "DSD Permits"	
3	Click on "Create an Application"	
4	Accept the Disclaimer and click "Continue Application"	
5	Select PTS Electronic Submittal record. Click "Continue Application"	
6	Enter your PTS project number. Answer YES (This is the only time you answer YES) Click "Continue Application"	

On the Document Upload page, select "Add"

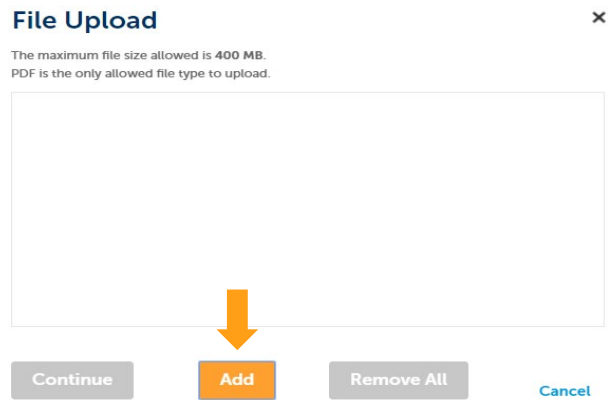
7



Select 'Add'

Only upload Final Version of Plans to be stamped.

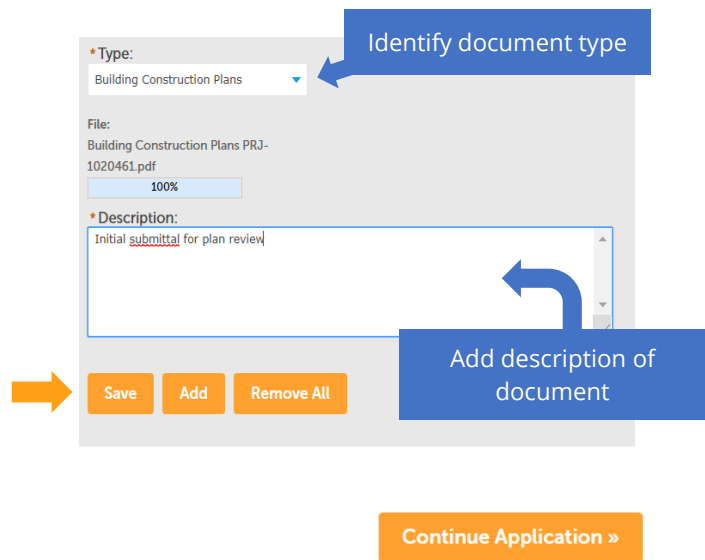
8




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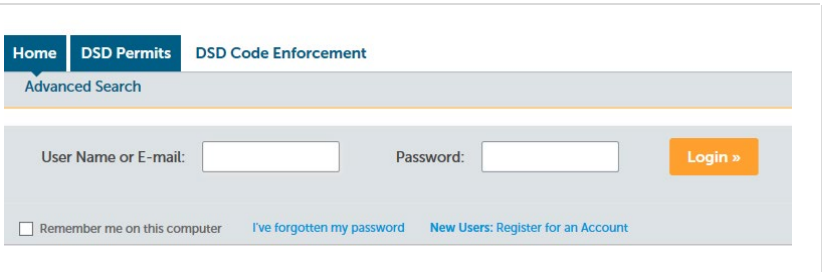
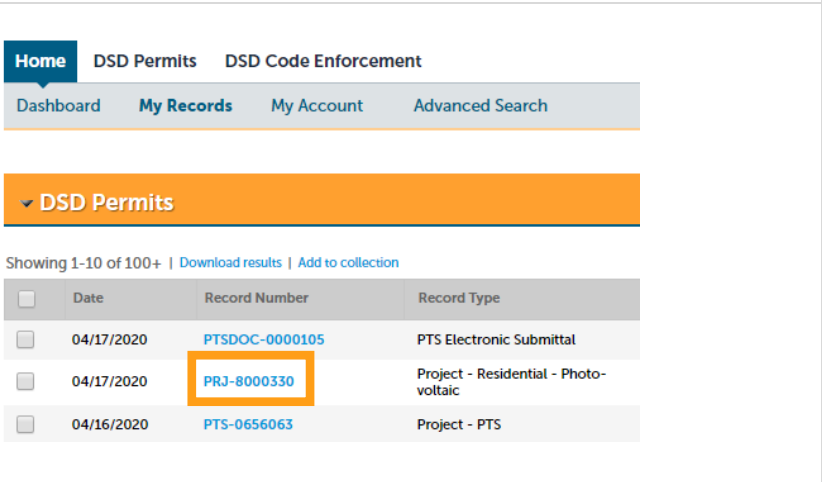
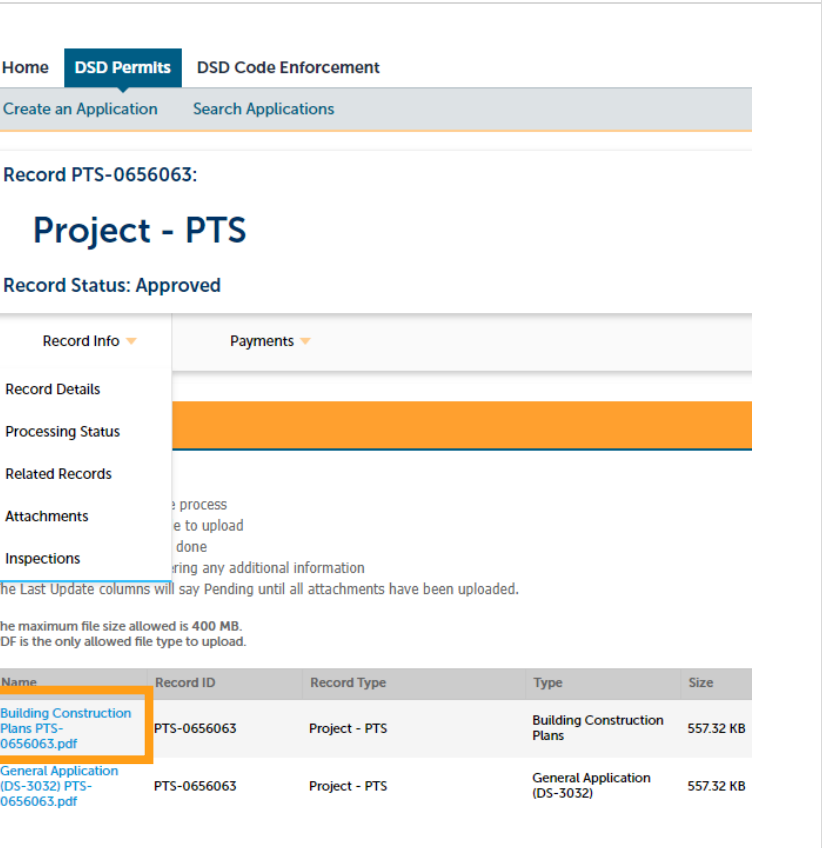
1. Click "Save" after adding descriptions
2. Then, click "Continue Application"

9



<p>10</p>	<p>Review documents that were uploaded.</p> <p>'Add' additional documents, if needed.</p> <p>Click 'Continue Application'</p>	<div data-bbox="829 237 1471 743"> <p>Attachment</p> <p>To upload attachments:</p> <ol style="list-style-type: none"> 1. Click Add to start the process 2. Click Add for each file to upload 3. Click Continue when done 4. Click Save after entering any additional information <p>The Last Update columns will say Pending until all attachments have been uploaded.</p> <p>The maximum file size allowed is 400 MB. PDF is the only allowed file type to upload.