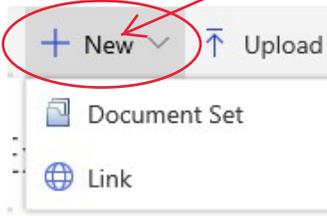
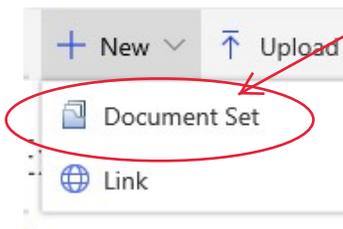


## CREATING A DOCUMENT SET IN DOH PLAN REVIEW

1. Open your library
2. Click "New"



3. You will need to create a "Document Set" for each project you are submitting for review. Click "Document Set"



(As an example, if you have three separate projects to submit, you will need to create three separate Document Sets.)

4. Fill in all pertinent info.

- The Name of the Document Set will ONLY be the name of the facility. If you are submitting more than one project for a particular facility, use the facility name and then number the projects (example: Hospital1, Hospital2, etc.)
- Do not select anything for "Submit Documents for Review". (You will fill this out at a later time)
- Insert description of the project. This should include any prior Drawing Index Numbers pertaining to this project.
- Insert Plan Reviewer's Name ONLY if you have an office appointment
- IF YOU HAVE AN OFFICE APPOINTMENT, use the dropdown at "Appointment Scheduled" and click "Yes".
- Insert the "Date of Appointment" if applicable
- Use the dropdown at "Type of Review" and pick "Preliminary" or "Final"

5. Click "Save" at the bottom of the form

Scheduled  Yes

Appointment

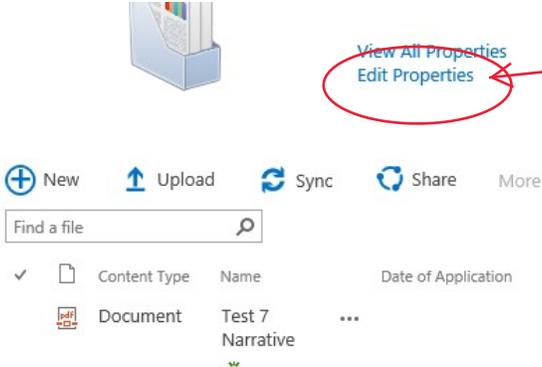
Type of Review

6. Each document should be named exactly what it is (i.e. your Application should be named "Application", your Narrative should be named "Narrative" and your Plans should be named "Plans"-all Plan pages must be in one pdf). ALL documents must be uploaded as separate documents. You can upload your documents one of

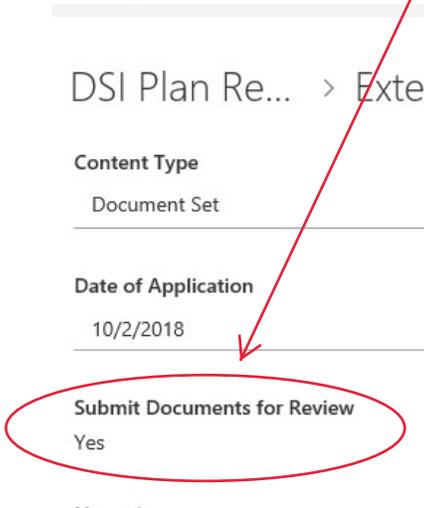
## CREATING A DOCUMENT SET IN DOH PLAN REVIEW

two ways: 1) drag and drop the Application, Plans, and Narrative to the Document Set OR upload your Application, Plans, and Narrative by using the "Upload" button. (Click Upload/browse/highlight document(s)/open/OK/Save) **WE ARE NO LONGER USING THE OLD NAMING CONVENTION.**

