



User Guide

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

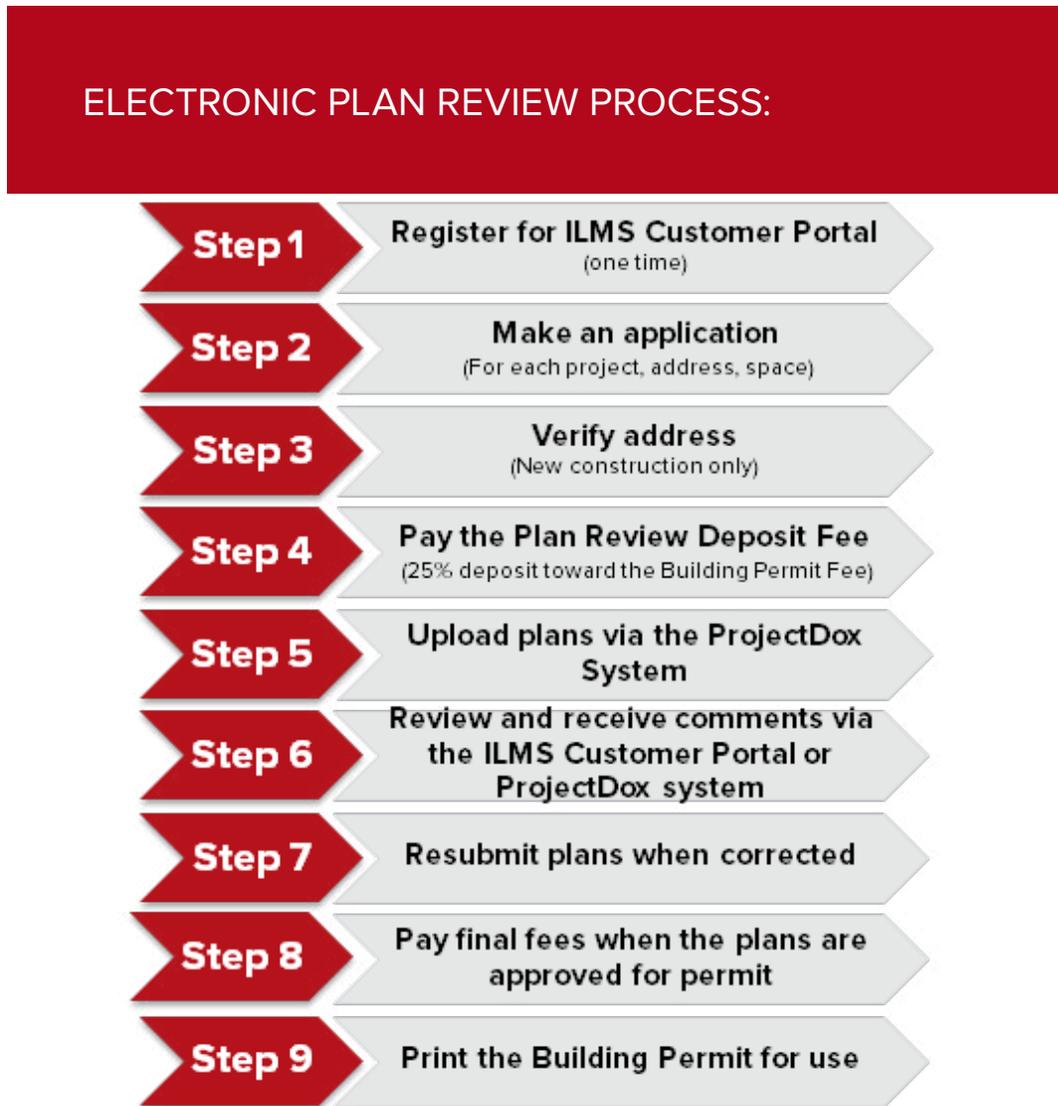
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Overview

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.



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	<p>NON-LICENSED USERS</p> <ol style="list-style-type: none">1. Visit http://www.pdinet.pd.houstontx.gov/ILMS_Online_Permits/default.asp2. Click on the link First Time User? Click here to register3. Click No when asked, <i>Are you associated with an electrical, plumbing, or mechanical trade contractor?</i>4. Click No when asked, <i>Are you associated with a Texas state licensed engineering firm?</i>5. Click No when asked, <i>Do you have a City of Houston iPermits advanced payment account?</i>6. Click the Submit button7. Enter the required user information and click the Submit Add button <p>LICENSED USER <i>(Advanced Pay Account Holders)</i></p> <ol style="list-style-type: none">1. Submit an iAcknowledgement form by one of the following methods:<ul style="list-style-type: none">• 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

The screenshot shows the 'Commercial Building Project Application - Address Search' page. It features a search bar with the text 'ADDRESS SEARCH OR ASSIGNMENT'. Below the search bar, there is a note: 'All Building permit applications will be associated with a specific address. Using the below search feature, enter the physical address of where the work will be performed.' It also provides contact information for permit assistance: 'Permit_office@houstontx.gov' or call 832.394.8899. A 'Note' section states: 'Do not enter street directions, (e.g., N., S., W., etc.) Do not enter street types (e.g., Rd., Dr., etc.)'. There are two input fields: 'Street No:' and 'Street Name:'. A 'Search for Address' button is located below the fields.

