

**UCLA Building Department
Review Process Procedures
April 2026**

The UCLA Building Department provides a variety of services to assist with the Design and Construction of all UCLA projects. It is responsible for the Reviews & Approvals of Plans, Building Inspections, Permitting and Certification of Occupancy along with management of the E-Plan Room. Due to the numerous services provided and the volume of projects that are processed daily, these procedures were implemented to ensure fluidity and accurate record keeping. All official reviews must be submitted to our department by using the established Plan Review Process via an assigned UCLA Project Manager.

Please feel free to reach out to me if you have any questions.

Thank you.

Julie Vicuna

**Plan Review Process Administrator
Administrative Officer-Engineering Services
UCLA-Capital Programs
jvicuna@capnet.ucla.edu**

WORKFLOWS

All reviews, approvals & occupancy requests are processed via pre-formatted workflows in Document Management. There are ten templates which are in the “Manage Work Flow-List Templates” section. The workflows used are specifically for Engineering reviews and therefore the only ones designated to go directly to the review team. Please do not use or create any other templates. All our templates fall under the TYPE: Engineering.

	Type ↑▼	Workflow Name	Summary
	Q	Q	Q
View	Engineering	Engineering-Review: Plan Check	Indicate Project Phase and/or backcheck # here: (EXAMPLE: 50%CD, 100%CD- BC#1)
View	Engineering	Engineering-Review: Study/Conceptual Design or BOD	Indicate review type here:
View	Engineering	Engineering-Approval: CO/ TCO/ TCO EXT Request	Indicate type of Occupancy Certificate requested here:
View	Engineering	Engineering-Review: Final Plan Check	Final Plan Check (use prior to SFM stamp & BP Request)
View	Engineering	Engineering-Approval: Bulletin/Addendum	Indicate the Bulletin/Addendum Number here: (along with backcheck# if it applies):
View	Engineering	Engineering-Review: OTC Appointment Request	Indicate OTC APPT day requested (Wed or Thu); Indicate backcheck if applicable:
View	Engineering	Engineering-Approval: RFI/Reports/Submittals/Fire Alarm or Sprinkler	Indicate Type of Review here: (RFI requires RFI# / Submittal requires full 11 digit Spec Section #)
View	Engineering	Engineering-Review: SD or DD Plan Check	Indicate type of review here: (EXAMPLE: 50%SD, 75%DD,100%SD)
View	Engineering	Engineering-Review: CD Initial Plan Check w/SPECS	Indicate CD phase here: (EXAMPLE: 50%,75%,100%);
View	Engineering	Engineering-Approval: Building Permit/BP EXT/DEMO	Indicate Type of Permit here: (EX: Permit Signature/ BP EXT or DEMO Permit)

Below is an explanation of each workflow and the type of Bluebeam invite it will require. This information is also listed in the **General Instructions section of each workflow.**

- 1. Engineering – Review: Study/Initial Design Review** (Create a Bluebeam Session)
Use to review the inception of a project: Study/Conceptual Design or BOD.
- 2. Engineering – Review SD & DD** (Create a Bluebeam Session)
Use for **all** SD & DD reviews- You must specify the phase of the project (ex: 50%SD) and **must include Specifications at DD level.**
- 3. Engineering – Review: CD Initial Plan Check w/Specs** (Create a Bluebeam Session)
Use only the first time your Construction Documents are being reviewed. Specify the phase of the project, ex: 50%CD, 100%CD and **must include Specifications.**
- 4. Engineering – Review: Plan Check 100%CD** (Create a Bluebeam Session)
Use for Plan Checks & Backchecks. **Backchecks must include the BC#, Specifications & previous plan checks in separate files, in the BB invite.**

5. **Engineering – Review: OTC Appt.** (Create a Bluebeam Session)
To be used to request an OTC appointment.