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Size</th> <th>Latest Update</th> </tr> </thead> <tbody> <tr> <td>Building Construction Plans PRJ-1020338.pdf</td> <td>Building Construction Plans</td> <td>3.46 MB</td> <td>04/16/2020</td> </tr> <tr> <td>Specifications PRJ-1020518 (1).pdf</td> <td>Water Meter Data Card</td> <td>2.57 MB</td> <td>04/16/2020</td> </tr> <tr> <td>General Application (DS-3032) PRJ-1020461.pdf</td> <td>General Application (DS-3032)</td> <td>1.83 MB</td> <td>04/16/2020</td> </tr> </tbody> </table> <p>Add</p> </div>	Name	Type	Size	Latest Update	Building Construction Plans PRJ-1020338.pdf	Building Construction Plans	3.46 MB	04/16/2020	Specifications PRJ-1020518 (1).pdf	Water Meter Data Card	2.57 MB	04/16/2020	General Application (DS-3032) PRJ-1020461.pdf	General Application (DS-3032)	1.83 MB	04/16/2020
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<p>11</p>	<p>Agree to the certification and click 'Continue Application'</p>	<div data-bbox="829 837 1471 1283"> <p>I certify that I have read and understand the instructions that accompany this information has been omitted. By checking the box below, I understand</p> <hr/> <p><input checked="" type="checkbox"/> By checking this box, I agree to the above certification.</p> <p>Continue Application »</p> </div>																
<p>12</p>	<p>You will see this message</p>	<div data-bbox="849 1356 1471 1451"> <p> Your application has been successfully submitted. Please print your record and retain a copy for your records.</p> </div>																
<p>13</p>	<p>Document submittal will go through Completeness Review by Intake Staff</p>	<p>Wait for next communication from DSD</p>																