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.

The screenshot shows the 'iPermits Web Portal - Address Search' page. It displays a message: 'Your Property Address search returned the following Street Names. Click on the appropriate street name. If your Street Name does not appear on the list, contact the City of Houston permit section at (832) 394-8899 for assistance.' Below this is a 'Street List' section with a table titled 'Qualified Street Names' and a sub-header 'Address'. The table contains two rows: 'MAIN AVE' and 'MAIN ST'. The 'MAIN ST' row is highlighted with a red box. Below the table, there is a button that says 'The needed street name is not listed' and a 'Back' 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

Home | I Want To | Government | Residents | Business | Departments | Visitors | En Español

Public Works and Engineering > Planning and Development Services Division [Contractor Menu](#) [Log Off](#)

Building application property address search

Your Property Address inquiry has qualified the following Addresses. Click on the appropriate Address.

Suits, Floor, Building Number Not Listed:
If your exact address (including the Space) does not appear in the list, click one that matches your Street Number.

Street Number Not Listed:
If your Street Number does not appear in the list, contact the City of Houston.

Address List

Qualified Addresses	
Address	Name on Situs
3300 MAIN ST	CITY OF HOUSTON CODE ENFORCEMENT
3300 MAIN ST 1	CITY OF HOUSTON
3300 MAIN ST 1024	CITY OF HOUSTON
3300 MAIN ST 121	*
3300 MAIN ST 2002	NEW YEAR, PROJECT NUMBER
3300 MAIN ST 22	
3300 MAIN ST 44	SSSSS
3300 MAIN ST BLD20	FAY IMPELANCE
3300 MAIN ST BLD21	WHALEY, CONNIE
3300 MAIN ST BLD20	CITY OF HOUSTON
3300 MAIN ST BLD21	
3300 MAIN ST BLD22	
3300 MAIN ST BLD23	

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

Commercial Building Permit Application - Page 1 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 Acknowledgment for Building Permit](#) completion of this form is a prerequisite.
- [required clause place holder](#)

Owner, Tenant, or Business Name
Entity Name Type: Individual Corporation or Firm
Corporation or Firm:

Application

Street # Fraction Pre-Dir Street Name Post-Dir Street Type Unit Type Unit No.

City Zip Code* Key Map # # of Stories

These Fields are Required for New Construction Only.

Subdivision Block/Lot Tract

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.

Please describe the proposed Development*

Type of Commercial Structure

Retail Office Warehouse School Parking Garage Swimming Pool Fence Apartments Other:

No. of Units in Building

Scope of Project

New Complete Building New Construction (Shell Bldg) New Construction (Build-Out) Addition & Remodel Demolition Addition Remodel Conversion Repair Foundation (New) Foundation (Repair) Re-Roof Other:

Applicant Name & Address Information

Entity Name Type: Individual Corporation or Firm
Last, First Middle:
Street # Fraction Pre-Dir Street Name Type Space
Mailing Address:
City: State: Zip:
Phone Number*: Phone Number: numeric digits only
Email Address*:

Relationship to project

Owner Contractor Architect/Designer Agent Other:

Owner Information

Please note: Owner Information must be provided unless you indicate that the applicant is the owner.

Entity Name Type: Individual Corporation or Firm
Last, First Middle:
Street # Fraction Pre-Dir Street Name Type Space
Mailing Address:
City: State: Zip:
Contact:
Phone Number: Phone Number: numeric digits only
Email Address:

[Home](#) [City Helpline](#) [En Espanol](#) [Contact Us](#) [FAQs](#) [Privacy Policy](#)

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Site best viewed at 1280 x 1024 screen size.

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 Acknowledgment 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

Project Scope:
Present Occupancy:
Proposed Occupancy:
Construction Type:
Fire Rating:
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: A 25% down payment (\$0.00) plus an additional \$0.00 administration fee must be paid prior to application acceptance and plan submission. The total amount due is \$0.00.