6. **Engineering – Review: Submittal/RFI/Fire Alarm or Sprinkler/Reports.**
(Create a Bluebeam Session or Project invite)
To be used during the construction phase.
 - Fill in your name in the blank slot in the Workflow Process steps section.
 - Submittals (must include full eleven digit Specification Section #),
 - RFI's (must include RFI # & discipline)
 - Product Data (must include Product description)
 - All Reports (must include amount of pages and discipline).
 - Fire Alarms & Sprinklers-do not identify as a submittal- Must identify as Fire Alarm or Fire Sprinkler as this indicates that the SFM will review
 - Fire Alarm & Sprinkler Systems that have been approved and need to be revised, must be identified as: Fire Alarm-REVISION#___ of Fire Sprinkler REVISION#___

7. **Engineering – Review: Final Plan Check** (Create a Bluebeam Session)
To be used once all corrections have been made and prior to submitting for a Permit Set approval. This workflow is optional however, it is highly recommended.

8. **Engineering – Approval: Building Permit/ BP Extension/ DEMO Permit**
(Create a Bluebeam Project) To be used when your project is ready for issuance of a Building Permit, Building Permit Extension or Demolition Permit.

9. **Engineering – Approval: Bulletin/Addendum** (Create a Bluebeam Project)
To be used for all Bulletins/Addendums. Include the Bulletin/Addendum number and the discipline(s) that will be impacted by this change.

10. **Engineering – Approval: TCO/TCO Extension or CO Request** (No Bluebeam Invite)
To be used when requesting any type of certification for occupancy. Must include the pre-formatted project information in the General Instructions Section.

Your workflow will require one of two types of Bluebeam invite, either a Session **or a Project. Include the full invite link in the General Instructions Section of the workflow.**

Always invite the team listed below to the BB Invite:

- | | |
|--|--|
| ○ cnewth@capnet.ucla.edu | ○ gpatil@capnet.ucla.edu |
| ○ jvicuna@capnet.ucla.edu | ○ tlynch@capnet.ucla.edu |
| ○ jmegorden@capnet.ucla.edu | ○ dsartoris@capnet.ucla.edu |
| ○ dmantas@capnet.ucla.edu | ○ srahman@capnet.ucla.edu |

TIPS FOR WORKFLOWS

- **Workflow Summary Section:** *List a description of the review:* Please keep the information brief.
- **Project Phase:** *Please list the phase the project is in;* example 50% DD, 100% CD Phase, Construction Phase, etc.
- **Read the General Instructions Section of all workflows- Do not delete anything in this section, just provide answers in the sections as requested.**
- **General Instructions Section:** *Discipline to be reviewed;* Always list the discipline that needs to be reviewed, **not** the name of the reviewer.
- **General Instructions Section:** *SPECS:* Indicate if Specs are either on the drawings or in book format or UPJO specs.
- **General Instructions Section:** *Note to Reviewer:* If needed you can list very brief instructions or information for the reviewers in this area.
- **General Instructions Section:** *ADA Review:* There are various outside ADA consultants, when requesting an ADA review always list the name of the ADA consultant, not their company name, EX: ADA-Bob Smith.
- **General Instructions Section:** *BB Invite Type;* Make sure you are uploading the correct BB invite type (Project or Session) according to the instructions listed in this section.
- **Authorized Editor Section:** *Add your back-up or the PM to this section:* By adding them to this section you ensure that they receive completion notifications.
- **Workflow Process Section:** *Do not add or remove anyone in this section nor change their signing status.* There may be workflows in which you will be required to fill in your name in this section. Please read the General Instructions Section thoroughly.
- **Files Already Uploaded Section:** This section is used to upload **PDF** files onto the workflow such as; emails, punch lists or any other additional information.
- **All Documents** submitted for review must have the **UCLA Project name & Project number and the current date.**
- **When a review is completed, you must read and follow the instructions listed on the workflows, DO NOT bypass the review comments on the workflow.**

REQUESTING AN OVER-THE-COUNTER (OTC) APPOINTMENT

OTC appointments are held on Wednesday and Thursday mornings only, from 8am to Noon. They are 45-minute appointments in which the Engineers review plans simultaneously. The PM and consultants must all be available via phone during the appointment time to address any questions our team may have.

