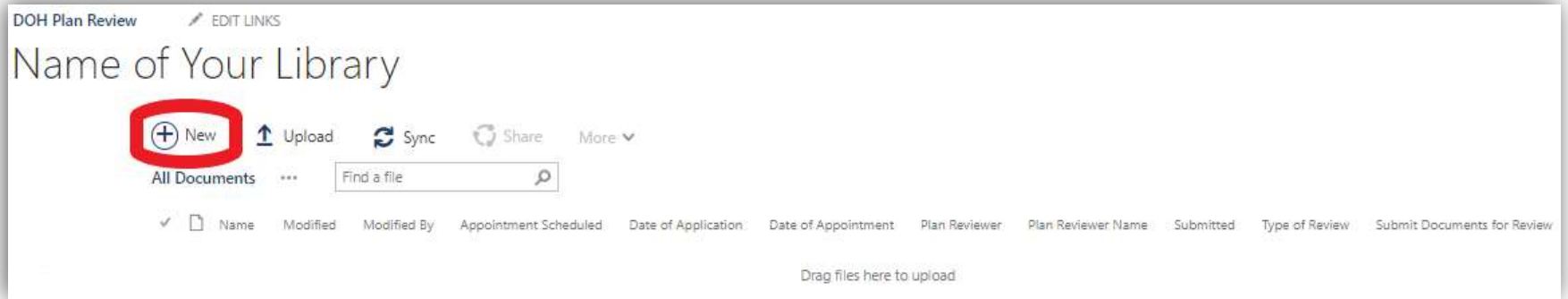
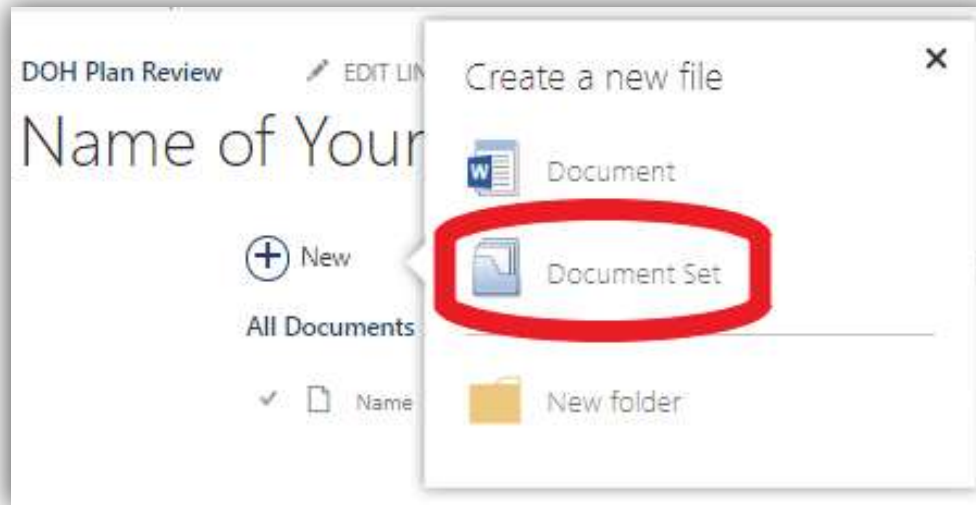


CREATING A DOCUMENT SET IN DOH PLAN REVIEW

STEP 1: Open your Library and Select “New.”



Step Two: Select “Document Set.”



Step Three: Fill out Document Set Form with appropriate information.

*Document Set should just be the name of the facility you are submitting a plan for. **No Symbols***

Step Four: Leave "Submit Documents for Review" as "No" (You will change this later). Select Save at bottom of screen.

DOH Plan Review [EDIT LINKS](#)

New Document Set: Document Set

Spelling...