▶ Downloading Approved Plans

<p>1</p>	<p>Log in</p>																
<p>2</p>	<p>Search for Approved PTS record Click on Record Number</p>	 <table border="1"> <thead> <tr> <th>Date</th> <th>Record Number</th> <th>Record Type</th> </tr> </thead> <tbody> <tr> <td>04/17/2020</td> <td>PTSDOC-0000105</td> <td>PTS Electronic Submittal</td> </tr> <tr> <td>04/17/2020</td> <td>PRJ-8000330</td> <td>Project - Residential - Photo-voltaic</td> </tr> <tr> <td>04/16/2020</td> <td>PTS-0656063</td> <td>Project - PTS</td> </tr> </tbody> </table>	Date	Record Number	Record Type	04/17/2020	PTSDOC-0000105	PTS Electronic Submittal	04/17/2020	PRJ-8000330	Project - Residential - Photo-voltaic	04/16/2020	PTS-0656063	Project - PTS			
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04/16/2020	PTS-0656063	Project - PTS															
<p>3</p>	<p>Use the Record Info Drop Down. Select 'Attachments'. Click on Building Construction Plans.</p>	 <p>Record PTS-0656063: Project - PTS Record Status: Approved</p> <p>Record Info ▾ Payments ▾</p> <p>Record Details</p> <p>Processing Status</p> <p>Related Records</p> <p>Attachments</p> <p>Inspections</p> <p>The Last Update columns will say Pending until all attachments have been uploaded.</p> <p>The maximum file size allowed is 400 MB. PDF is the only allowed file type to upload.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Record ID</th> <th>Record Type</th> <th>Type</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>Building Construction Plans PTS-0656063.pdf</td> <td>PTS-0656063</td> <td>Project - PTS</td> <td>Building Construction Plans</td> <td>557.32 KB</td> </tr> <tr> <td>General Application (DS-3032) PTS-0656063.pdf</td> <td>PTS-0656063</td> <td>Project - PTS</td> <td>General Application (DS-3032)</td> <td>557.32 KB</td> </tr> </tbody> </table>	Name	Record ID	Record Type	Type	Size	Building Construction Plans PTS-0656063.pdf	PTS-0656063	Project - PTS	Building Construction Plans	557.32 KB	General Application (DS-3032) PTS-0656063.pdf	PTS-0656063	Project - PTS	General Application (DS-3032)	557.32 KB
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▶ Frequently Asked Questions (FAQs)

Do I need an account to submit projects?

Yes, login to your [OpenDSD](#) account to apply for a permit, if you don't have an account see help tutorial (make link) and watch the video (make link).

Who do I contact if I need help?

DSD-OpenDSDHelp@sandiego.gov

Record Structure

PTS-0XXXXXX: This is where the documents are uploaded, and the workflow is progressed.

PTSDOC-XXXXXX: This record gets created at each document package submittal and is subject to a Completeness Review

Jump to:

- ▶ [What does it mean when my PTS-0XXXXXX status is...?](#)
- ▶ [What does it mean when my PTSDOC-0XXXXXX status is...?](#)
- ▶ [I uploaded the wrong document for my initial project submittal. Who do I contact?](#)
- ▶ [When I try to upload, I keep getting an error message. Why does this keep happening?](#)
- ▶ [Where can I locate my projects for DSD Permits \(Development Services Department projects\)?](#)
- ▶ [It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?](#)
- ▶ [How do I retrieve a forgotten username or password?](#)
- ▶ [I found an option on my account that says, "Add a Delegate." What does that mean?](#)
- ▶ [What does "Add Collection" mean?](#)
- ▶ [I noticed my customer information is incorrect. Who do I contact to correct this issue?](#)

What does it mean when my PTS-0XXXXXX status is...?

Opened

Project has been created and is awaiting document upload

Updates Required

Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required, refer to email sent and upload new requested items.

Deemed Complete

Documents meet minimum submittal requirements and are ready for Discipline Reviews

In Review

Plans have been routed for review assignment, track progress in [OpenDSD](#)

Ready for Final Version

All disciplines have signed off, upload plans with all corrections incorporated for comparison.

