HOUSTON
PUBLIC WORKS
Houston Permitting Center

Commercial Building Plan Review

Step-by-step user guide to the electronic plan review

ELECTRONIC PLAN REVIEW!

Table of Contents

Revisions to User Guide
VERSION 7.0

Revisions to this version of the user guide include:

- Process of editing sales order.
- Clarification on file names & size.
- Screen shots were updated.
- Clarification on where to upload plans on ProjectDox®.

| Version	Published Date
1.0	6/2015
2.0	8/2015
3.0	11/2015
4.0	7/2019
5.0	10/2019
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7.0	1/2020

Overview
ELECTRONIC PLAN REVIEW

This document will guide first-time users through the electronic plan review (EPR) process for **_commercial_** buildings. Two online systems are used to complete the steps in the EPR process: iPermits and ProjectDox®.

The iPermits portal is used for the completion of permit applications, address verifications, and payments. The ProjectDox® system is used to upload plans, receive and respond to comments, and download of approved plans.

ELECTRONIC PLAN REVIEW PROCESS

Step 1: Log into iPermits account

Step 2: Complete building permit application

Step 3: Validate address (new construction only)

Step 4: Finalize permit application

Step 5: Pay plan review deposit fee (25% of building permit)

Receive email invitation

Step 6: Log into ProjectDox account

Step 7: Upload files

Step 8: Complete assigned task

Corrections required?

No

Step 10: Download approved plan set

Yes

Step 9: Review comments and correct files

Go back to Step 6

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 the iPermits Portal 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: USERNAME AND PROFILE	You will receive a confirmation email with instructions.

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

Application Process
COMMERCIAL BUILDING PERMIT APPLICATION

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

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

A list of existing building permit applications will display with their status in red. Click on an application number to continue the process.

Application Process
COMMERCIAL BUILDING PERMIT APPLICATION

Public Works and Engineering >Planning and Development Services Division   Cont

Building Applications

Click the button to Toggle the dropdown menus.

Commercial Applications

Electronic Locks
Fire Alarm
Sprinkler
Underground Fire Line Plan Check
New/Remodel Commercial Building Permit Application
Site Work Permit Application
Plan Revision Application for an Existing ILMS Project
Deferred Submittal Application for an Existing ILMS Project

Select the **New/Remodel Commercial Building Permit Application** button.

The City of Houston
Official Site for Houston, Texas

Home | I Want To | Government | Residents | Business | Departments

Public Works and Engineering >Planning and Development Services Division

Commercial Building Project Application - Address Search

ADDRESS SEARCH OR ASSIGNMENT

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.

For address related assistance please email Permit_office@houstontx.gov or call 832.394.8899 . During the application process you will also be offered the opportunity to submit the application.

Note:

Do not enter street directions, (e.g., N., S., W., etc.)
Do not enter street types (e.g., Rd., Dr., etc)

Street No: 1002   Street Name: Washington

Search for Address

Complete the street number, abbreviated as **Street No**, and **Street Name** fields. Then click the **Search for Address** button.

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

⚠️

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
COMMERCIAL BUILDING PERMIT APPLICATION

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.

From the generated list, click on the correct street number to continue.

If a suite, floor, or building number is not listed, click on the address that most closely matches.

If the street number is not listed, click on the button **The needed property address is not listed** and contact the Permits Section for assistance.

Application Process
COMMERCIAL BUILDING PERMIT APPLICATION

Enter the required information on Page 1. Once complete, click the **Save & Continue** button located at the bottom of the page.

The indicated Occupant and Project Address fields may be pre-populated. Review and edit as needed.

The fields indicated in grey are only required for new construction.

Project scopes identified as new construction trigger an automatic address verification.

Application Process
COMMERCIAL BUILDING PERMIT APPLICATION

Enter the required information on Page 2. Once complete, click the **Save & Continue** button located at the bottom of the page.

Select the appropriate information from the drop down boxes. (If new construction FCC code is required.)

Enter added square footage (if applicable) and the cost of improvement.

A TDLR number is required for commercial projects over $50,000.

