HOUSTON PERMITTING center
eSERVICES

User Guide

Step by step guide on electronic plan review application and upload process

PAPER PLANS ARE NO LONGER NEEDED!

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Overview

ELECTRONIC PLAN REVIEW

The purpose of this document is to provide general information on the process for registering with the City of Houston building permit application system called ILMS Customer Portal, and the electronic plan review system called ProjectDox.

ELECTRONIC PLAN REVIEW PROCESS:

Step 1	**Register for ILMS Customer Portal** (one time)
Step 2	**Make an application** (For each project, address, space)
Step 3	**Verify address** (New construction only)
Step 4	**Pay the Plan Review Deposit Fee** (25% deposit toward the Building Permit Fee)
Step 5	**Upload plans via the ProjectDox System**
Step 6	**Review and receive comments via the ILMS Customer Portal or ProjectDox system**
Step 7	**Resubmit plans when corrected**
Step 8	**Pay final fees when the plans are approved for permit**
Step 9	**Print the Building Permit for use**

Registration

ILMS CUSTOMER PORTAL

Before a building permit application can be submitted, a user profile must be created. The table below outlines the steps needed to create either a Non-licensed or Licensed user profile.

STEP 1: CREATE AN ONLINE PROFILE	**NON-LICENSED USERS** 1. Visit http://www.pdinet.pd.houstontx.gov/ILMS_Online_Permits/default.asp 2. Click on the link **First Time User? Click here to register** 3. Click **No** when asked, *Are you associated with an electrical, plumbing, or mechanical trade contractor?* 4. Click **No** when asked, *Are you associated with a Texas state licensed engineering firm?* 5. Click **No** when asked, *Do you have a City of Houston iPermits advanced payment account?* 6. Click the **Submit** button 7. Enter the required user information and click the **Submit Add** button **LICENSED USER** *(Advanced Pay Account Holders)* 1. Submit an **iAcknowledgement form** by one of the following methods: • Email to rmcacd@houstontx.gov, • Fax to 832-395-9614 or • In person at the Houston Permitting Center on the 1st Floor at Counter 29.
STEP 2: USER NAME AND PROFILE	You will receive a confirmation email with instructions.

Note: Any **iAcknowledgement forms** submitted via email or fax must be notarized.

Application Process

INITIATING A COMMERCIAL BUILDING PERMIT

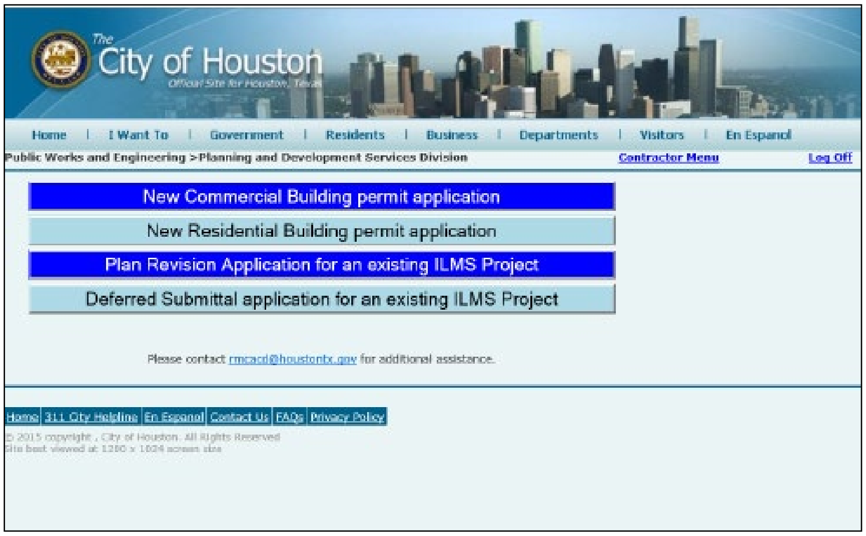
Log into your ILMS Customer Portal account. Under the iPermits Online Service Menu, click on the **Building Permits Applications** button as illustrated.

To submit a new application, click on the **Begin New Application** button.

A list of building permit applications previously submitted will display, when applicable.

Application Process

INITIATING A COMMERCIAL BUILDING PERMIT



Select the appropriate application type:

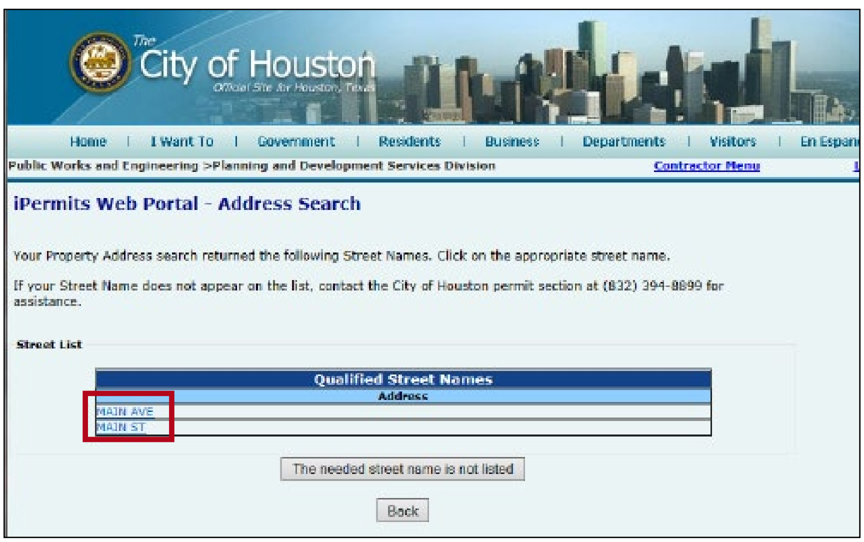
- A new application
- A revision application for an existing project

Application Process

FINDING THE PROJECT'S ADDRESS

One of the most important parts of the process is selecting the correct address. Selecting an erroneous address can result in additional fees and delays in the approval process

1. Enter the street number, abbreviated as **Street No**
2. Enter the **Street Name**
3. Click on the **Search for Address** button.



Click on the correct street name from the generated list to continue.

If your street name does not appear, click on the button **The needed street name is not listed** and contact the Permits Section for assistance.

Do not enter street directions (e.g. N, S, E, W) nor street types (e.g. Dr., Rd., etc.) into the address search.