- You must submit your request by using the **Engineering Review-OTC Appt.** workflow template in Document management.
- Provide the information in the **exact format** shown below and include it in the workflow General Instructions section, under the OTC INFORMATION area.
Do not cut & paste information onto this format or into the General Instructions section.

FORMAT FOR OTC REQUESTS (VIA EMAIL):**PROJECT NAME:****PROJECT NUMBER:****UCLA PROJECT MANAGER NAME & CELL PHONE:****UCLA REP NAME & CELL PHONE:****DISCIPLINES TO BE REVIEWED: (DO NOT LIST REVIEWERS NAMES)******OUTSIDE CONSULTANT INFORMATION** (Do not delete this section)**

You must include person's name, phone number and firm name. If none than list NA next to each applicable discipline.

ARCHITECTURE:**ADA:****ELECTRICAL:****CIVIL:****STRUCTURAL:****MECHANICAL:****PLUMBING:**

- Create a Bluebeam Session invite to upload your documents to and attach the full invite link in the General Instructions Section, under the BLUEBEAM SESSION BELOW area of the workflow.
- Invite the team below to the BB Session:

<ul style="list-style-type: none"> ○ cnewth@capnet.ucla.edu ○ jvicuna@capnet.ucla.edu ○ jmegorden@capnet.ucla.edu ○ dmantas@capnet.ucla.edu 	<ul style="list-style-type: none"> ○ gpatil@capnet.ucla.edu ○ tlynch@capnet.ucla.edu ○ dsartoris@capnet.ucla.edu ○ srahman@capnet.ucla.edu
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TIPS FOR OTC APPOINTMENTS

- Your appointment requests should have the Information required as formatted in the sample.
 - It must be filled out exactly as shown in the sample
 - Do not cut and paste information into the General Instructions Sections ever.
- If there are no outside consultants at all, please list “NA” on each discipline that applies to. **Do not delete the consultant portion.**
- If your workflow is not submitted by the deadline, your appointment will be cancelled. To avoid cancellation of your appointment please be sure to submit by the listed deadlines below:
 - The deadline to submit your workflow for a Wednesday Appointment is Tuesday 1pm.
 - The deadline to submit your workflow for a Thursday Appointment is Wednesday 1pm.
- The type of review must be indicated on the request: Initial Review or BC#__ if applicable.
- Initial Reviews during an OTC appointment: If this is an Initial review of a project, please note that since this is the first time we are reviewing this project, it is processed as a standard Initial Review and all reviewers are assigned.
- Scope & Volume of Initial reviews during an OTC appointment: If the scope & volume of the project do not allow the review to be completed within the 45-minutes allotted for the OTC appointment, the review will be converted from an OTC appointment review to an Initial Review and the standard due date will apply. I will modify your workflow to reflect the change in review type & due date.

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TCO/TCO Extension & CO Request Process

Temporary Certificate of Occupancy/TCO Extension/Certificate of Occupancy

The request for any occupancy certificate is submitted via the Engineering-Approval: TCO/TCO Extension or CO Request workflow. This workflow notifies the SFM & Chief Building Inspector that you are requesting occupancy. Once they review and approve the request for an occupancy form, the blank occupancy form will be routed to you via Docu-Sign for you to fill out.

In the General Instructions section of the workflow include the required project information exactly as formatted below (**see samples**).

TCO REQUEST

- **Project Name:** CNSI A Level Clean Room Silane Gas
- **Project Number:** WO#6060000
- **PM Name:** Project Manager
- **Original Date of Building Permit:** July 16, 2020
- **TCO Expiration date:** 5/3/21

TCO EXTENSION REQUEST

- **Project Name:** CNSI A Level Clean Room Silane Gas
- **Project Number:** WO#6060000
- **PM Name:** Project Manager
- **Original Date of Building Permit:** July 16, 2020
- **Original TCO Expiration date:** 5/3/21
- **TCO Extension Expiration date:** 8/3/21

TCO EXPIRATION DATE: For all TCO types the **PM must reach out to Carl directly to obtain the expiration date**. Provide the exact date on the request, not a timeframe of 60 or 90 days