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*:

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:
Street #: Fraction: Pre-Dir: Street Name: Type: Space:
Mailing Address:
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:
Street #: Fraction: Pre-Dir: Street Name: Type: Space:
Mailing Address:
City: State: Zip:
Contact:
Phone Number: Phone Number: numeric digits only
Email Address:

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

The City of Houston
Official Site for Houston, Texas

Home | I Want To | Government | Residents | Business | Departments | Visitors | En Espa

Public Works and Engineering > Planning and Development Services Division [Contractor Menu](#)

Application List | Application Page 1 | Application Page 2 | Plan Requirements Checklist | Documents Attached

Attach Documents / Finalize Application

Project Information
Application No: **00001788**

Upload Additional Documents

Please Note:

Required Attachments Include

- Deed or Title Report
- Storm Water System from GIM map
- [Agent Authorization Form](#)

Additional Attachments (if applicable)

- Previous Letters of Availability
- Recorded Plat
- Existing Storm Water Quality Permit
- Drainage Study/ Hydraulic Analysis
- Detention Waiver Analysis

If you are NOT the property owner you must complete and upload a scanned copy of the Agent authorization form mentioned above. Failure to provide this document will unnecessarily delay the application acceptance.

PDF is the City's preferred file format but we also accept the various Microsoft office file formats (DOC, DOCX, PPT, PPTX, XLS, XLSX) as well as GIF, JPG, JPEG, TIFF, TXT AND ZIP files.

Upload documents associated with this application

Browse...
Browse...
Browse...

Please Note: Uploading documents does not finalize the application

Begin Upload

If this application is part of a larger development, click the following button to begin the application copy process.

Copy this Application

Based on your stated \$2,500 dollars cost of improvement, the calculated permit fee is **\$74.65**. A 25% down payment must be made prior to submitting the plans for review. Click the 'Finalize Application' button to generate a sales order based on a 25% down payment (\$18.66) plus the \$27.52 admin. fee.

I hereby certify that all of the information provided in this application is true and correct to the best of my knowledge. If any information is found to be inaccurate, this application is subject to be voided and will require the submission of a new application including any applicable fees.

Finalize Application

Clear



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

iPermits Shopping Cart Maintenance
Sales Order Payment Selection

Shopping Cart No: 00902118
Created: 05/26/2015

The following Sales Order(s) are pending payment. Check the selection box of the ones that you wish to pay at this time.

Sales Order	Type	Date	Holds Appud	Customer / Contractor of Record (Permit emailed to)	Fee / Amount Paid	Select to Pay
00955244	Plan Review Deposit	26-MAY-2015	No Holds	3000 MAIN ST	\$139.22	<input checked="" type="checkbox"/>
00883531	Pre-Configured Permit	09-JAN-2015	Project has been Final	2050 WEST SAM HOUSTON SOUTH PKY # 900 ILMS Project No: 14110597	\$283.66	<input type="checkbox"/>
00894437	New Single Trade	22-JAN-2015	Pending Fee configuration	1000 WASHINGTON AVE # 1001	\$4.00	<input type="checkbox"/>
00897942	New Single Trade	28-JAN-2015	Pending Fee configuration	1000 WASHINGTON AVE # 1001	\$4.00	<input type="checkbox"/>
00942263	Pre-Configured Permit	24-MAR-2015	Pending Fee configuration	230 HARRISNESS ST # A ILMS Project No: 13112339	\$4.00	<input type="checkbox"/>
Shopping Cart Amount Due					\$139.22	

Make Online Payment via Credit Card or Electronic Check

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.

Public Works and Engineering > Planning and Development Services Division Contractor Menu

ILMS Shopping Cart Online Payment Processing

Payment Selection
Shopping Cart No: 00902118
Created: 05/26/2015

We need to collect the following data before your payment can be Processed. Please enter the appropriate payer name and address. Depending on the type of purchase, this data will be printed on the City issued permit documents. Consequently, data accuracy is important.

Payment Processed: [] []

CC Holder Type: Individual Corporation or Firm

Last, First Middle: ELECTRICAL TEST VOLT

Billing Address: House # 3637 Fraction [v] Pre-Dir [v] Street Name ALABAMA Type [v] Space []

Billing Zip Code: 77027 - 0000

Shopping Cart Amount Due 139.22

Continue the Credit Card/Electronic Check Payment Process

Please Note: Credit card payments cannot be processed when using the iPermits Online payment service does not accept American Express credit cards.