Name *

Description

Date of Application

Submit Documents for Review

Plan Reviewer Name

Appointment Scheduled

Date of Appointment

Type of Review

Name of Your Facility

A description of the Document Set

Today's Date

No

(None)

No

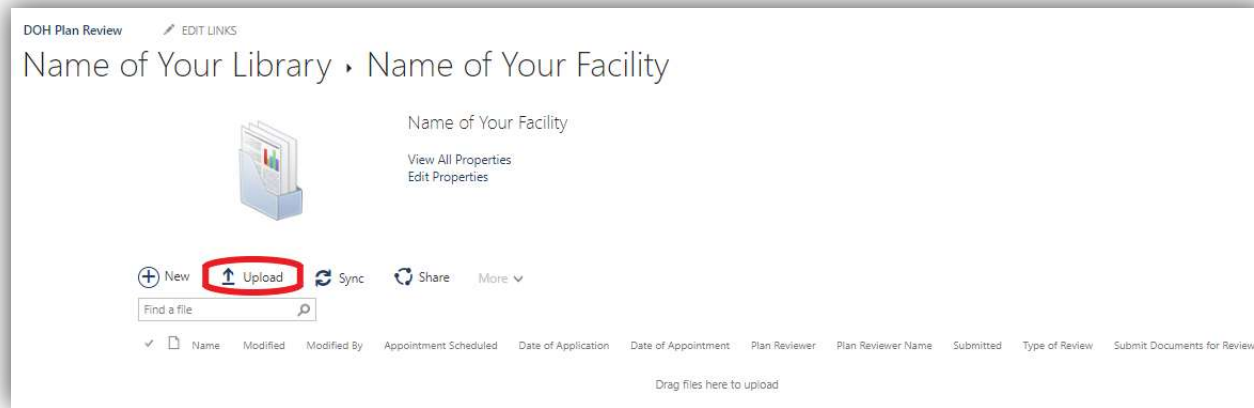
No

No

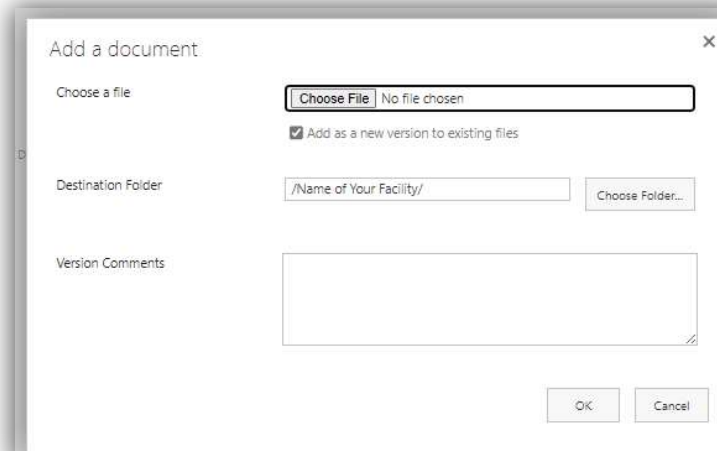
The form is a web-based interface for creating a new document set. It features a left-hand sidebar with labels for various fields: Name *, Description, Date of Application, Submit Documents for Review, Plan Reviewer Name, Appointment Scheduled, Date of Appointment, and Type of Review. The main content area contains the corresponding input fields. A red arrow points to the 'Name of Your Facility' text box. Another red arrow points to the 'Today's Date' date picker. A blue 'X' is placed over the 'Submit Documents for Review' dropdown menu, which is currently set to 'No'. Below this dropdown is the instruction: 'Check the box when you have uploaded all the documents for review.' Further down, red arrows point to the '(None)' dropdown, another 'No' dropdown, a date picker, and a final dropdown menu.

YOU ARE NOW INSIDE OF YOUR DOCUMENT SET WITHIN YOUR LIBRARY ex: Name of your Library > Name of Your Facility

Step Five: Select Upload.



Step Six: Choose One of Your 3 PDF Files (ex: Checklist, Narrative, or Plan) and Select OK.



Step Seven: Change Submitted to Yes. Then select Save once the following requirements are met. Repeat Steps 5-7.