If known, enter contact information for the Project Manager and General Contractor. Otherwise, select option yet to be determined.

Application Process
COMMERCIAL BUILDING PERMIT APPLICATION

Upload all required documents <u>in support of</u> the building permit application:

- Deed restrictions declaration form
- Prerequisite checklist
- Documents relating to address verification

<u>DO NOT UPLOAD BUILDING PLANS HERE.</u>

<u>Plans will be uploaded in ProjectDox®.</u>

Choose up to three files and select the **Begin Upload** button. Attached files are displayed at the top of the page.

Click the **Copy this Application** button to create sub-project application(s). This option must be clicked prior to finalizing the application.

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

Twenty-five percent (25%) of the permit fee is due upon submitting an application.

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If address verification is required, the *Finalize Application* button will not be visible. Once approval is granted, the applicant will be notified via email to proceed with finalization.

Plan Review Deposit Fee

CREDIT CARD OR E-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.

If application needs to be updated, select sales order number and click **"Delete This Sales Order."**

Processed payments are indicated by a project number in red.

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

You will be transferred to the Chase® PayConnexion website to complete the transaction. **A receipt will be emailed to you from Chase.** You may need to check your spam or junk folder.

Note: Chase® PayConnexion will assess a convenience fee for their service. PayConnexion *does not* accept American Express credit cards.

Plan Review Deposit Fee
ADVANCED PAYMENT ACCOUNT

If an Advanced Pay Account (APA) has been established, this payment option will be included on your Shopping Cart Maintenance screen.

Check the box of permit(s) to be paid, then click the **Charge This to My APA Account** button.

Select the appropriate account number associated with your iPermits user profile. Then click on the **Submit APA Payment** button to complete the transaction.

Don't want to pay for the fees? A third-party can import a shopping cart number to their iPermits user account and complete the sales transaction.

ProjectDox® Set Up
NEW USER ACCOUNT

Invitation to Join City of Houston
Electronic Plan Review System

Dear
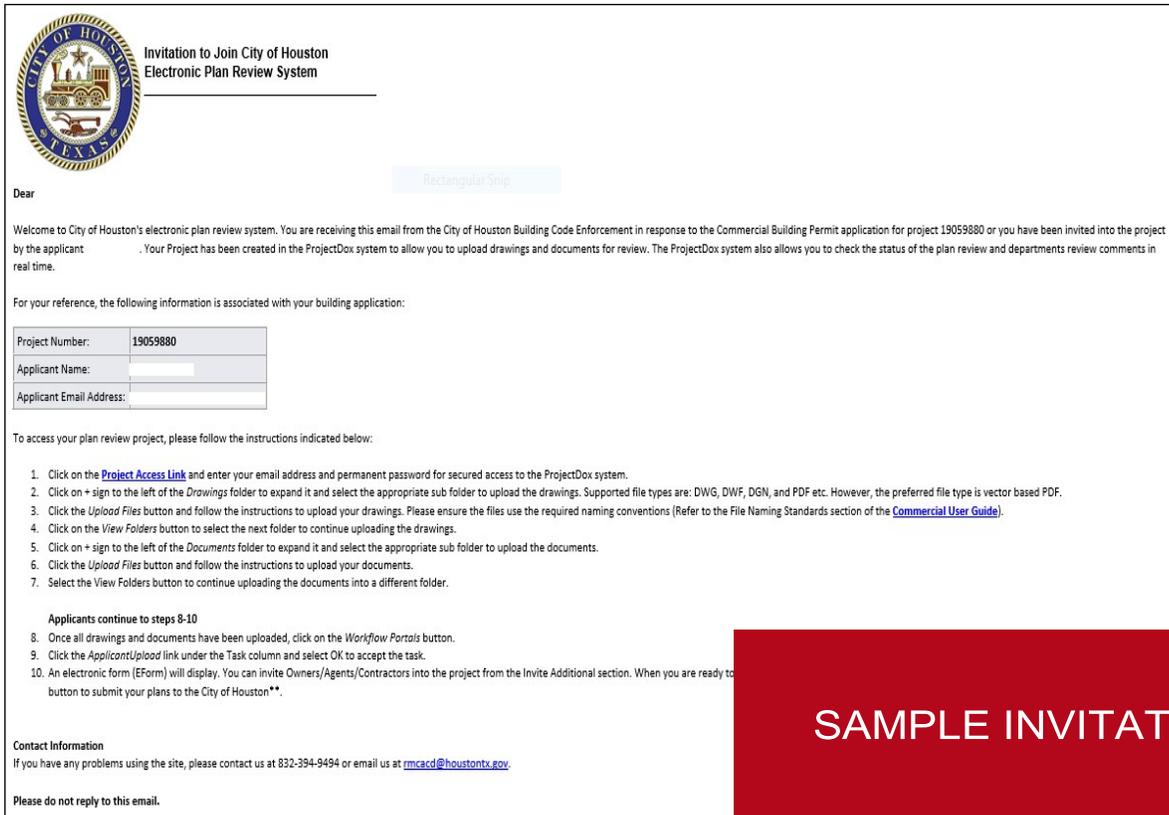
Welcome to City of Houston's electronic plan review system. You are receiving this email from the City of Houston Building Code Enforcement in response to the Commercial Building Permit application for project 19059880 or you have been invited into the project by the applicant   . Your Project has been created in the ProjectDox system to allow you to upload drawings and documents for review. The ProjectDox system also allows you to check the status of the plan review and departments review comments in real time.