Application Process

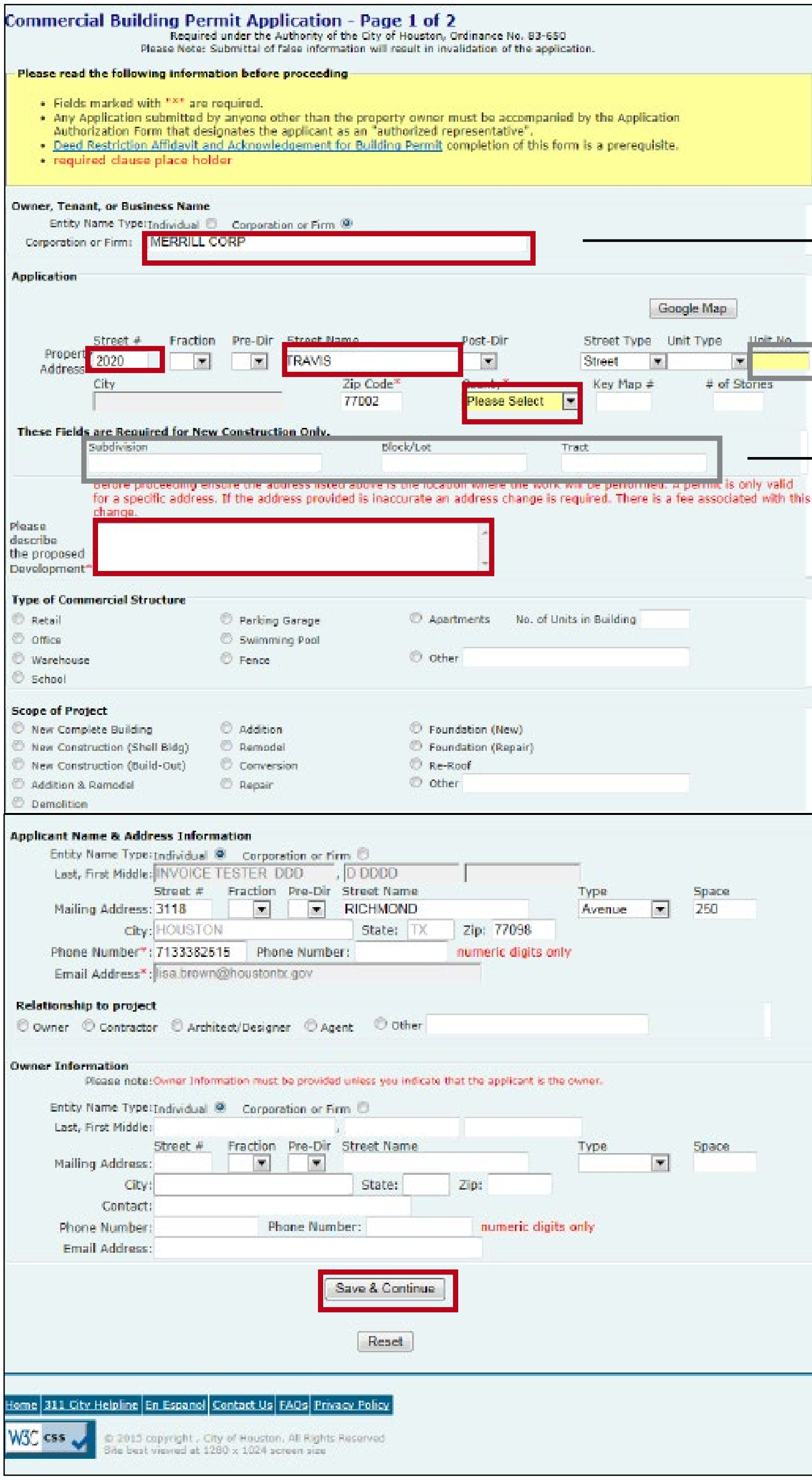
FINDING THE PROJECT'S ADDRESS

Click on the correct address from the generated list to continue.

If the street number is not listed, contact the Permits Section for assistance.

Application Process

COMPLETING A COMMERCIAL BUILDING PERMIT APPLICATION



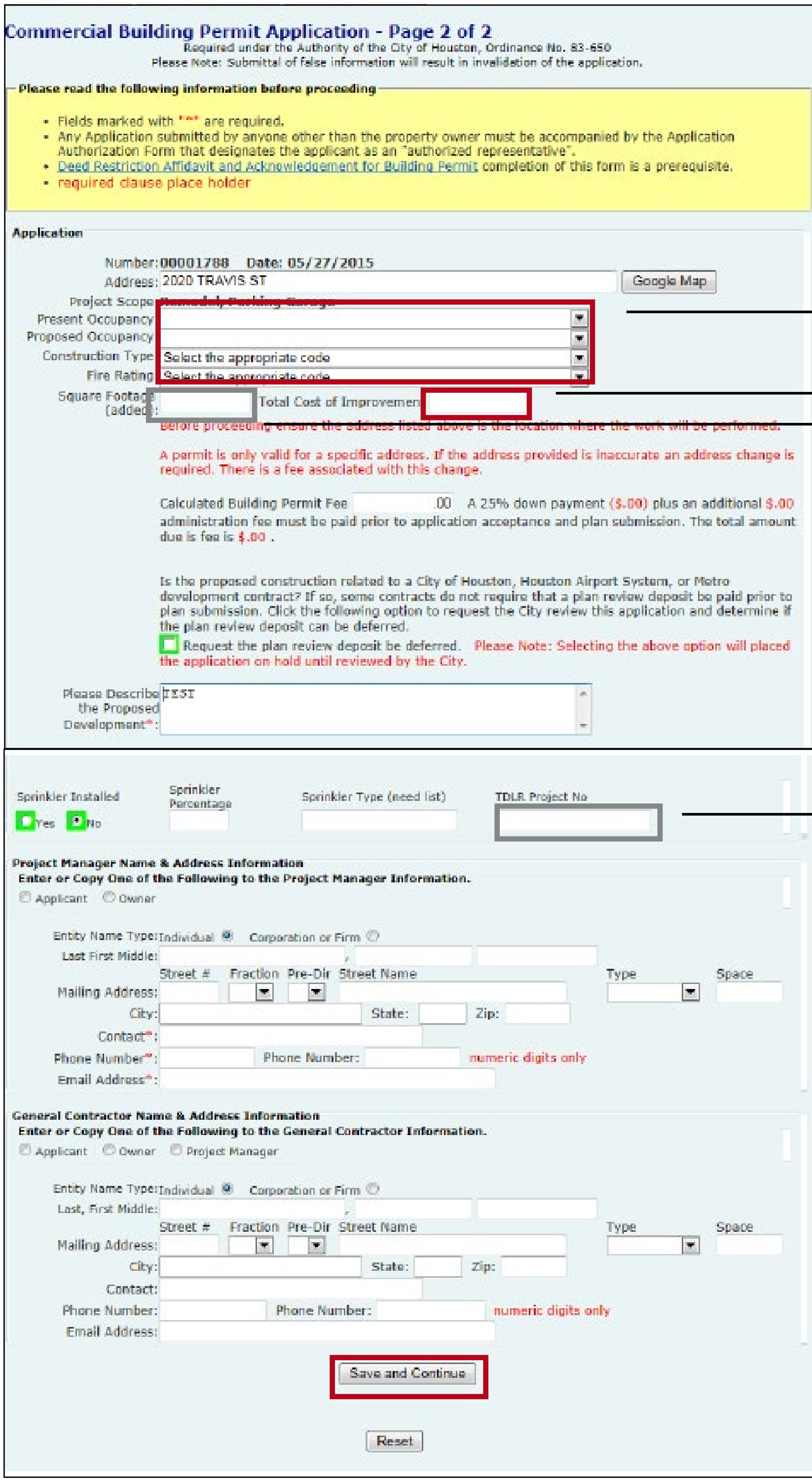
Enter the required information on Page 1. Once complete, click the **Save & Continue** button.

Enter the Business entity information

Fields indicated in grey are only required for new construction.

Application Process

COMPLETING A COMMERCIAL BUILDING PERMIT APPLICATION



Commercial Building Permit Application - Page 2 of 2

Required under the Authority of the City of Houston, Ordinance No. 83-650

Please Note: Submittal of false information will result in invalidation of the application.

Please read the following information before proceeding

- Fields marked with "*" are required.
- Any Application submitted by anyone other than the property owner must be accompanied by the Application Authorization Form that designates the applicant as an "authorized representative".
- Deed Restriction Affidavit and Acknowledgement for Building Permit completion of this form is a prerequisite.
- required clause place holder

Application

Number: 00001788 Date: 05/27/2015

Address: 2020 TRAVIS ST [Google Map]

Project Scope: Remodel, Parking Garage

Present Occupancy:

Proposed Occupancy:

Construction Type: Select the appropriate code

Fire Rating: Select the appropriate code

Square Footage (added): Total Cost of Improvement:

Before proceeding ensure the address listed above is the location where the work will be performed.

A permit is only valid for a specific address. If the address provided is inaccurate an address change is required. There is a fee associated with this change.

Calculated Building Permit Fee .00 A 25% down payment ($.00) plus an additional $.00 administration fee must be paid prior to application acceptance and plan submission. The total amount due is fee is $.00 .

Is the proposed construction related to a City of Houston, Houston Airport System, or Metro development contract? If so, some contracts do not require that a plan review deposit be paid prior to plan submission. Click the following option to request the City review this application and determine if the plan review deposit can be deferred.

Request the plan review deposit be deferred. Please Note: Selecting the above option will placed the application on hold until reviewed by the City.

Please Describe the Proposed Development*: TEST

Sprinkler Installed: Yes No | Sprinkler Percentage | Sprinkler Type (need list) | TDLR Project No

Project Manager Name & Address Information

Enter or Copy One of the Following to the Project Manager Information.