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

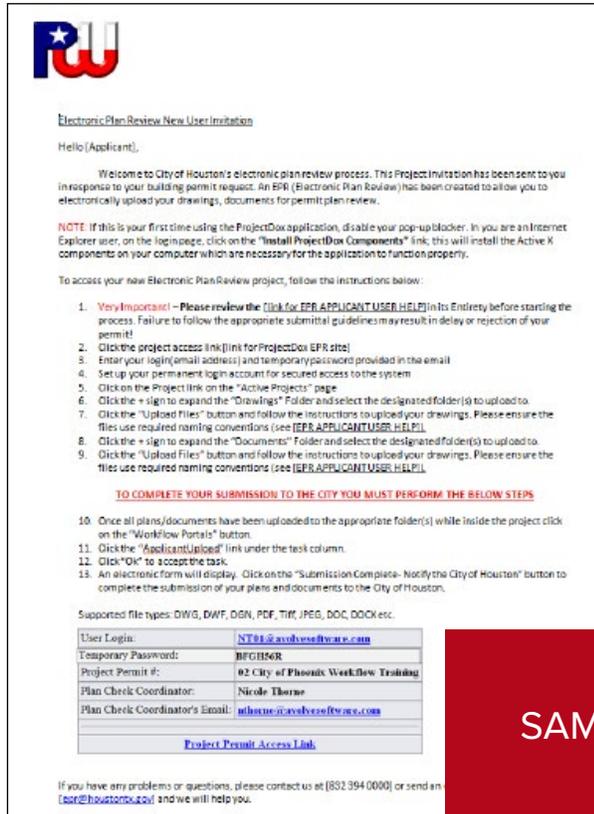
When making payment with credit card or electronic check you will be transferred to the Chase® Bank website.



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 "Applicant/Issues" 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, TIF, JPEG, DOC, DOCX etc.

User Login:	NTB12@avalara.com
Temporary Password:	MFCH56R
Project Permit #:	02 City of Phoenix Workflow Training
Plan Check Coordinator:	Nicole Thorne
Plan Check Coordinator's Email:	nthorne@avalara.com

[Project Permit Access Link](#)

If you have any problems or questions, please contact us at (832.994.0000) or send an email to nsr@houston.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

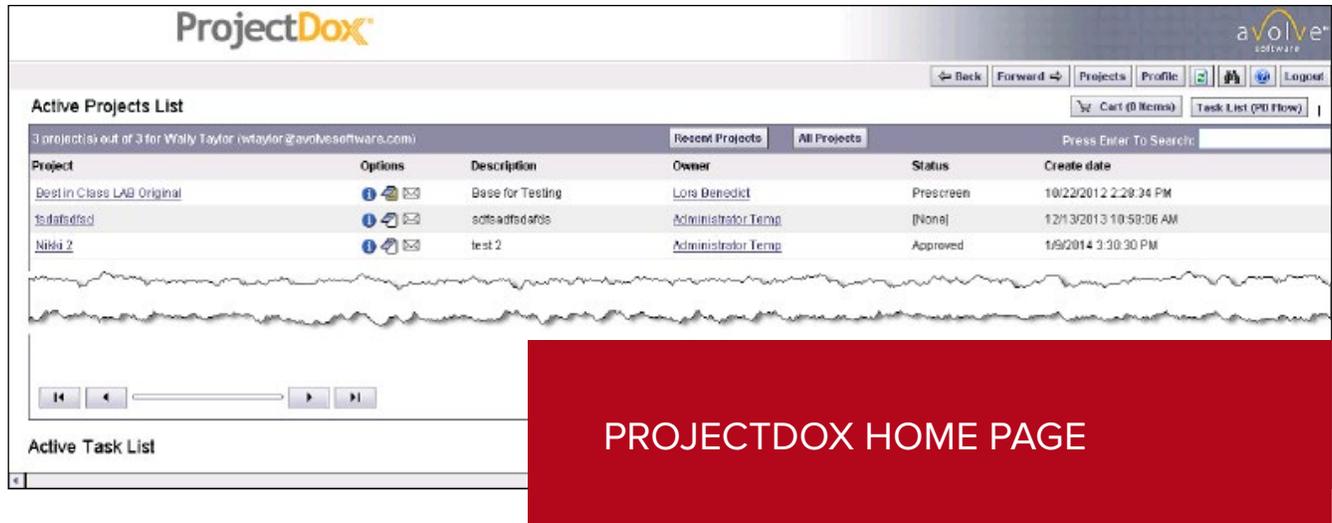
- Reset your password
- Create a security question and answer
- Enter some additional information about yourself.

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



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.