For your reference, the following information is associated with your building application:

Project Number:	19059880
Applicant Name:	
Applicant Email Address:	

To access your plan review project, please follow the instructions indicated below:

1. Click on the **Project Access Link** and enter your email address and permanent password for secured access to the ProjectDox system.
2. Click on + sign to the left of the *Drawings* folder to expand it and select the appropriate sub folder to upload the drawings. Supported file types are: DWG, DWF, DGN, and PDF etc. However, the preferred file type is vector based PDF.
3. Click the *Upload Files* button and follow the instructions to upload your drawings. Please ensure the files use the required naming conventions (Refer to the File Naming Standards section of the **Commercial User Guide**).
4. Click on the *View Folders* button to select the next folder to continue uploading the drawings.
5. Click on + sign to the left of the *Documents* folder to expand it and select the appropriate sub folder to upload the documents.
6. Click the *Upload Files* button and follow the instructions to upload your documents.
7. Select the View Folders button to continue uploading the documents into a different folder.

Applicants continue to steps 8-10
8. Once all drawings and documents have been uploaded, click on the *Workflow Portals* button.
9. Click the *ApplicantUpload* link under the Task column and select OK to accept the task.
10. An electronic form (EForm) will display. You can invite Owners/Agents/Contractors into the project from the Invite Additional section. When you are ready to button to submit your plans to the City of Houston**.

Contact Information
If you have any problems using the site, please contact us at 832-394-9494 or email us at rmcacd@houstontx.gov.

Please do not reply to this email.

SAMPLE INVITATION

Once the plan review deposit has been paid, an invitation *(see above)* will be sent to the applicant to upload plans into ProjectDox®.
For new users, the invitation will contain a temporary password. Subsequent invitations will not contain a password.

First-time users should note:
- ProjectDox® uses pop-up windows. Configure your browser's pop-up blocker to allow for pop-ups for the ProjectDox® site. If you login but no ProjectDox® window appears, a pop-up blocker is likely still installed.

- Click on the **Install ProjectDox® Components** link on the login page for easy downloading and installation of ActiveX controls *(required for Internet Explorer users only)*.
- The login page also has a link for adding a desktop shortcut to the ProjectDox® site, and a link for adding it to your favorites.

Depending upon your organization's security settings, a network administrator or IT department may need to complete the steps required for system set up.

ProjectDox® Set Up
NEW USER ACCOUNT

From the invitation, click on the **Login to ProjectDox®** link or **Project Access** link to open the login page using your default web browser. You can also type or paste the ProjectDox® URL into another web browser.