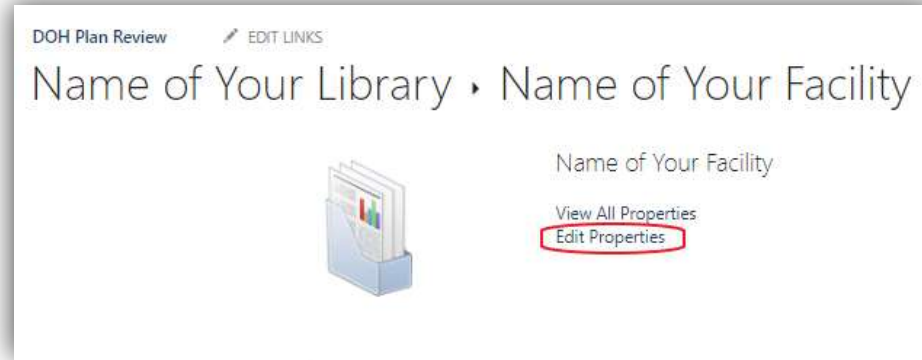
*PDFs should only be named “**Checklist**”, “**Narrative**”, or “**Plan**”. **No Symbols.***

The screenshot shows a web form titled "Add a document". At the top, there is a toolbar with icons for Save, Cancel, Paste, Copy, and Delete Item. Below the toolbar is a yellow information box stating: "The document was uploaded successfully. Use this form to update the properties of the document." The form fields include: Name (Plan.pdf), Title (empty), Appointment Scheduled (No), Date of Application (calendar icon), Date of Appointment (calendar icon), Plan Reviewer (text input: Enter a name or email address...), Plan Reviewer Name (None), Submitted (Yes, circled in red), and Type of Review (dropdown). At the bottom, there is a footer with version information and a "Save" button.

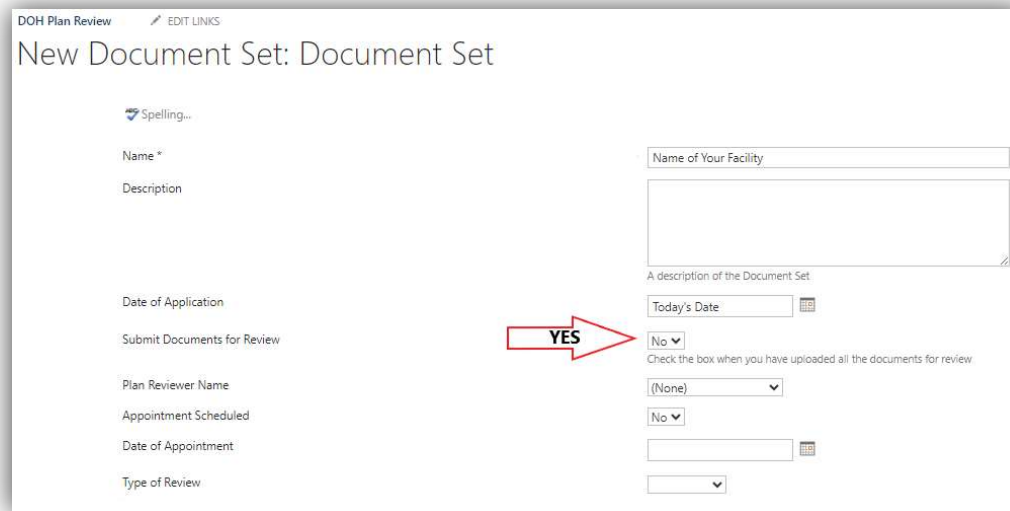
- Each piece of the submission needs to be uploaded as individual PDFs, i.e. Checklist, Narrative, Plan (1 PDF for all plan pages).
- DO NOT Submit PDFs over 200MB – Please break up into multiple PDFs if necessary. ex: Plan1, Plan2, etc....
- The Narrative must be on facility letterhead signed by the owner or administrator.

Projects submitted without these requirements will be returned.

Step Eight: Select Edit Properties.