Final Version Submitted

You have uploaded final version for comparison and stamping by staff

Ready for Issuance

Plans have been stamped and required items identified in the Project Tracking System (PTS) Submittal Requirements Report for permit issuance.

Approved

Your permit has been issued in PTS.

What does it mean when my PTSDOC-0XXXXXX status is...?

Submitted

Documents have been uploaded and are awaiting Completeness Review

Updates Required

Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required, refer to email sent and upload new requested items.

Deemed Complete

Documents meet minimum submittal requirements and are ready for Discipline Review

Final Version

Plans that were submitted do not need any further corrections

I uploaded the wrong document for my initial project submittal. Who do I contact?

You will be able to delete your document and upload a new document: If your project is still in "Open" status on OpenDSD.

You will not able to upload any documents: Once your project is in "Submitted" status. You will need to contact your system manager on the project who emailed you the confirmation Project Tracking System Number to have them "Cancel" their review and re-open the cycle, so you can upload your new version. In doing this, you might delay your project review.

*** If your project is "In-Review," you will also not be able to upload additional documents to the project ***

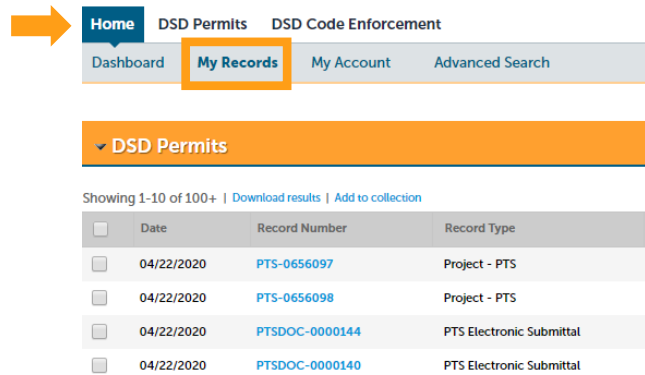
When I try to upload I keep getting an error message. Why does this keep happening?

There are two solutions for you if this keeps persisting:

1. You can contact DSD-OpenDSDHelp@sandiego.gov if this is for a new application submission
2. If you have been assigned a Project Tracking System Number and are in direct contact with a system manager or development project manager, you can reach out to them via email and discuss the issue you are having.

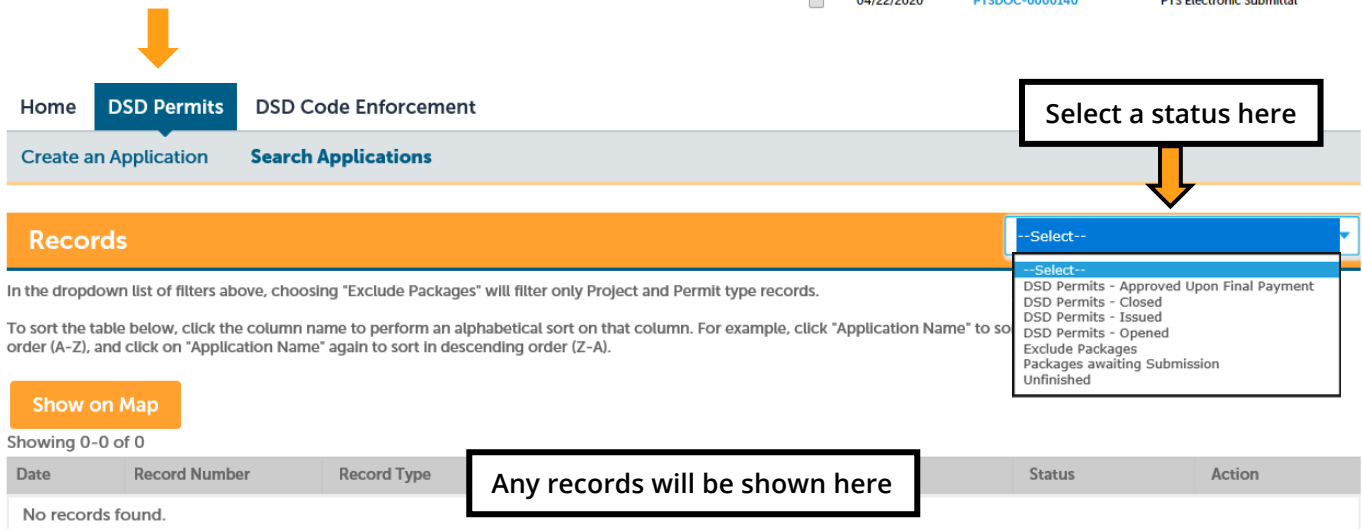
Where can I locate my projects for DSD Permits (Development Services Department projects)?