Enter your email address and temporary password and click the **Login** button. *(The password is case sensitive.)*

You will be taken to your User Profile, where you must complete the required yellow fields:

- Change your password
- Create a security question and answer
- Contact information

Click the **Save** button to continue onto the home page.


Logging into ProjectDox® a second time (and every time after that), you will use the password that you entered in your Profile page.

If you ever forget your password, click on the **Forgot Your Password?** link. You will be prompted with your security question.

Note: This feature requires that the user has logged in at least once and no longer has a temporary password.

Navigation Basics
HOME PAGE LAYOUT

SAMPLE HOME PAGE

The ProjectDox® home page is divided into two main sections. The upper section is your **Active Projects List**, which displays basic information about every project you have been invited into as a main applicant and as a project member.

By default, the 15 most recently accessed projects are listed, with the most recent at the top. Select the **All Projects** button to view a list of all of your projects.

The Active Projects List can be sorted by clicking on the header of the column. You can

search for words contained in these columns through the **Press Enter to Search** field.

The lower section of the home page is your **ProjectFlow Task List**, which displays all your outstanding tasks on projects for which you are the main applicant. The Active Task List can be sorted by clicking on the column header.

Both the Active Projects List and Active Task List are set to display a limited number of entries at a time. Use these buttons

to move to the first, previous, next, or last page in the list.

ProjectDox can be used in multiple browsers, including Chrome, Safari, FireFox, Microsoft Edge and Internet Explorer. It can be used on Windows or Mac devices. However, ProjectDox behaves differently with each browser and works best with Internet Explorer.

Navigation Basics
HOME PAGE TOOLBAR

Your primary navigation buttons are located in the upper right corner of the home page.

- The **Back** and **Forward** buttons function much like the back and forward buttons in a web browser, taking you to the screen you previously or subsequently viewed.

- The **Projects** button will take you back to the home page.

- 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®.

- The **Task List** button shows any tasks requiring action from you for all projects in a separate window.

Standards

FILE TYPES AND BORDERS

Prior to upload, ensure that all files comply with the following standards. Failure to meet the City's standards may delay your review.

REQUIRED FILES
- A fully completed commercial application for plan review
- Pre-requisite check list must be included with the application

FILE TYPE STANDARDS
- DOC, DOCX, and PDF files are accepted for calculations, reports, and other supporting documentation (i.e. non-drawing files)
- Flat Files recommended (no layer). Vector PDF and JPEG 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) for the approval stamp.
- The City of Houston requires that plans be uploaded in an approved format, to scale, with a _minimum_ 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 changemark. Changemarks are created to quickly identify a markup and associated comments.

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Drawings should be uploaded in landscape mode.

Standards
FILE NAMING CONVENTIONS

All file names are limited to 70 characters.

File names for _drawings_ 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 a decimal after the 3rd digit, for example: S.001.99.

Corrected files should always be resubmitted with the SAME FILE NAME as the original submittal. **Also, all <u>CAPS</u> on naming files.**

Note: If this 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
Index	I	001-999	1.000 SHEET INDEX
General	G	001-999	G.001 GENERAL NOTES
Demo	D	001-999	D.002 DEMOLITION FLOOR PLANS
Architectural	A	001-999	A.003 SITE PLAN & DETAILS
Landscape	L	001-999	L. 004 IRRIGATION DETAILS
Structural	S	001-999	S.005 FOUNDATION PLANS
Electrical	E	001-999	E.006 FIRST FLOOR POWER PLAN
Plumbing	P	001-999	P.007 LEGEND SCHEDULE & NOTES
HVAC	M	001-999	M.008 LEVEL I HVAC PLAN
Civil	C	001-999	C.009 SWPP PLAN
Health Equipment	K	001-999	K.010 ROOM FINISHES
Electric Locks	EL	001-999	EL.001 PERMIT DRAWINGS
Fire Marshal			
Haz-Mat	HZ	001-999	HZ.001 HAZ-MAT PLANS
High-Pipe	HP	001-999	HP.004 HIGH PILED STORAGE
Standpipes	FP	001-999	FP.005 STANDPIPE
Alarms	FA	001-999	FA.006 SPEC SHEET
Fire Suppression	FS	001-999	
Sprinklers	FS	001-999	FS.001 SPRINKLER EVALUATION
Underground Fire Lines	UL	001-999	FS.001 FIRE LINES

Standards
FOLDER STRUCTURE

Files are securely managed through a pre-defined folder structure, which is listed below. Users cannot rename or add folders to the structure.