CO REQUEST

- **Project Name:** CNSI A Level Clean Room Silane Gas
- **Project Number:** WO#6060000
- **PM Name:** Project Manager
- **Original Date of Building Permit:** July 16, 2020
- **Construction Value **is Required:**** \$000000.00

CONSTRUCTION VALUE AMOUNT FOR CERTIFICATES:

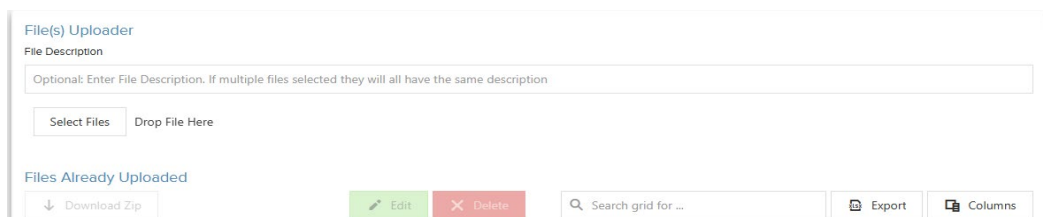
- **CO:** The Construction Value for a CO must be included in the request
- **TCO:** There may be times when I may ask the PM to verify the construction value for a TCO, this may be because it was not provided when a BP was issued.

TIPS FOR TCO/TCO EXTENSION/CO REQUESTS

- **Submit your workflow request for an occupancy form, a minimum of two weeks prior to the date that you need to have approval for occupancy.**
- All project information included on the workflow must be correct. Incorrect information requires research on our end which will delay the issuance of the form.
- Make sure to read the instruction section of the workflow as you will have to sign the workflow before you receive the blank TCO or CO form.

Jennie Redner	25	Sign workflow to receive CO form	Sign Off Required			
Julie Vicuna	28	Blank CO form sent via Docu-Sign	Sign Off Required			

- If you need to add an attachment to the occupancy form (ex: IOR list of items that need to be completed-Punchlist/ Emails, etc.) please include the attachment in PDF format only on the **Upload Files** section of the workflow which is below the Workflow Process Section.



- **Docu-Sign:** There are various people involved in the signing of these forms, some are not UCLA employees. In order to ensure your signees are available to sign your form, you must notify them via email, before you send the docu-sign form. This email notification helps you to verify their email addresses are correct and also makes them aware to lookout for the Docu-Sign email in their inbox and also in their spam folders.
- When filling out the form on Docu-Sign, make sure you have the correct Inspector and SFM name to send it to and that they are available to sign. If your information is incorrect you will have to start a new form.
- **There are two pages on the certificate forms.** When page one is filled out, page two will then route itself to whomever is tasked with filling that information out. If one person is filling out the entire form it will route itself back to that person. Look for a second email notification from Docu-Sign in our inbox or spam folder.

- Make sure to Double Check the form for errors before you click "Finish" on each page as corrections cannot be made once you click "Finish".
- Erroneous Email addresses: We only receive notification of erroneous email addresses when Docu-Sign tries to deliver the form to that email address. Please double check the email names and addresses before you fill out the form as we cannot make corrections.

These forms are legal documents therefore we cannot make changes to the form once it is filled out. Please make sure your information is correct

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Bluebeam Instructions

Who gets Blue Beam Access (Invite)?

To avoid delays we ask that our entire team be given BB access to **ALL** workflows sent to us. Regardless of the type of review or discipline you are submitting.

- Invite the team below to the BB Session/Project Invite:
 - cnewth@capnet.ucla.edu
 - jvicuna@capnet.ucla.edu
 - jmegorden@capnet.ucla.edu
 - dmantas@capnet.ucla.edu
 - gpatil@capnet.ucla.edu
 - tlynch@capnet.ucla.edu
 - dsartoris@capnet.ucla.edu
 - srahman@capnet.ucla.edu

Should you upload a Blue Beam Project or a Blue Beam session?

Sessions-

Sessions do not allow signing. However, they do allow all team members to access & review a project concurrently.

- All documents that need to be reviewed must be uploaded as BB sessions.