To see **all your records**, from the 'Home' tab, click the 'My Records' link (see right)



You can also locate projects **by specific status** by clicking on "DSD Permits", you will be able to view your projects under "Records" (see below).

If you click on the "Select" drop down it will give you a list of statuses you can choose from

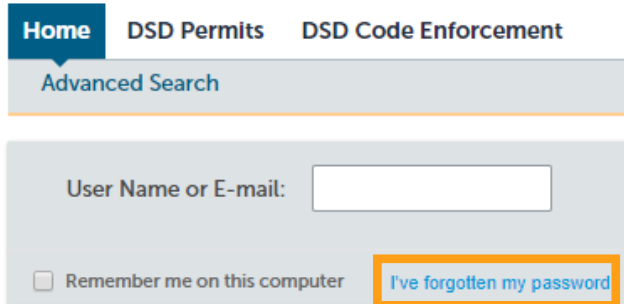


It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?

You can contact DSD-OpenDSDHelp@sandiego.gov

How do I retrieve a forgotten username or password?

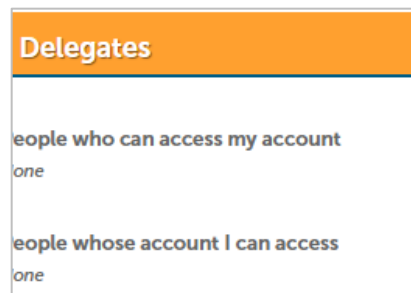
Use the 'Forgot Password' link on the [OpenDSD](#) Home Page



The screenshot shows the top navigation bar with 'Home', 'DSD Permits', and 'DSD Code Enforcement'. Below is an 'Advanced Search' bar. The main login area contains a 'User Name or E-mail:' input field, a 'Remember me on this computer' checkbox, and a blue link 'I've forgotten my password' which is highlighted with an orange border.

I found an option on my account that says, "Add a Delegate." What does that mean?

Delegates can be added to your account so that other users can access the account. Use the Account Management link at the upper right of [OpenDSD](#) Login page. Note that in order to be a delegate, the user must be registered with an existing account.



The screenshot shows a section titled 'Delegates' with an orange header. Below the header, there are two categories: 'people who can access my account' and 'people whose account I can access'. Each category shows a count of 'one'.

What does "Add Collection" mean?

A Collection allows you to group records for easy retrieval. It doesn't remove records from the 'My Record' list but creates a subset that allows you to view only the records in the group. You can name them, provide a description, and delete a collection at any time (continued on next page).

Home **DSD Permits** DSD Code Enforcement

[Create an Application](#) [Search Applications](#)

Records

In the dropdown list of filters above, choosing "Exclude Packages" will filter only Project and Permit type records.

To sort the table below, click the column name to perform an alphabetical sort on that column. For example, click "App" sort in descending order (Z-A).

Showing 1-10 of 31 | [Download results](#) | [Add to collection](#)

<input type="checkbox"/>	Date	Record Number	Record Type	Application Name	Status
<input type="checkbox"/>	04/16/2020	PTSDOC-		Submittal	PTS-0656062
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656053
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656056
<input type="checkbox"/>	04/15/2020	20TMP-0		Submittal	PTS-0656056
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656005
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656056
<input type="checkbox"/>	04/15/2020	PTSDOC-		Submittal	PTS-0656056

Create a New Collection

* Name:

Description:

[Dashboard](#) [My Records](#) [My Account](#) [Advanced Search](#)

Pending

some description

Total Records: 2 (2 DSD Permits)

Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)

Fees Summary: \$0.00 Paid, \$0.00 Due

DSD Permits

[Move to...](#) | [Copy to...](#) | [Remove](#)

Showing 1-2 of 2 | [Download results](#)

<input type="checkbox"/>	Date	Record Number	Record Type	Application Name	Description	Status	Action
<input type="checkbox"/>	04/17/2020	PRJ-8000330	Project - Residential - Photo-voltaic	Project - Residential - Photo-voltaic:1250/Heritage		In Queue	
<input type="checkbox"/>	04/15/2020	PRJ-8000329	Project - Residential - Photo-voltaic	Project - Residential - Photo-voltaic:3260/Anella		In Review	

I noticed my customer information is incorrect. Who do I contact to correct this issue?

Contact the Project Manager listed on your PTS project for correction.