Applicant Owner

Entity Name Type: Individual Corporation or Firm

Last First Middle:

Mailing Address: Street # Fraction Pre-Dir Street Name Type Space

City: State: Zip:

Contact*:

Phone Number*: Phone Number: numeric digits only

Email Address*:

General Contractor Name & Address Information

Enter or Copy One of the Following to the General Contractor Information.

Applicant Owner Project Manager

Entity Name Type: Individual Corporation or Firm

Last, First Middle:

Mailing Address: Street # Fraction Pre-Dir Street Name Type Space

City: State: Zip:

Contact:

Phone Number: Phone Number: numeric digits only

Email Address:

[Save and Continue]

[Reset]

Enter the required information on Page 2. Once complete, click the **Save & Continue** button.

Select the appropriate information from the drop down boxes

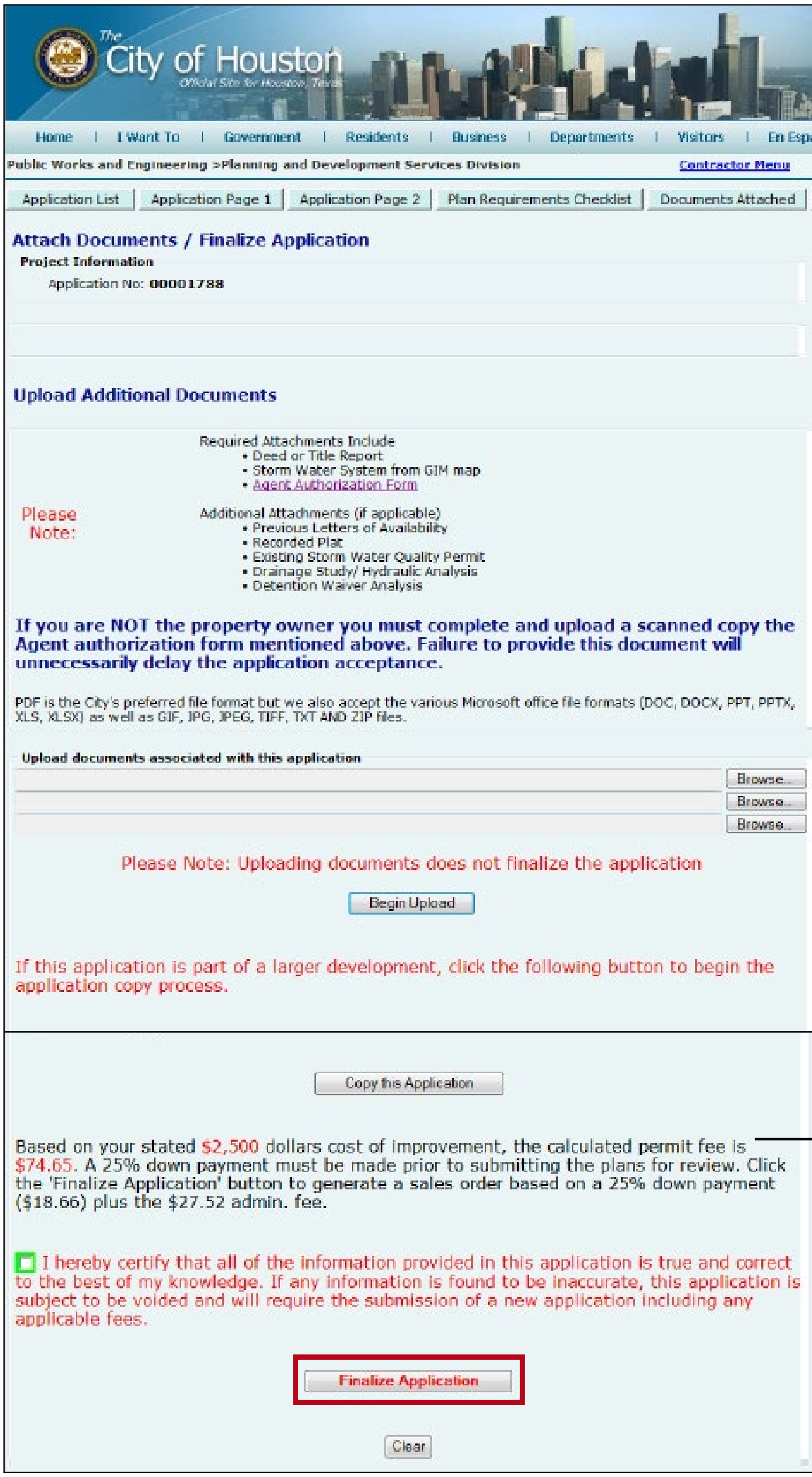
Enter the cost of improvement.

This field is only required when square footage is added.

This field is required for commercial projects over $50,000

Application Process

FINALIZING AN APPLICATION



Do not upload plans on this page.

Upload all required attachments to the building permit application. Up to three files may be uploaded at the same time.

Twenty-five percent of the permit cost is due before submitting an application. The amount due is located here.

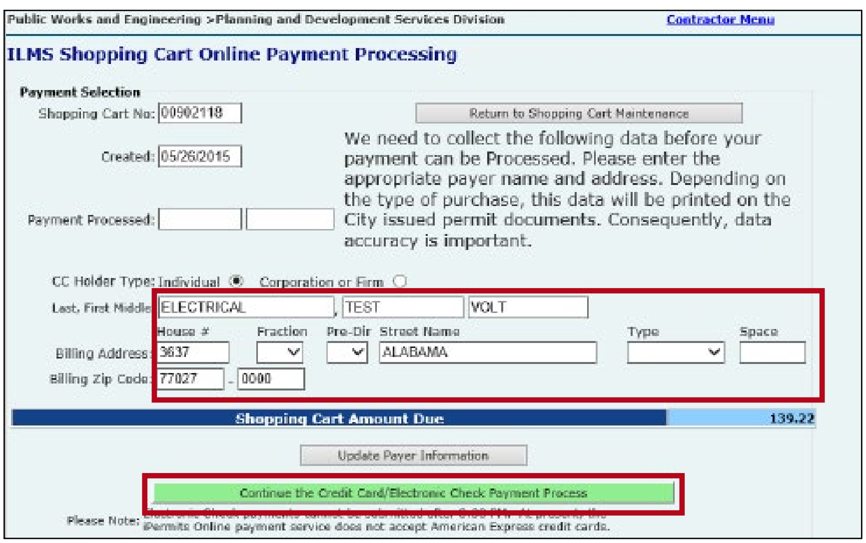
Check the disclaimer box and click the **Finalize Application** button.

Plan Review Deposit Fee

MAKING A PAYMENT

On the Shopping Cart Maintenance screen, check the box of permit(s) to be paid. Then click the **Make Online Payment via Credit Card or Electronic Check** button.

Please note, processed payments are indicated by a project number.



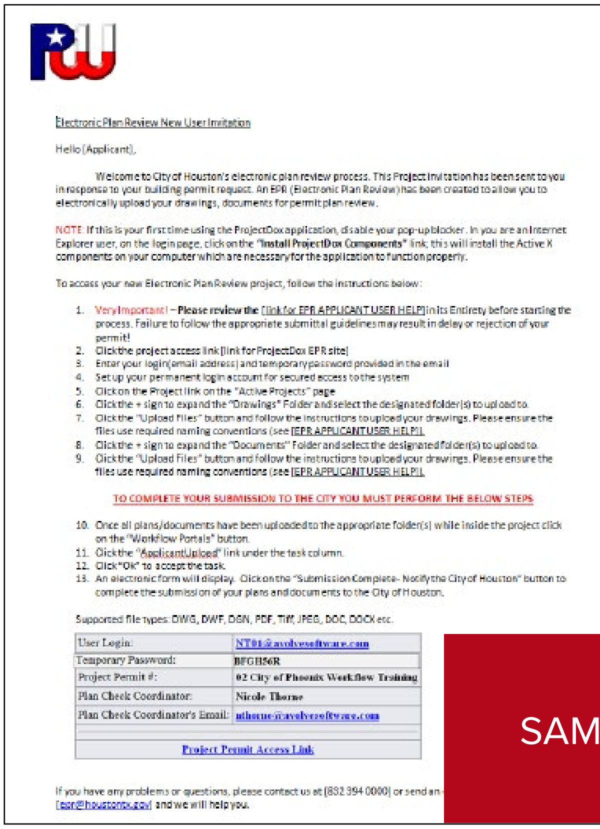
Enter the payer information and click on the Continue the Credit Card/Electronic Check Payment Process button.