Projects-

Projects allow signing & reviews. However, for reviews, team members must take turns checking out a project and checking it back in. This "one at a time" access slows down the review process. Therefore, Carl will only be signing Bulletins/Addendums/BP Extensions and Permit Sets on BB Project invites.

- Building Permits should be uploaded as BB Projects and signature blocks/arrows should be added for the SFM, CASp & CBO to sign.
- Building Permit Extensions, Addendums & Bulletins must be uploaded as BB Projects- A signature block will not be needed, **please do not add a signature block**- Carl should have the ability to check out the project, he will add a textbox and will check it back in.

Please note: All Documents submitted for review must have the full UCLA Project name, UCLA Project number and the current date listed on them as indicated below.

On every page: Drawings/ Specs/ Fire Alarms/ Fire Sprinklers/Tab Reports/ Calculations

On cover page only if it is one PDF document: RFI's/ Submittals/ Other Reports

Blue Beam Invite File Contents & Labeling
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There have been occasions where several different projects have been submitted on the same BB session/project. Please create one BB session or project for **each project**.

We have also encountered various unlabeled files in a session, that makes it difficult for Engineers to know which is the most current session in need of review. Please label all files.

The project invite must include the full name of the project as listed on the permit set

There can be multiple files per project for each review that a project goes through, however **each file must be labeled with the date/type of review, including the backcheck number if applicable & project number**, as follows:

The project invite must include the full name of the project as listed on the permit set

Date: Year-Month-Date

Description: Type of review & the order number of review if a backcheck/bulletin or addendum

Project Number: The project number issued to a project

Samples below:

259023 Initial Plan Check CP1234

259023-BackCheck#3-CP1234

259023-BackCheck#4-CP1234

259023- Final Check-CP1234

259023-Permit Set- CP1234

259023-Bulletin#1-CP134

259023-Fire Alarm-948295 or Fire Alarm BC#1

259023-Fire Alarm-REVISION #1 948295

260223-SUBMITTAL#260314-001-02

260223-RFI #276 OR RFI #276 BC#1 (When Applicable)

SPEC SECTIONS NUMBERS ON CONSTRUCTION REVIEWS

The contractor must provide a full eleven-digit Spec Section number on all submittals. A general number indicating the discipline only (260000-000-00) will not be accepted. The Spec section number provides details as to what is being reviewed and the reviewers use that as a reference point if additional research is needed.

Spec Section breakdown is shown below:

EXAMPLE SPEC SECTION#: 235200-000-02

The highlighted numbers (235200) indicates what discipline is being reviewed and what the issue/item is:

23 HVAC -Discipline

52 Heating Boilers and Accessories- Issue/Item

00 This number is not consistent from project to project so it does not need to change

EXAMPLE SPEC SECTION: 235200-000-02

The highlighted numbers (000) are the submittal number. There may be more than one submittal for the same spec section from the Contractor on the same project. Therefore, when the first one is submitted it will have 001 and the second one will have 002 and so on.

EXAMPLE SPEC SECTION: 235200-000-02

The highlighted numbers (02) (these last two digits are indicative of the “backcheck” number) This number is the one that always changes to indicate the amount of times it has been reviewed. The first (Initial) review is labeled 00. The first backcheck will be 01.

APPROVED FIRE ALARMS & FIRE SPRINKLERS

Fire Alarms & Fire Sprinklers that have been previously approved, by the State Fire Marshal & Campus Building Official and have been revised or had new information added, will be identified on workflows as Fire Alarm-REVISION or Fire Sprinkler-REVISION.

- Revisions will be tracked, therefore, the first revision will be REVISION#1. If there are additional changes, they will be tracked sequentially.
- Backchecks on these reviews will be tracked as we do with all reviews, as listed below:
BC# _____
- The word REVISION will be added in the Workflow Summary Section of the workflow
- Additional information regarding the changes will be added in the General Instructions- Note to Reviewer section.
- The review deadline will be five business days, same as Fire Alarm & Fire Sprinkler reviews
- They will be labeled in Bluebeam as shown below:
 - 260923-Fire Alarm-REVISION #1 – project number
 - 260923-Fire Sprinkler-REVISION #1 - project number

Bulletins & Addendums

All Bulletins & Addendums that present a change to the original permit set must be submitted for CBO approval. They must be submitted via workflow using the workflow template listed below:

Engineering-Approval: Bulletin/Addendum (Requires a Bluebeam Project Invite).