7. Once all documents have been uploaded and you can see them in the Document Set, click "Edit Properties"

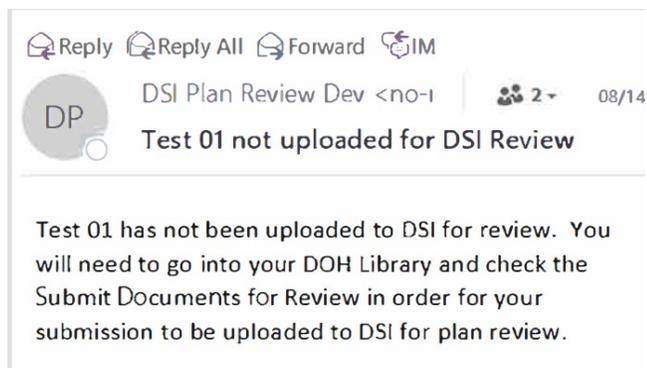


8. Scroll to "Submit Documents for Review", dropdown and click YES--clicking YES triggers the workflow to begin.

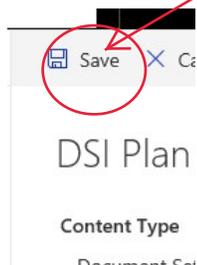


If you fail to select "Yes" for "Submit Documents for Review", a reminder email will be sent the following morning that looks like the below.

## CREATING A DOCUMENT SET IN DOH PLAN REVIEW



### 9. Click "Save" at the top



### 10. Your plans will be logged in, a tracking number will be assigned and a confirmation email sent to the submitter from [noreply@workflownotification.com](mailto:noreply@workflownotification.com). See similar email below. (NOTE: the tracking number is included with the name of your document set. You will use this tracking number when requesting updates on your submission.)

**From:** noreply@workflownotification.com  
<noreply@workflownotification.com>  
**Sent:** Friday, October 05, 2018 4:00 PM  
**To:** Logan, Debra <delogan@pa.gov>  
**Subject:** 11111 NAME OF YOUR DOCUMENT SET received by DSI Plan Review

Your submission 11111 NAME OF YOUR DOCUMENT SET has been received by DSI Plan Review. For status updates, please send emails to [RA-DSI@pa.gov](mailto:RA-DSI@pa.gov) with Facility Name and date of submission.

Please note: [noreply@workflownotification.com](mailto:noreply@workflownotification.com) is not a monitored email. Please do not send emails to [noreply@workflownotification.com](mailto:noreply@workflownotification.com). You can direct any questions to [RA-DSI@pa.gov](mailto:RA-DSI@pa.gov).

You may want to add [noreply@workflownotification.com](mailto:noreply@workflownotification.com) as a safe sender in your email, so it is not marked as spam or placed into a spam folder.

### 11. If all required documents are NOT uploaded to your document set, you will receive an email from [noreply@workflownotification.com](mailto:noreply@workflownotification.com) similar to the one below:

## CREATING A DOCUMENT SET IN DOH PLAN REVIEW

**From:** noreply@workflownotification.com <noreply@workflownotification.com>  
**Sent:** Wednesday, October 03, 2018 9:33 AM  
**To:** Logan, Debra <delogan@pa.gov>  
**Subject:** Plan Review Returned

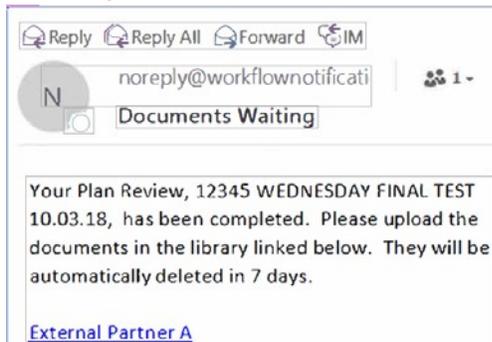
Your plan, **THE NAME OF YOUR DOCUMENT SET**, has been returned for the following reason:

An Application/Checklist is required for all projects. |

Please make the recommended changes and resubmit.

**Make the suggested changes, go to “Edit Properties”, scroll to “Submit Documents for Review”, dropdown and click YES and Save.**

- 12. When your plans have been reviewed and returned to your library, you will receive an email from [noreply@workflownotification.com](mailto:noreply@workflownotification.com) similar to the one below. **Please NOTE, you will have 7 calendar days to remove your documents before the workflow automatically deletes them from your library.****



**If the link in your email isn't working, you can always go directly into your library site and retrieve from there.**