When making payment with credit card or electronic check you will be transferred to the Chase® Bank website.

If an Advanced Pay Account (APA) has been established, that payment option will also be listed.

Plan Submittal

NEW USER INVITATION



Electronic Plan Review New User Invitation

Hello [Applicant],

Welcome to City of Houston's electronic plan review process. This Project Invitation has been sent to you in response to your building permit request. An EPR (Electronic Plan Review) has been created to allow you to electronically upload your drawings, documents for permit plan review.

NOTE: If this is your first time using the ProjectDox application, disable your pop-up blocker. In you are an Internet Explorer user, on the login page, click on the **"Install ProjectDox Components"** link; this will install the Active X components on your computer which are necessary for the application to function properly.

To access your new Electronic Plan Review project, follow the instructions below:

1. Very Important! – **Please review the** [link for EPR APPLICANT USER HELP] in its Entirety before starting the process. Failure to follow the appropriate submittal guidelines may result in delay or rejection of your permit!
2. Click the project access link [link for ProjectDox EPR site]
3. Enter your login(email address) and temporary password provided in the email
4. Set up your permanent login account for secured access to the system
5. Click on the Project link on the "Active Projects" page
6. Click the + sign to expand the "Drawings" Folder and select the designated folder(s) to upload to.
7. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see [EPR APPLICANT USER HELP].
8. Click the + sign to expand the "Documents" Folder and select the designated folder(s) to upload to.
9. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see [EPR APPLICANT USER HELP].

TO COMPLETE YOUR SUBMISSION TO THE CITY YOU MUST PERFORM THE BELOW STEPS

10. Once all plans/documents have been uploaded to the appropriate folder(s) while inside the project click on the "Workflow Portals" button.
11. Click the "ApplicantUpload" link under the task column.
12. Click "Ok" to accept the task.
13. An electronic form will display. Click on the "Submission Complete- Notify the City of Houston" button to complete the submission of your plans and documents to the City of Houston.

Supported file types: DWG, DWF, DGN, PDF, Tiff, JPEG, DOC, DOCX etc.

User Login:	NT01@avolvesoftware.com
Temporary Password:	BFGH56R
Project Permit #:	02 City of Phoenix Workflow Training
Plan Check Coordinator:	Nicole Thorne
Plan Check Coordinator's Email:	nthorne@avolvesoftware.com
Project Permit Access Link	

If you have any problems or questions, please contact us at [832 394 0000] or send an [epr@houstontx.gov] and we will help you.

SAMPLE INVITATION

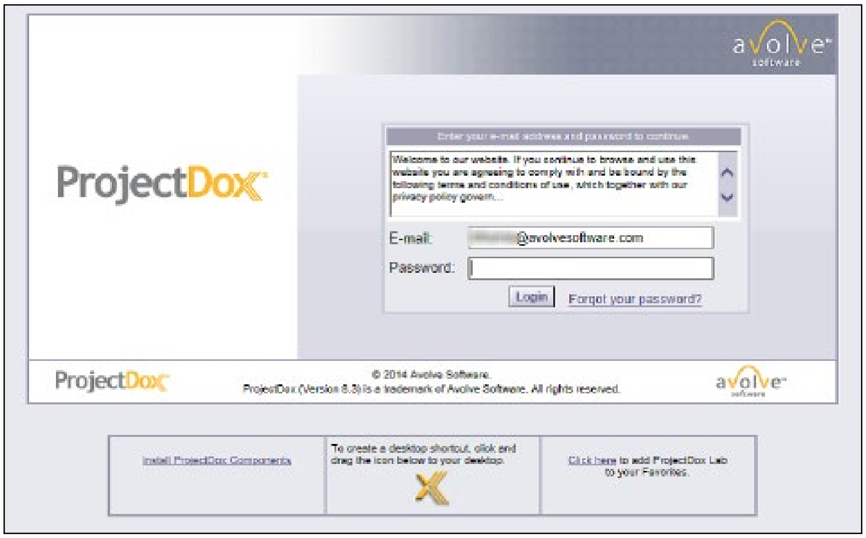
When the application and plan review deposit has been paid, an invitation (see above) will be sent to the user to upload the plans.

First time users should note:

- ProjectDox uses pop-up windows (browser windows with no toolbars). If you login but no ProjectDox window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You need to allow pop-ups for the ProjectDox site (pop-up blockers can be configured to allow pop-ups for specified sites).
- The login page has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary ProjectDox ActiveX controls. Click the **Install ProjectDox Components** link to run the installation. Alternatively, your network administrator or IT department may use other methods to install the components.
- The login page also typically has a link for adding a desktop shortcut to the ProjectDox site, and a link for adding it to your favorites.

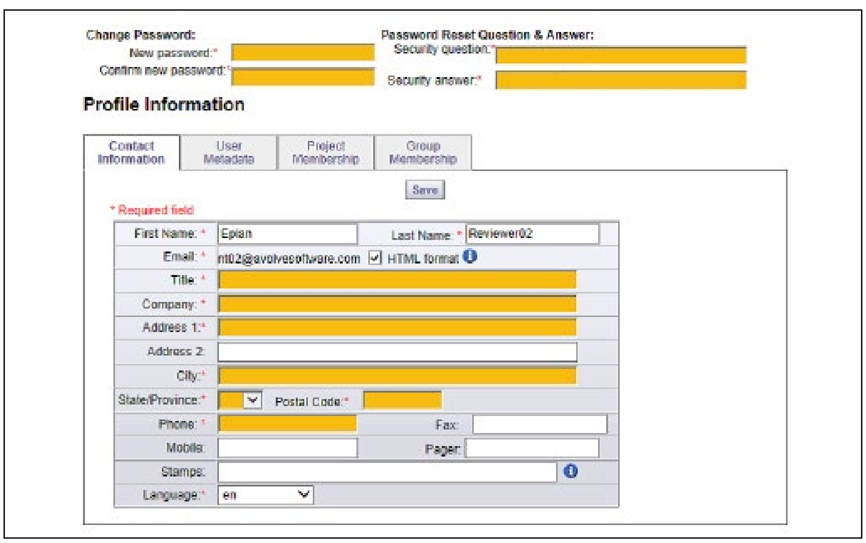
Plan Submittal

LOGGING IN



From the invitation, click on the link **Login to ProjectDox**. This will automatically open a web browser and take you directly to the login screen. You can also open a web browser and type in your ProjectDox URL.

Type or paste the temporary password into the Password Field and click **Login**. The password is case sensitive.



You will be taken to your User Profile, where you will need to

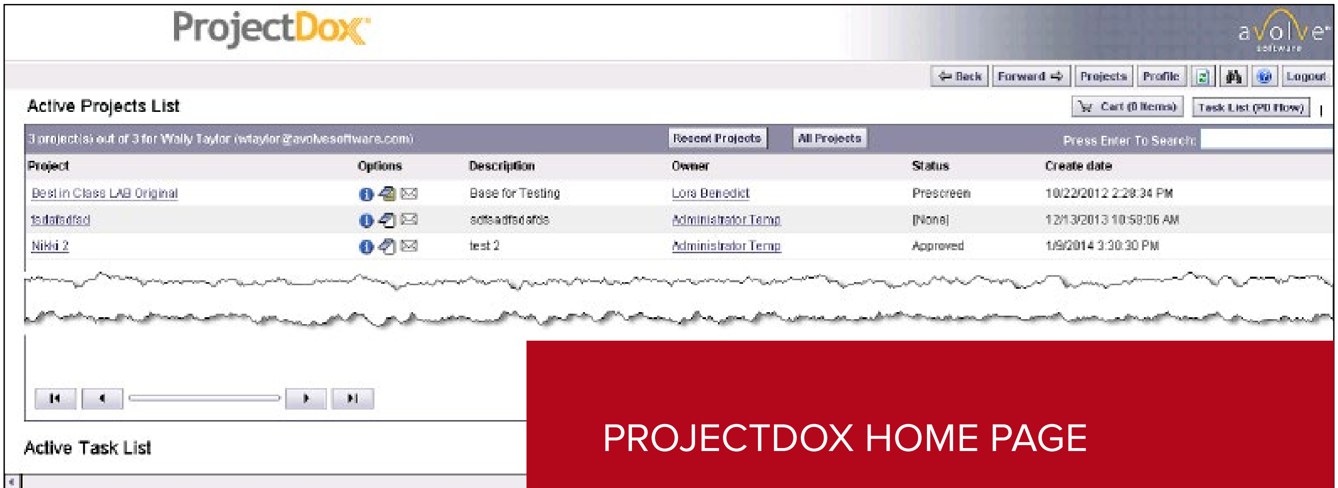
- Reset your password
- Create a security question and answer
- Enter some additional information about yourself.