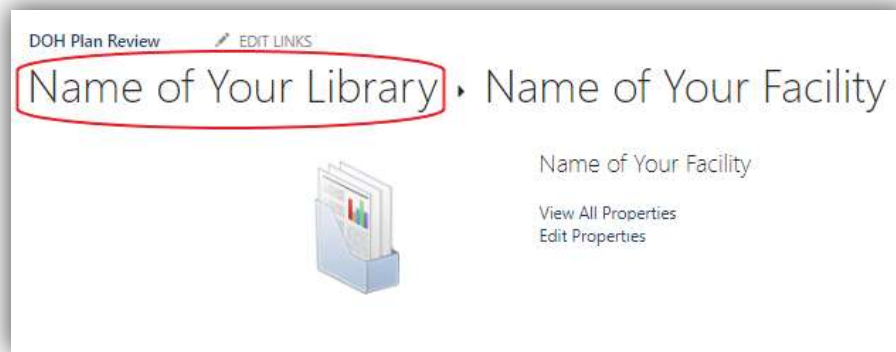


Step Nine: Change "Submit Documents for Review" to "Yes." Then select Save.

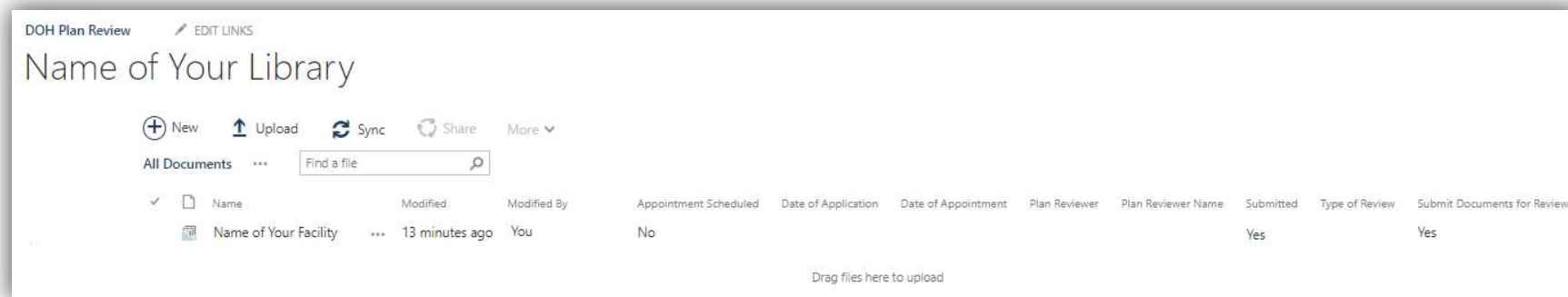


If you fail to select "Yes" for Submit Documents for Review," we will not receive your submission. A reminder email will be sent the following morning.

Step Ten: Select the Name of Your Library at the top to go back to your Library.



Your Document Set will look like this in your Library.



A confirmation email will be automatically sent to you once we receive your submission.

If required documents are INCORRECT in your submission, you will get a Plan Review Returned email with recommended changes.

Automatic notifications will be sent from noreply@workflownotification.com. Please add this e-mail address as a safe contact so your notifications will not be blocked or marked as spam.

If you do not receive confirmation or have any questions about our SharePoint Submission Process, email RA-DSI@pa.gov.

SUMMARY

The following are overall reminders to help as you finish the process of uploading your project for review.

- DO NOT USE FOLDERS.
- Document Set should just be the name of the facility. **No Symbols**
- Each piece of the submission needs to be uploaded as individual PDFs, i.e. Checklist, Narrative, Plan (1 PDF for all plan pages). **Projects submitted without all 3 documents will be returned.**
- Documents should only be named “**Checklist**”, “**Narrative**”, and “**Plan**”. **No Symbols**
- DO NOT Submit PDFs over 200MB – Please break up into multiple PDFs if necessary. Ex: Plan1 Plan2
- The Narrative must be on facility letterhead signed by the owner or administrator.