All drawings should be uploaded as single-page files into the **Drawings** folder for each project.
(ex: 20 electrical pages = 20 files in the electrical drawings sub-folder).
All documents (any non-drawing files, geotechnical reports, etc.) should be uploaded as multi- page files into the **Documents** folder.

1. **DRAWINGS**
   - Index
   - General
   - Demo
   - Architectural
   - Landscape
   - Structural
   - Electrical
   - Plumbing
   - HVAC
   - Civil
     - Storm Drainage
     - Mitigation, *if applicable*
     - Water Wastewater
   - Health Equipment (Food Consumption)
   - Electric Locks
   - Fire Marshal
     - Haz-Mat
     - High Pile
     - Standpipes
     - Alarm
     - LP Gas - Natural Gas (tanks, generators, etc.)
   - Fire Suppression
     - Sprinklers
     - Underground Fire Lines

2. **DOCUMENTS**
   - Application
   - Pre Requisite Check List
   - Utility Letter(s)
   - Energy Forms (codes)
   - 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**

File Upload
FIRST SUBMISSION

To access a project's main page, select the appropriate link under the **Project** column on the Active Projects List or Active Task List.

Click the "+" icon to view any subfolders and click the "-" icon to hide subfolders.

Click on the name of the folder you want to upload into. On the next screen select the **Upload Files** button.

A pop-up window will appear.

File Upload
FIRST SUBMISSION
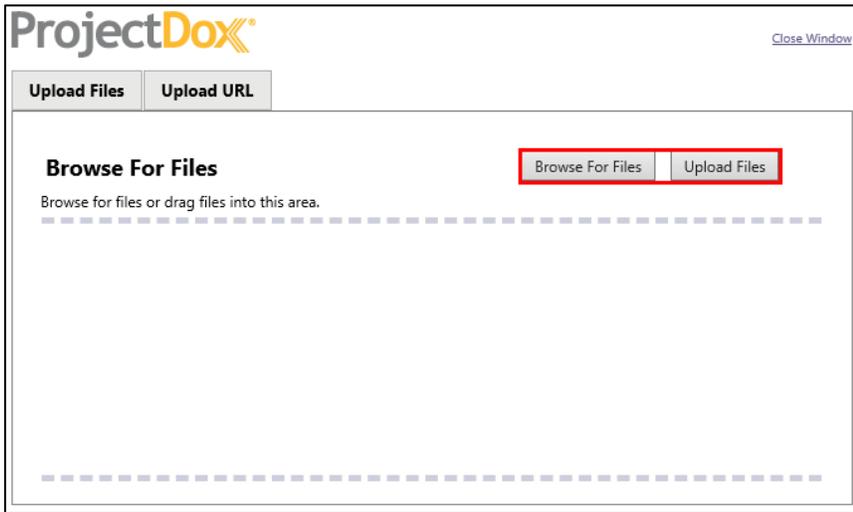
By default, up to 200 files or 10GB, whichever comes first. By default, up to 200 files can be uploaded at the same time.

1. Select **Browse For Files** and navigate to the file.

2. Select the file and click Open.

3. Once all files have been selected, click the **Upload Files** button.

File Upload
FIRST SUBMISSION

Once files are uploaded into a folder, thumbnail images of the files will be visible. Next to each thumbnail is the filename, upload date and time, file size, and name of the user who uploaded that file.

If a file is uploaded into the wrong folder, select the red "X" icon next to the thumbnail image to delete a single file. To delete _all_ files in a folder, check the box at the top of the list and then click on delete icon to the right of the box.

The ability to delete files is permitted on the first submission only. Individuals invited into a project will not have this ability and should contact the main applicant to delete files.