- Addendums are submitted during bidding or before a contract is awarded
 - Bulletins are submitted after the contract is awarded or during construction.
- Bulletins must be numbered & will only be reviewed in numerical sequence.
- Addendums must be numbered & will only be reviewed in numerical sequence. They shall be identified as follows: DESIGN-ADDENDUM#_____.
- The discipline impacted must be listed next to the bulletin/addendum number see example: **Bulletin#1-Electrical/Mechanical or Design-Addendum#1-Architectural/Structural**
- The **discipline(s) impacted by the changes presented on the Bulletin /Addendum** do not change based on the type of corrections requested by the reviewers. The disciplines will remain the same throughout the approval process. Therefore, these disciplines must be listed on all workflows just as they were on the first workflow reviewed.
See below- SCREENSHOT OF WORKFLOW INSTRUCTION:
- MUST PROVIDE INFORMATION FOR THE ITEMS BELOW:

Disciplines: List the disciplines **that will be impacted** by the changes in the Bulletin or Addendum here:

■
- Addendums and Bulletins that are Contractual only and do not present any changes to the original permit set do not need the CBO's approval. However, they must be submitted to our E-PlanRoom in PDF format to Suzy Sullivan and labeled: **"CONTRACTUAL BULLETIN#__" OR "CONTRACTUAL ADDENDUM #__"**.

Drawing Format

- The full drawing set with all disciplines will be one Bluebeam file.
- Each sheet regardless of discipline must have matching title blocks & fonts and must include the full UCLA project name, UCLA project number and issue date.
- Each sheet must be titled and numbered
- The issue name with dates as the project progresses must be updated on all sheets.
- The set must include a key plan indicating the location of project within the building

Specification Format

- **Specs must have the full UCLA project name and number listed on every page.**
- **Specs included on Drawings:** Drawings that include specifications (not book format) should be submitted as one file in each BB session or project.
- **Book Format Specs:** Projects with Specifications in book format are to be submitted with the drawings in the same BB session.
 - The date on the Specs and the drawings must be the same.
 - There should be two files, one for the drawings and one for the book specifications **at each milestone.**
- **UPJO Specs:** UPJO specs should be listed on the front sheet of the permit set.
 - They should be listed with title & date for each spec for which a job will be performed. i.e.: "UPJO Spec-Discipline-Date".
 - The same listing should appear on the workflow general instructions section.

Project Naming Requirements

A UCLA project name must include the information listed below in the same order listed to provide crucial information regarding the entirety of the project.

- **Projects must have the building/facility name, room number, space type, and the type of work being done.**
 - **The project name should be listed in all review documents, in document management and on the BB invite just as it is written in the drawings.**

SAMPLES:

BUILDING/FACILITY NAME, ROOM# 123-UTILITY CLOSET, ELEC PANEL REPLACEMENT

BUILDING/FACILITY NAME, ROOM# 456-LOBBY-REMODEL

BUILDING/FACILITY NAME, ROOM# 789-OFFICE-TI

BUILDING/FACILITY NAME, ROOM# ABC-CLASSROOM-AHU-2 INSTALL

BUILDING/FACILITY NAME, ROOM# B60-245-CLASSROOM-CEILING DEMO

For off campus projects:

The full name of the facility will suffice in place of a UCLA campus building name. You can include "UCLA" before the facility name, see sample below.