Fill in all of required fields and click **Save**.

You can return to this screen at any time by clicking on the **Profile** button on the Main Toolbar

Plan Submittal

LOGGING IN



PROJECTDOX HOME PAGE

After saving your profile information, you will be taken to the Home Page where your list of Active Projects will display. If using ProjectDox workflow, then assignments, referred to as tasks may also display on home page in the Active Task List.

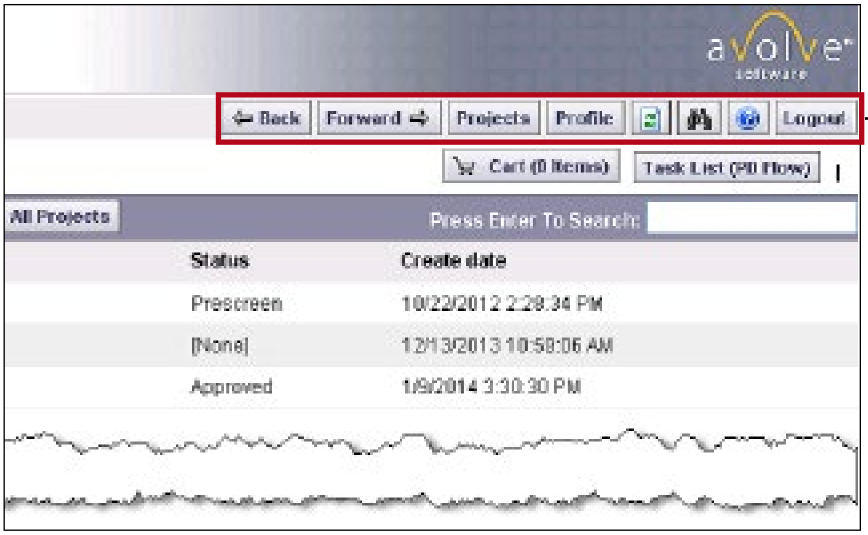
Logging into ProjectDox a second time (and every time after that), you will use the password that you entered in your User Profile page. After logging in, you will be taken to your home page. From this page, you can view all of the projects you have been invited to and all tasks for you to complete.

If you ever forget your password, click on the **Forgot Your Password?** link next to the "Login" button. The use of the "Forgot Your Password?" link requires that the user has logged in at least once and no longer has a temporary password associated to their account.

ProjectDox can be used in multiple browsers, including Chrome, FireFox, and Internet Explorer. Installation of ActiveX components is only required when using an Internet Explorer browser.

Navigation Basics

HOME PAGE TOOLBAR



This group of buttons provide your primary navigation functions.

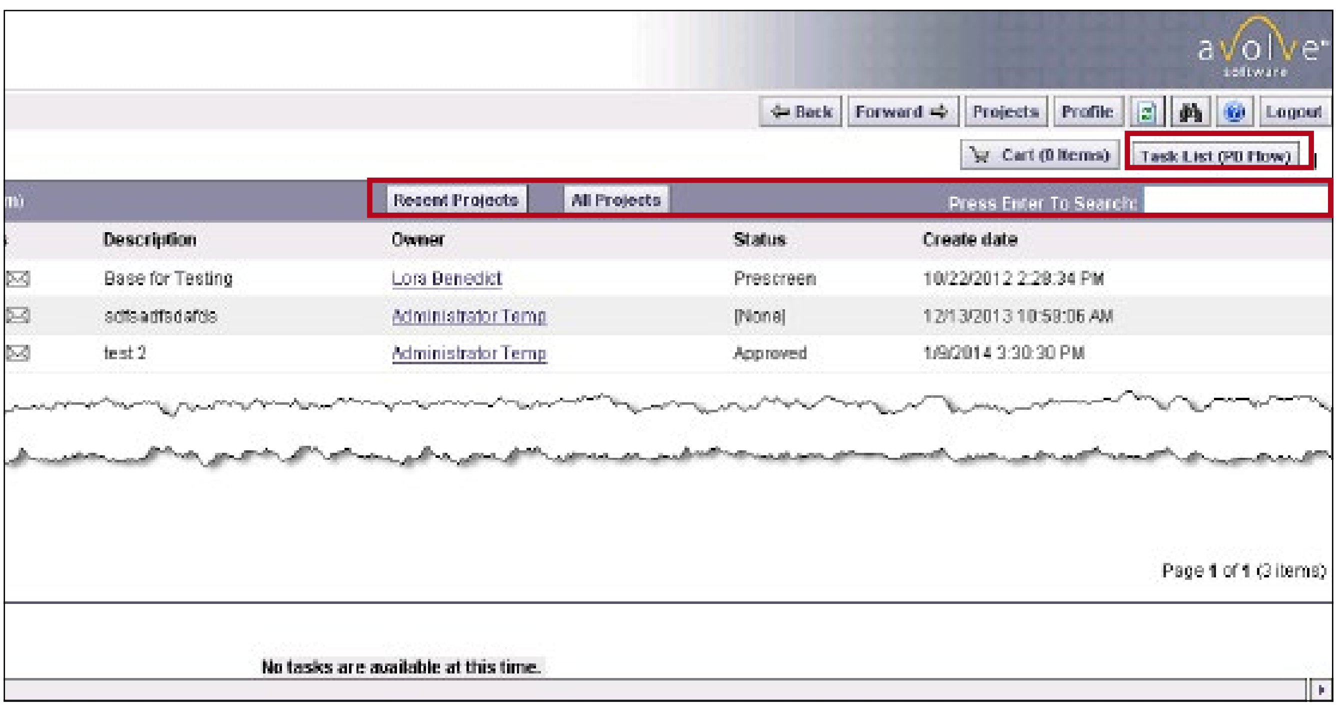
Going from left to right the buttons are:

- The **Back** and **Forward** buttons function much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed.
- The **Projects** button will take you back to the home page where your list of active projects and tasks will display.
- The **Profile** button will take you to your User Profile, where you can edit your personal information or change your password.
- The **Reload** button will refresh the current page you are on.
- The **Search** button allows you to search for a project based on the key information entered into the Project Info Page, or it allows you to search for keywords within a project.
- The **Help** button takes you to the ProjectDox Help site. Use the index or search functions to find instructions on specific aspects of ProjectDox
- The **Logout** button logs you out of ProjectDox.

Navigation Basics

PROJECT TOOLBAR

- The “Recent Projects” button will show the 15 most recently accessed projects with the most recent project accessed always displaying at the top.
- After conducting a project search, you can view all of your projects again by clicking on the “All Projects” button.
- The Project Search Field feature is a partial word search and will provide results that contain the words entered into the Search Field for any of the columns listed: Project, Description, Owner, and Status.
- The Active Projects List provides you with basic information about every project to which you are assigned. You can sort your projects by name (or number), description, owner or status by clicking the header of each of the columns or you can access a project by clicking on the project link which will direct you to the project’s main page. Hovering over a Project Name displays the date when the project was created
- The **Task List** button shows any tasks requiring action from you for all projects in a separate page.