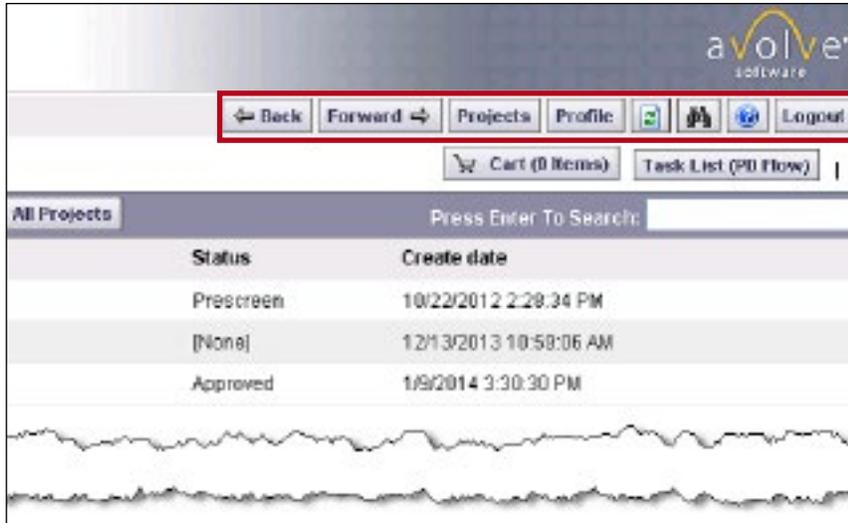
If you ever forget your password, click on the **Forgot Your Password?** link next to the “Login” button. The use of the “Forgot Your Password?” link requires that the user has logged in at least once and no longer has a temporary password associated to their account.



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.

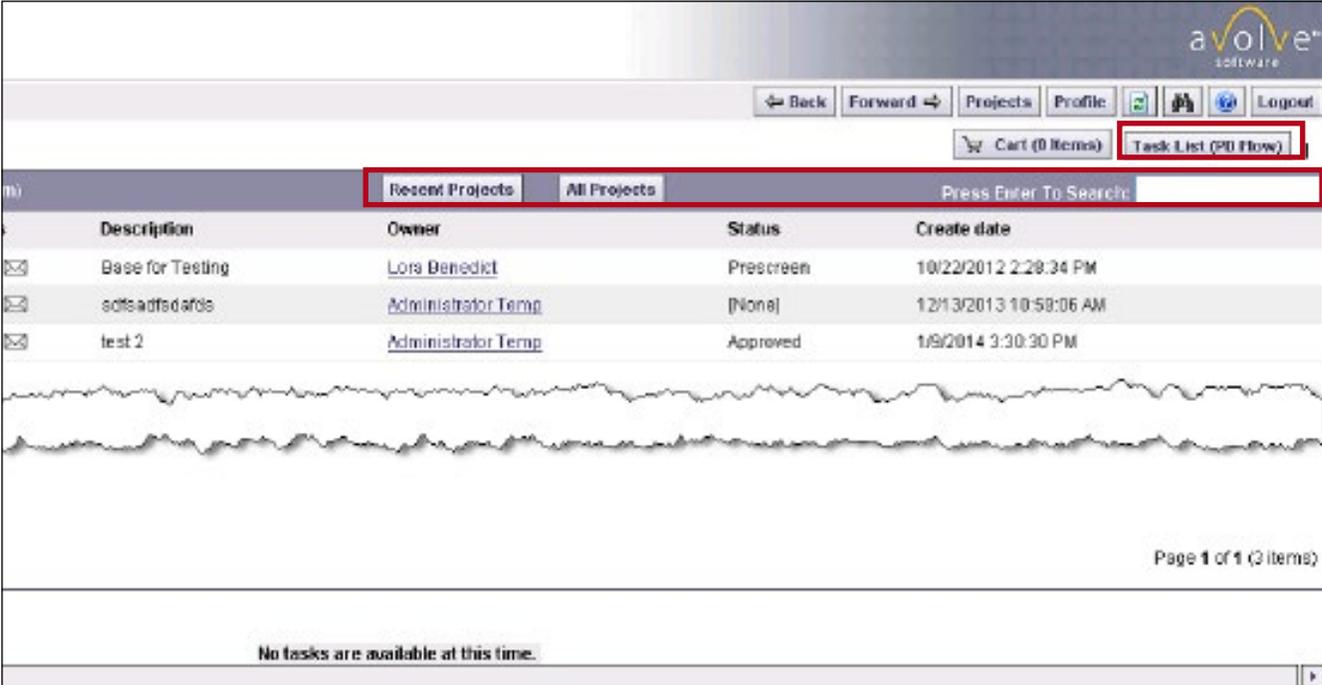
Going from left to right the buttons are:

- 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 screenshot shows the avolve software interface. At the top right, the logo for 'avolve software' is visible. Below the logo is a navigation bar with buttons for 'Back', 'Forward', 'Projects', 'Profile', and 'Logout'. A search bar is located below the navigation bar, with a 'Task List (PD Flow)' button highlighted in a red box. Below the search bar, there are two tabs: 'Recent Projects' and 'All Projects', both highlighted in a red box. The main content area displays a table with the following columns: 'Description', 'Owner', 'Status', and 'Create date'. The table contains three rows of data:

Description	Owner	Status	Create date
Base for Testing	Lora Benedict	Prescreen	10/22/2012 2:28:34 PM
sotssadfsdafs	Administrator Temp	[None]	12/13/2013 10:58:06 AM
test 2	Administrator Temp	Approved	1/9/2014 3:30:30 PM

At the bottom right of the table, it says 'Page 1 of 1 (3 items)'. Below the table, there is a message: 'No tasks are available at this time.'

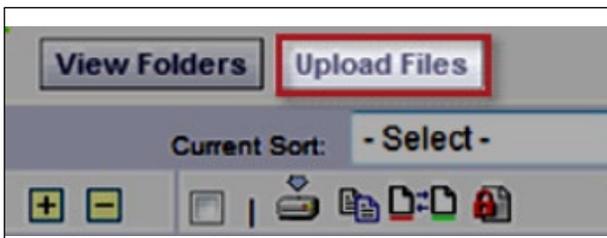
The Project List and the Task List are set to display a limited number of entries at a time. Use these buttons  to move to the previous, next, first, or last page.

Uploading Your Files

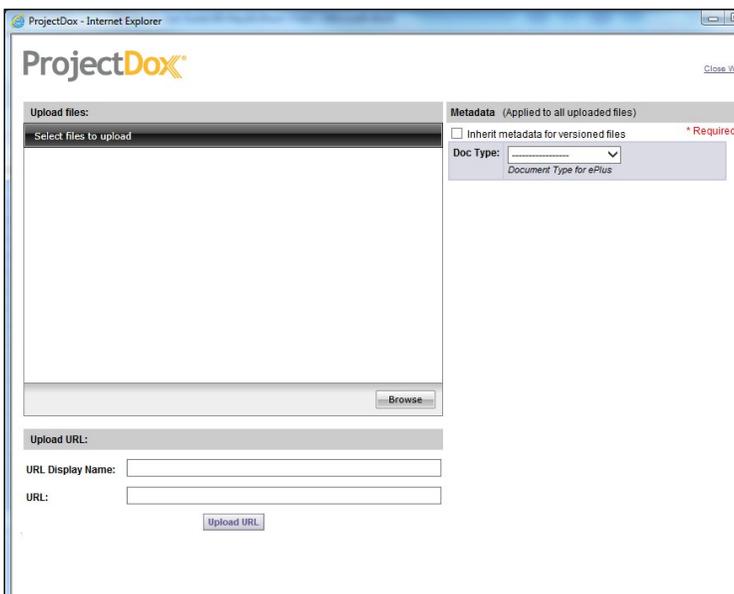
STEP BY STEP

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

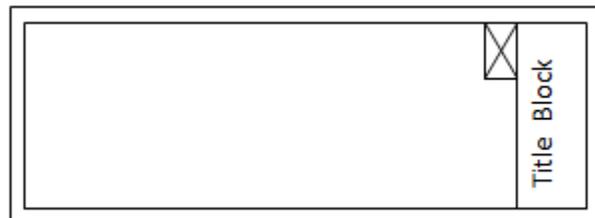
1. A fully completed commercial application for plan review
2. Prerequisite check list must be included with the application