Sample: UCLA Westwood Center, Suite 200, Office Remodel

Also, if you have a long project name, you can shorten it by abbreviating portions that won't alter the naming requirement:

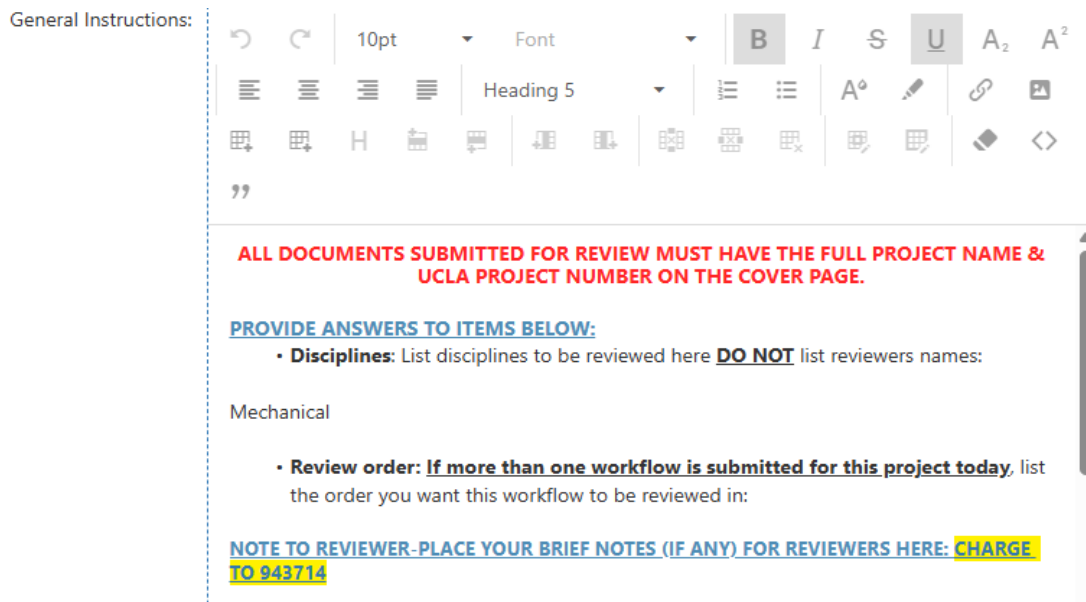
Deferred Maintenance FY 2025-2026 Slichter AHU-2 Zone Control Replacement

Can be listed as:

DM FY 25-26 Slichter Hall AHU-2 Zone Control Replacement

CHARGE NUMBERS THAT ARE DIFFERENT FROM THE PROJECT NUMBER

If your department moves project funds from the original, permitted project number you must always include the new charge number in the GENERAL INSTRUCTIONS SECTION of all workflows, within the NOTE TO REVIEWER area.



FREQUENTLY ASKED QUESTIONS

WHEN TO SUBMIT AN RFI OR PRODUCT SUBMITTAL

RFI's & Product Submittals are submitted when a project is in construction.

IS AN APPROVED TAB REPORT REQUIRED PRIOR TO OBTAINING A TCO OR CO?

Depending on the type of project, an approved TAB report may be required prior to obtaining a C of O.

WHAT DO I DO WITH THE WORKFLOW ONCE THE REVIEW IS COMPLETED?

Some workflows require your signature once a review has been completed or to obtain TCO & CO forms. The workflow must be signed as soon as you receive it in your queue.

Read the comments and/or instructions provided by the CBO/SFM & Reviewer on all completed workflows. The CBO may require the PM to schedule a meeting between consultants and reviewers prior to correcting the comments or the SFM may have instructions on who to send your forms to and these instructions will be noted on the completed workflow.

DO I HAVE TO INCLUDE THE UCLA PROJECT NAME & NUMBER ON REVIEW DOCUMENTS?

Yes, All Documents submitted for review must have the UCLA Project name, UCLA Project number and current date listed on them. See page 10 for details.

Abbreviations Index

BB	Bluebeam
BOD	Basis of Design
BP	Building Permit
BP EXT	Building Permit Extension
CALCS	Calculations
CD	Construction Documents
CO/C of O	Certificate of Occupancy
DD	Design Development
OTC	Over-the-Counter
SD	Schematic Design
SPECS	Specifications
SPEC SEC#	Specification Section Number
TCO	Temporary Certificate of Occupancy
TCO EXT	Temporary Certificate of Occupancy Extension