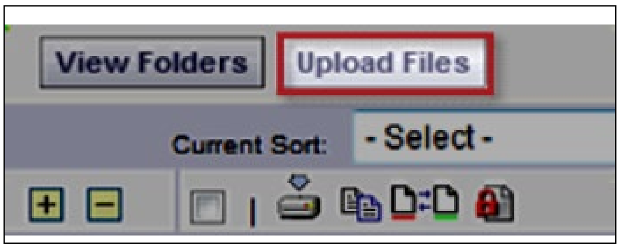
The Project List and the Task List are set to display a limited number of entries at a time. Use these buttons  to move to the previous, next, first, or last page.

Uploading Your Files

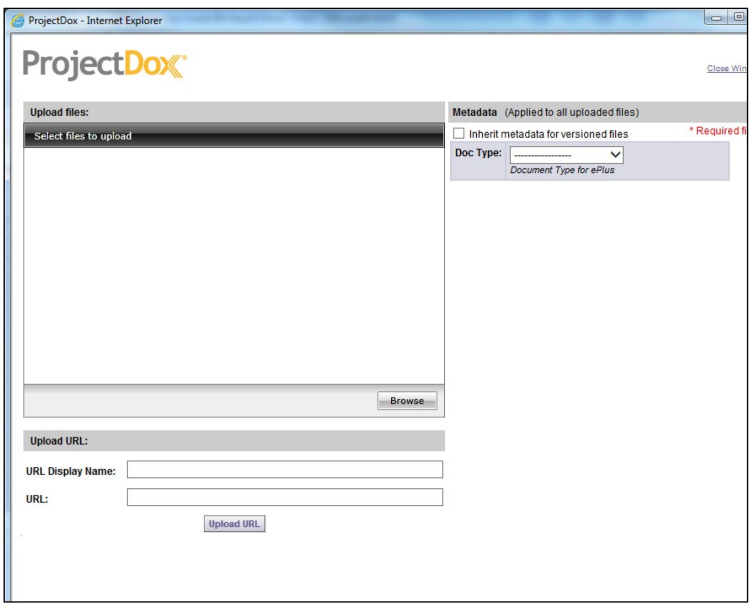
STEP BY STEP

After you have successfully logged into ProjectDox, the projects screen will display. Any projects for which you have access will display in the list. Any outstanding tasks that require your action are displayed in the My Task List area below the project list.

Select the project for which you want to upload the plan drawings/documents. Click the **Drawings** folder to upload your plan drawings and **Documents** folder to upload other project documents.



1. From the Project page select the folder where you want to upload your file.
2. Click the **Upload Files** button (next to View Folders)
3. The Upload Files dialog will appear.



1. Click the **Browse...** button.
2. In the resulting dialog box, navigate to and select the file to upload. Note: a file name is limited to 70 characters.
3. Click Open to add the file.
4. You'll be taken back to the Uploader dialog box. Click **Reset Fields** to clear all file selections, or **Upload** to upload the files to the folder.

Once the files are uploaded to the folder(s), thumbnail images of all the files will be visible. Under each thumbnail, you can see the filename, upload date and time, file size information, and name of the user who uploaded that file.

Want to upload more than five files at a time? Download load Silverlight to use the drag and drop batch upload feature.

Standards

FILE TYPES AND BORDERS

REQUIRED FILES

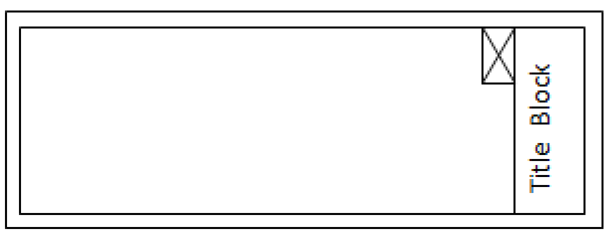
1. A fully completed commercial application for plan review
2. Prerequisite check list must be included with the application

FILE TYPE STANDARDS

- Only searchable PDF files are accepted for calculations, reports, and other supporting documentation (non-drawing files).
- Vector PDF, DWG, DGN etc. files will be acceptable for drawings.

BORDER STANDARDS

- 1" clear border with a 4 ½" title block
- Reserve 2 ½ W X 3 ½ H area on the upper right corner of the drawing (as shown below).
- The City of Houston requires that plans be uploaded in an approved format, to scale, with an output dimension of 24" X 36".



MARKUP NAME AND COLOR STANDARDS

Standard markup names and colors will be used for each reviewing discipline for easy identification. A markup can have more than one changemarks. Changemarks are created to quickly identify a markup and associated comments.

Standards

FILE NAMING

File names for drawings submitted for electronic plan review should include the first character of the discipline name, followed by the 3 digit sheet number. If decimals are needed in the sheet number, place decimal after the 3rd digit, ex. S.001.99

Corrected files should always be resubmitted with the SAME FILE NAME as the original submittal. **Note: If this standard is not followed the submitted file will appear as a NEW file, and not a correction to an existing file.**

Drawing Type	Discipline	Sheet No.	Example
Demo	D	000-999	D.000
Architectural	A	000-999	A.001
Landscape			
Structural	S	000-999	S.002
Electrical	E	000-999	E.004
Plumbing	P	000-999	P.005.99
HVAC (Mechanical)	M	000-999	M.003
Health	H	000-999	K.006
Civil Storm drainage Mitigation, if applicable	C	000-999	C.007
Electric locks			
Fire Marshal Haz-Mat High Pile Standpipes Alarm Sprinklers	F SP FA FS	 000-999 000-999 000-999	 SP.007 FA.008 FS.009

Standards

FOLDER STRUCTURE

All drawings should be uploaded into the **Drawings** folder for each project
All documentation (any non-drawing files, geotechnical reports etc.) should be uploaded into the **Documents** folder.

1. **DRAWINGS**
   - Demo
   - Architectural
   - Landscape
   - Structural
   - Electrical
   - Plumbing
   - HVAC
   - Civil
     - Storm Drainage
     - Mitigation if applicable
     - Water Wastewater
   - Health Equipment
   - Electric Locks
   - Fire Marshal
     - Haz-Mat
     - High Pile
     - Standpipes
     - Alarm
     - LP Gas/Natural Gas
   - Fire Suppression
     - Sprinklers
     - Underground Fire Line
2. **DOCUMENTS**
   - Application
   - Pre Requisite Check List
   - Utility Letter(s)
   - Energy Forms
   - Manufacturing Specs
   - Geotechnical Reports
   - Asbestos Survey
   - ARA Application
   - Owner Statement of Intended Use
   - Occupant Reduction Letter
   - Miscellaneous
3. **APPROVED**
4. **CHANGEMARK REPORTS**
5. **PDF DESTINATION FOLDER**

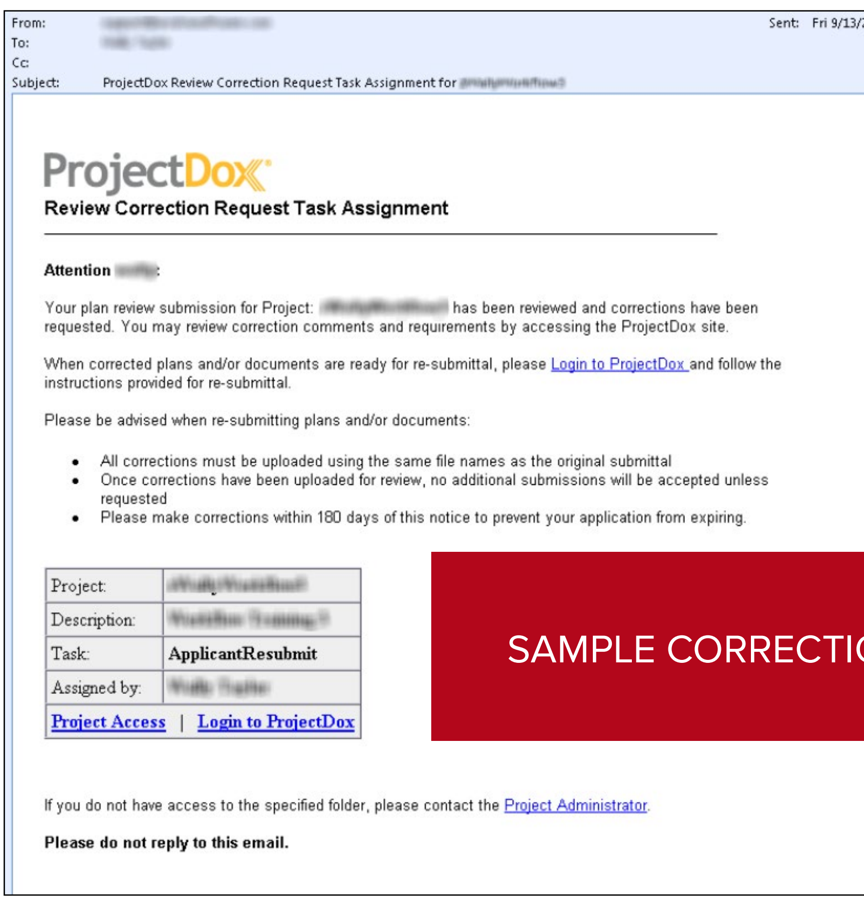
Review of Plans

PRE-SCREEN REVIEW PROCESS

The Prescreen Review step is used to review the uploaded documentation in the project prior to assigning the review to the departments.