To upload files into another folder, click on the **View Folders** button to return to the project's main page. Repeat the process until all drawings and documents are uploaded into their respective folders.

The thumbnail images do not need to finish processing before uploading files into another folder.

Completing the Submittal
APPLICANT UPLOAD

ProjectDox® moves a project through a series of tasks called a workflow. Some of these tasks are attached to the applicant and others to City staff.

The completion of one task signals ProjectDox® to assign the next task in the

workflow. Reminder notifications of an open (i.e. incomplete) task are sent via email at designated intervals.

To notify the City of Houston that your plans are ready for pre-screen, the applicant must complete the **ApplicantUpload** task.
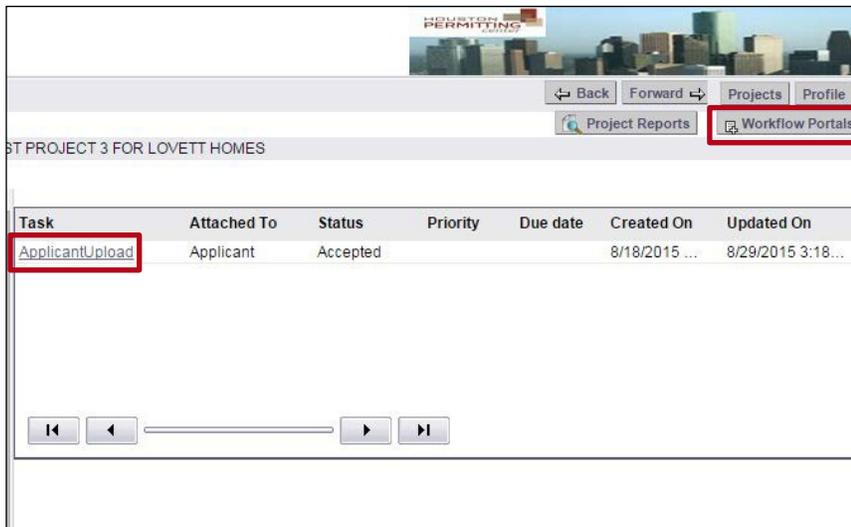
From the project's main page, click on the **Workflow Portals** button to display the assigned task.

Click on the **Applicant Upload** task link, and then click OK to accept the task.

The eForm will pop-up in a separate window.
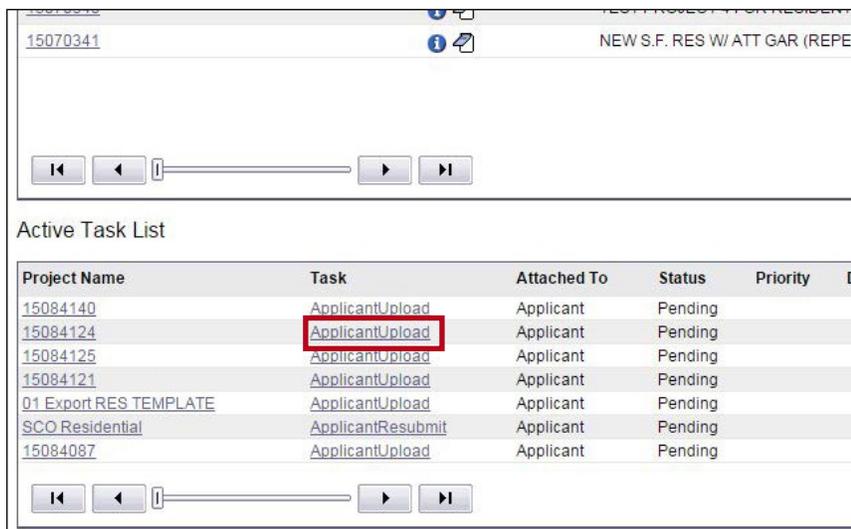
Alternatively, tasks can be accessed via the **Active Task List** on the homepage.

Under the **Task** column, select the link for the corresponding project.

The eForm will pop-up in a new window.