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

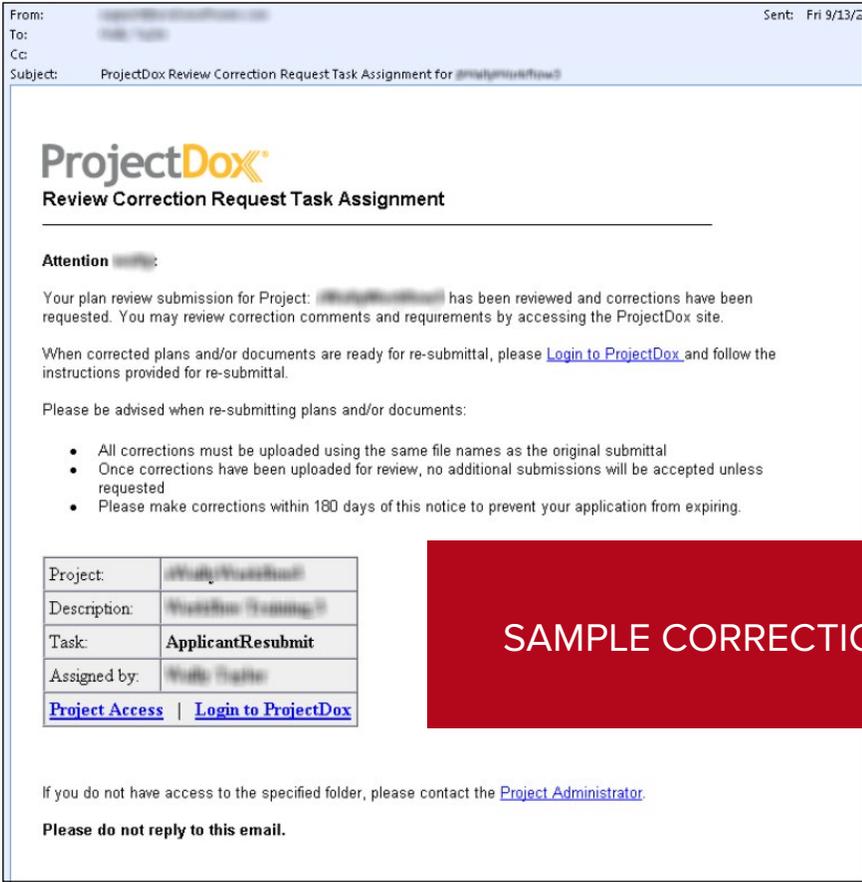
PRE-SCREEN REVIEW PROCESS

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.



The screenshot shows an email interface with a header containing 'From:', 'To:', 'Cc:', and 'Subject: ProjectDox Review Correction Request Task Assignment for [redacted]'. The main body of the email features the ProjectDox logo and the title 'Review Correction Request Task Assignment'. Below this, there is a section for 'Attention [redacted]:' followed by text explaining that a plan review submission has been reviewed and corrections are needed. It provides instructions on how to access the ProjectDox site for more details and a link to 'Login to ProjectDox'. A list of instructions for re-submission is provided, including requirements for file names, submission frequency, and a 180-day deadline. A table with project details is included, and there are links for 'Project Access' and 'Login to ProjectDox'. At the bottom, there is a note about contacting the Project Administrator if access is an issue and a request not to reply to the email.

Project:	[redacted]
Description:	Weather Training?
Task:	ApplicantResubmit
Assigned by:	Wally Taylor

[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.

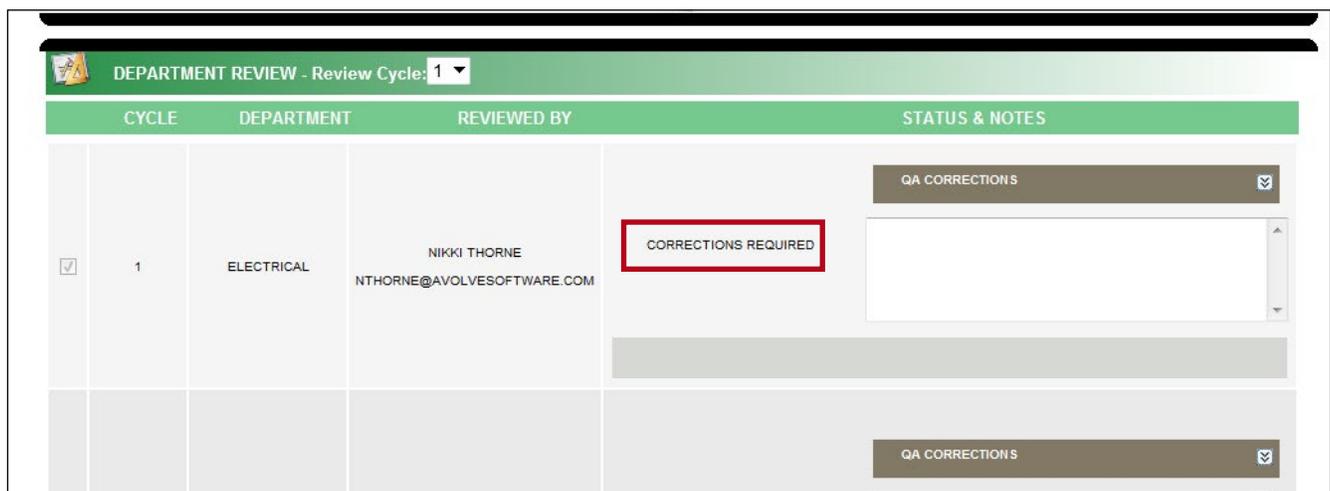
If all reviews have been approved, Review QA Coordinator applies the final City of Houston approval stamp and you will be notified for the final payment. You will receive an **Approval – Pending Payment** email with the instructions.