Review Coordinator navigates to the folders and reviews the uploaded files. When no additional information or corrections are required from you and the submittal is ready to be routed to the departments for the formal review process begins. If you have met all the submittal requirements, you will receive a **Prescreen Approved** email. Once the prescreen review is approved, an email notification is sent to the Coordinator group. Coordinator assigns the review to all the required departments.

If items are missing, or corrections are required from you before formal review can begin, a **Prescreen Rejected** email will be sent to you with instructions on how to resubmit to fix the issues. The review coordinator can provide information about the submittal issues or add comments to the check list, and can also attach supporting documents for you to review.



From:
To:
Cc:
Subject: ProjectDox Review Correction Request Task Assignment for

Sent: Fri 9/13/2

ProjectDox

Review Correction Request Task Assignment

Attention :

Your plan review submission for Project: has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please Login to ProjectDox and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	
Description:	
Task:	**ApplicantResubmit**
Assigned by:	
Project Access | Login to ProjectDox	

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

SAMPLE CORRECTIONS EMAIL

Review of Plans

CORRECTIONS COMPLETE

You received a prescreen rejected email with the submittal issues and requests for more information and/or correction of information prior to the departments being assigned.

Follow these steps below to complete this task.

1. Select the **Login to ProjectDox** link in the email to log in to ProjectDox.
2. Select the **CorrectionComplete** link for the appropriate project from the Task List on the main project page or from within the project. This can also be accessed via the global task lists.
3. A dialog box displays, *Do you want to accept this task?*. Select **OK** to accept responsibility for completing the task.
4. Review the comments (if provided) in the text box and the items in the checklist by selecting either the **View Intake Checklist** link or the **Checklist Report** tab. Both display the number of items included in the Checklist.

   a) Revisions of documents should be uploaded using the same name as the original file to allow for automated versioning of the file to occur.
5. Select the check box to indicate corrected items/documents have been uploaded. You can also add comments. This action enables the **Corrections Complete** button to become enabled.
6. Select the **Corrections Complete** button.
7. Select **OK** to the dialog message, *Completing this task will finish your participation in this step and cannot be undone. Continue?*

   a) Select **Cancel** to return to the eForm.

   b) Select the **OK** button to complete the task and perform the following:

   - eForm closes.
   - Task removed from Applicant's task list.
   - Email notification sent to the Review Coordinator Group to perform the prescreen review again.
8. Review Coordinator reviews the corrections. When no additional information is required from you, review coordinator approves the prescreen review. If more corrections are required, correction complete step will be repeated.

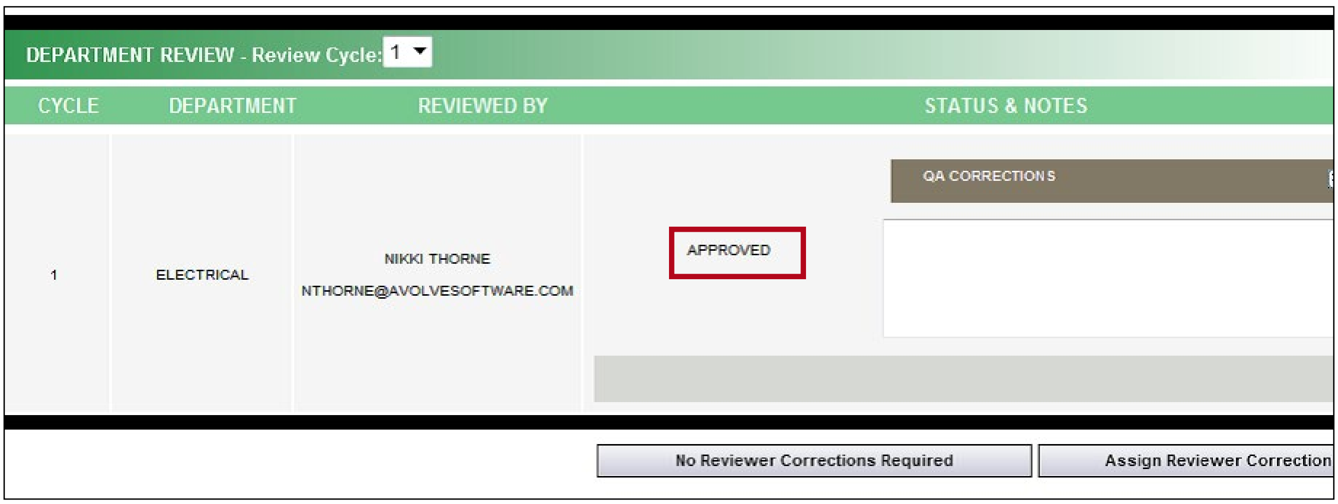
Review of Plans

APPROVAL OR CORRECTIONS REQUIRED

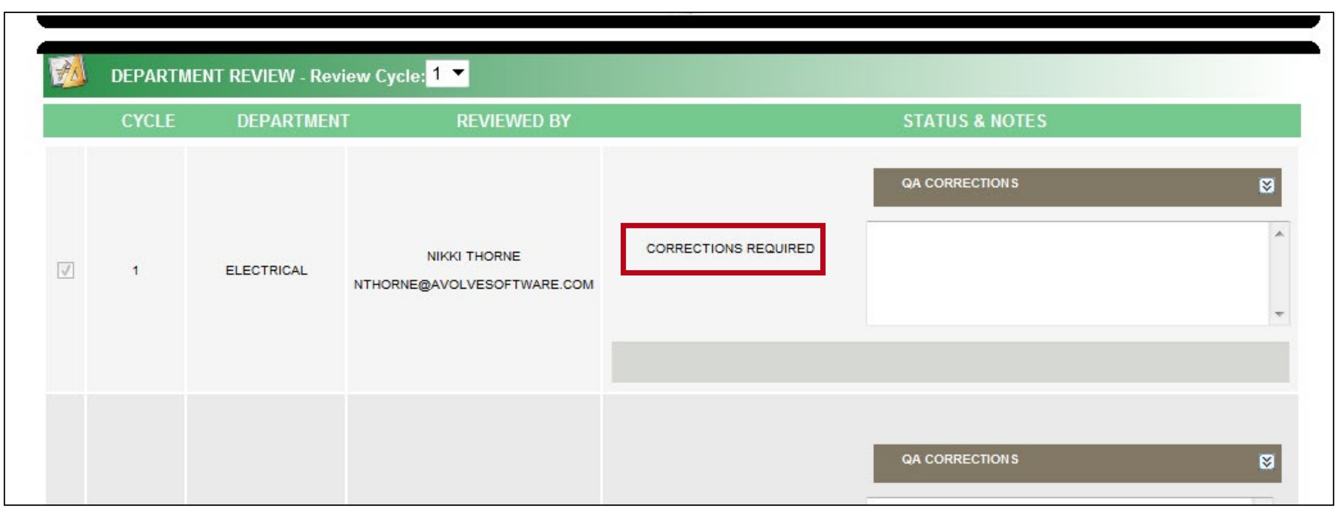
Each department performs the review and adds a status, check list comments, free form comment and/or markup to the drawings. Each department can approve or reject their review.

After all the assigned departments from the Department Review step have completed their task, the review coordinator informs you whether the plan review is approved or corrections are required.

If all reviews have been approved, Review QA Coordinator applies the final City of Houston approval stamp and you will be notified for the final payment. You will receive an **Approval – Pending Payment** email with the instructions.

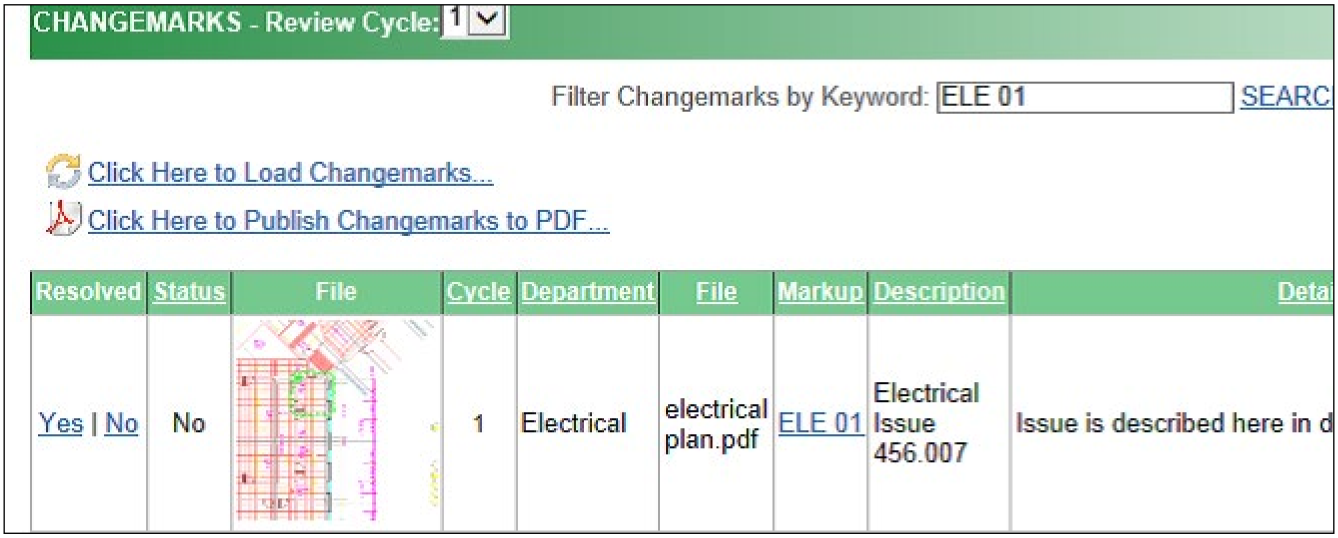


If at least one reviewer has selected “Corrections Required”, you will receive an email notification of the resubmit task. If you don’t respond in 14 days, you get an email alert of the pending task.



Review of Plans

UPLOADING CORRECTIONS



If **Corrections Required** was selected, you will receive an email notification of the resubmit task assigned to you and a task added to your task list.

Follow these steps to complete the task:

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit** link from the Task List shown under the column heading of Task.

   a) This can be done from the global or project specific task lists.
3. A dialog box displays, *Do you want to accept this task?*. Select **OK** to accept responsibility for completing the task.

   a) Status column on the Task List updates from Pending to Accepted.
4. Applicant should review:

   a) Comments provide by the plan reviewers and provide responses as required.

   b) View Checklist Items on the Checklist tab

   c) Markups provided in the Changemark Section
5. Make required corrections and upload the documents to ProjectDox using the same naming convention as the original file.
6. In the Task Instructions section, select the check boxes to indicate the items have been completed. Selection of all 3 boxes enables the **Review Complete** button.
7. Select the **Review Complete** button.

- Click **OK** to the dialog message to complete the task, close the eForm
- Click **Cancel** to remain on the current view.

Selection of the **Complete** and **OK** buttons will finish the task for you, close the eForm and remove the task from your task list.

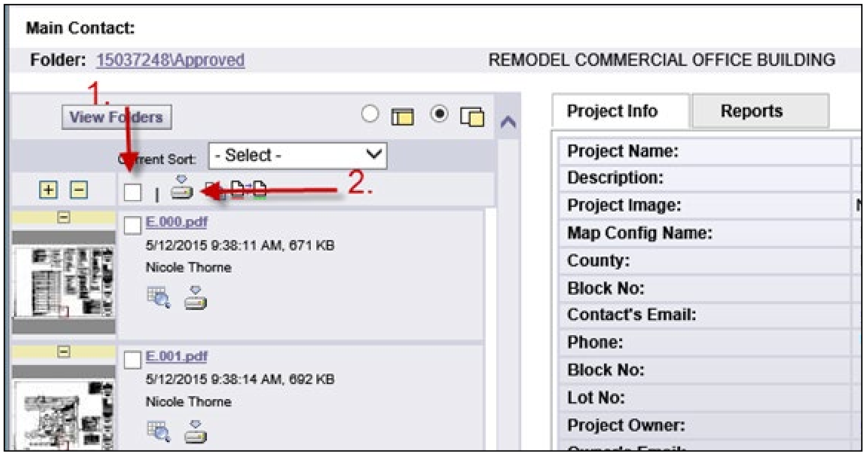
An email notification will be sent to the Review Coordinator assigning them to the step **Resubmit Received**. The Review Coordinator will confirm that plans have been uploaded and the proper departments are selected for assignment for the next review cycle.

If any one of the departments rejects the review, **Applicant Resubmit** step will be repeated until all the departments approve.

Print

APPROVED PLAN SET

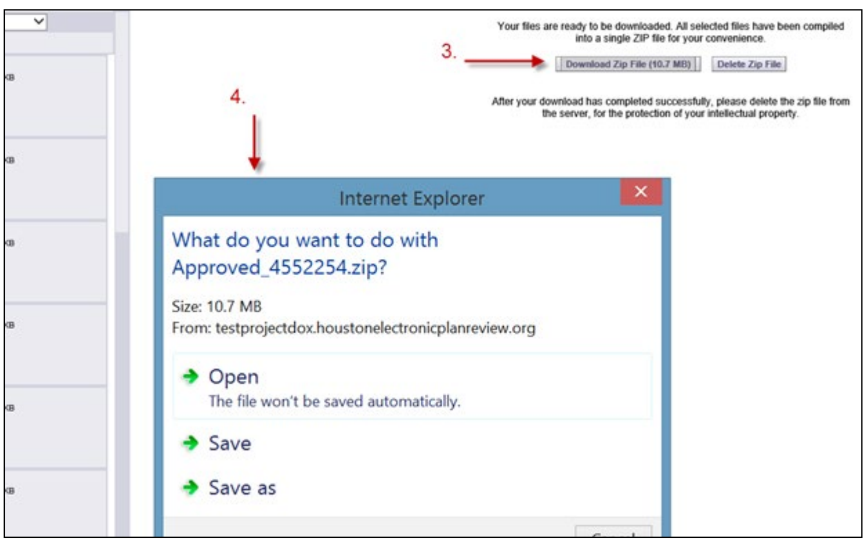
After final payment is made, you will receive an email indicating that your application has been paid in full and that you may access your approved drawings and documents in the ProjectDox folder marked **Approved**.



To download the entire folder, select the box at the top of the thumbnails.

Uncheck any pages that you do not want to download.

When your selection is complete, click on the download icon.



A single zip file will be created of the selected pages.

Click the **Download Zip File** button to continue. Select Save or Save As in the pop-up window.

The approved plan set must be printed in color at a minimum size of 24"x36" and kept on the jobsite throughout the duration of construction.

?

Each page of the approved plan set will be stamped with the City of Houston seal in red, and a cover sheet will be stamped by each individual reviewer.

Thanks for using electronic plan review!

If you need further assistance, please contact us via email at **houston.permittingcenter@houstontx.gov.**

Live chat is available during regular business hours (8am - 5pm) at **www.hpceservices.org**.

HOUSTON PERMITTING center

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