The screenshot shows a web interface for 'DEPARTMENT REVIEW - Review Cycle: 1'. It features a table with columns: CYCLE, DEPARTMENT, REVIEWED BY, and STATUS & NOTES. The first row shows cycle 1, department ELECTRICAL, reviewed by NIKKI THORNE (NTHORNE@AVOLVESOFTWARE.COM). The status is 'APPROVED', which is highlighted with a red box. To the right of the table is a 'QA CORRECTIONS' section with a text area. Below the table are two buttons: 'No Reviewer Corrections Required' and 'Assign Reviewer Correction'.

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
1	ELECTRICAL	NIKKI THORNE NTHORNE@AVOLVESOFTWARE.COM	APPROVED

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.



The screenshot shows the same web interface as above, but the status is 'CORRECTIONS REQUIRED', highlighted with a red box. A checkmark is visible in the first column of the table. The 'QA CORRECTIONS' section on the right is expanded, showing a text area with a scroll bar.

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	ELECTRICAL	NIKKI THORNE NTHORNE@AVOLVESOFTWARE.COM

Review of Plans

UPLOADING CORRECTIONS

CHANGEMARKS - Review Cycle: 1

Filter Changemarks by Keyword: [SEARCH](#)

[Click Here to Load Changemarks...](#)

[Click Here to Publish Changemarks to PDF...](#)

Resolved	Status	File	Cycle	Department	File	Markup	Description	Details
Yes No	No		1	Electrical	electrical plan.pdf	ELE 01	Electrical Issue 456.007	Issue is described here in d

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.

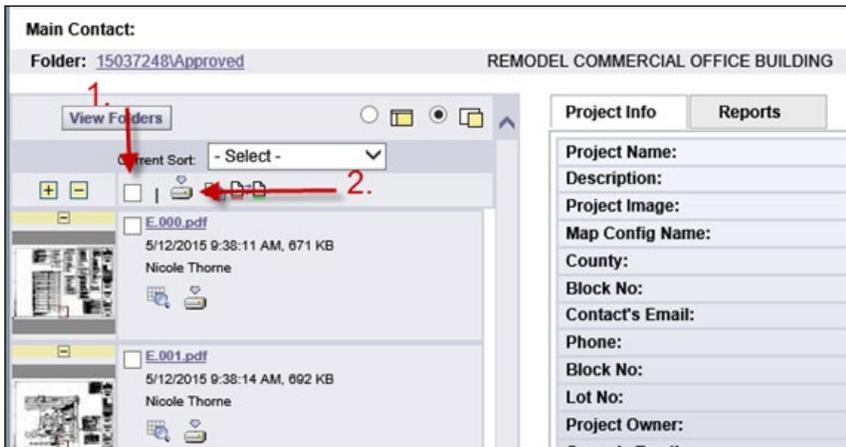
An email notification will be sent to the Review Coordinator assigning them to the step **Resubmit Received**. The Review Coordinator will confirm that plans have been uploaded and the proper departments are selected for assignment for the next review cycle.

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

Print

APPROVED PLAN SET

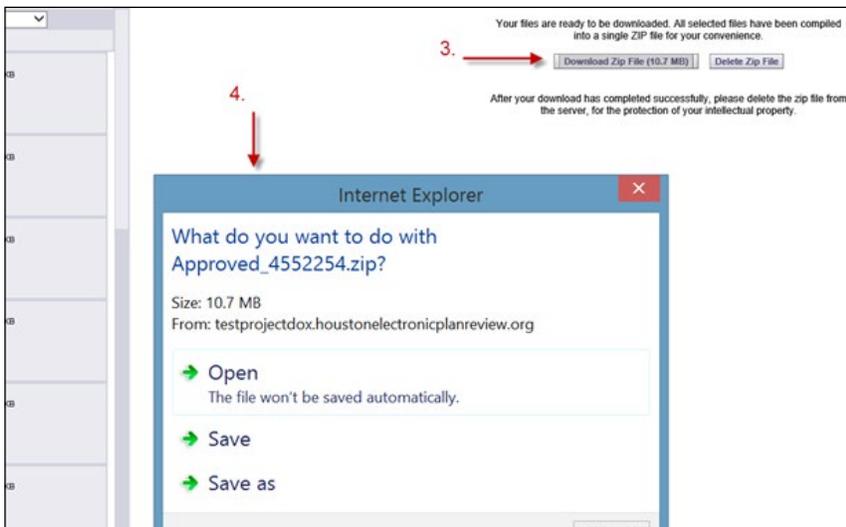
After final payment is made, you will receive an email indicating that your application has been paid in full and that you may access your approved drawings and documents in the ProjectDox folder marked **Approved**.



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.hpcservices.org.



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