Completing the Submittal
APPLICANT UPLOAD

Through the eForm, the main applicant can invite individuals into the project. Enter the individual's name and email address and then click on the **Invite** link. An email will be sent to the user to create an account.

Invited users will have the ability to upload and view files, but cannot complete a task *(i.e. no access to the eForm)*. Invited project members will also receive the same email notifications that the main applicant receives as the project moves through the workflow.

Click on the **Save & Close** button to complete the task at a later time.

Click on the **Submission Complete** button to move your project to the prescreen review step. Once clicked, all access to upload files is removed. Your project status will now update from *First Submission Pending* to *Prescreen Review*.

Pre-Screen Review
PROCESS OVERVIEW

During the pre-screen review, a permit tech will review the uploaded files for completeness and compliance with the standards.

If you have met the submittal requirements, you will receive a **Prescreen Approved** email and your submittal is ready for the formal review process. The City's Review Coordinator (RC) group will assigns the formal review to all required disciplines and departments.

If items are missing or corrections are required, a **Corrections Complete** task notification will be emailed to you with instructions on how to resubmit to fix the issues.

The permit tech can provide information about the submittal issues or add comments to the check list and can also attach supporting documents for you to review.

SAMPLE CORRECTIONS EMAIL

Pre-Screen Review
CORRECTION COMPLETE TASK

The following steps outline how to review the comments, submit corrections, and complete the assigned **Correction Complete** task:

1. Log into ProjectDox®.

2. Select the **Correction Complete** task link for the appropriate project from the *Active Task List* on the home page or from within the project.

3. Select **OK** to accept responsibility for completing the task.

4. The eForm will pop-up in a new window. Comments may be found in the following sections of the eForm:

- Text box

- Intake Checklist and the items in the checklist by selecting either the **View Intake Checklist** link or the **Checklist Report** tab.

5. Upload files as needed to the appropriate folder(s). Revised files must be uploaded using the same name as the original file to allow for automated file versioning.

6. Select the check box to indicate corrected items have been uploaded. This action enables the **Complete Submission** button. You can also add notes to the permit tech in the eForm.

7. Select the **Complete Submission** button

8. Select **OK** to the dialog message, *Completing this task will finish your participation in this step and cannot be undone. Continue?* (Select **Cancel** to return to the eForm)

The **Correction Complete** task is now complete and your project status will change from *Prescreen Resubmit* to *Prescreen Review*.

Email notification is sent to the permit tech to perform the prescreen review again. If no additional information is required, the permit tech approves the prescreen review and your project will move onto the formal review. If more corrections are required, the *Correction Complete* task will repeat.

Review of Plans
PROCESS OVERVIEW

The City's Review Coordinator (RC) group assigns the formal review to all required disciplines and departments. Each assigned department may approve or reject their review, and may add a status, check list comments, free form comment and/or changemark to the drawings.

Once all assigned departments have completed their review, the RC notifies the applicant 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 the applicant will receive an **Approved** email with instructions.

If at least one reviewer has selected "Rejected", the applicant will receive an email notification of the **ApplicantResubmit** task with instructions on how to resubmit to fix the issues.

Applicants may track their progress in the review through the reports tab.

Workflow Instance [19086824 - Pflow COM Template - 7/20/2019 9:57:36 AM ▾]   [View Report]

Department Review Status Report	
Project Name:	19086824
Workflow Started:	07/20/2019 9:57 AM
Report Generated:	07/20/2019 10:59 AM

Department Review Status Report

Project Name:	19086824
Workflow Started:	07/20/2019 9:57 AM
Report Generated:	07/20/2019 11:11 AM

Cycle	Department	Reviewer	Email	Status
	Structural (330)			No Review
⊟ 1	Oversight	Review Name	email@houstontx.gov	No Review
	Structural (330)			No Review
⊟ 2	Oversight	Review Name	email@houstontx.gov	No Review
⊟ 3	Structural (330)			Rejected

Review of Plans
APPLICANT RESUBMIT TASK

The following steps outline how to review the comments, submit corrections, and complete the assigned ApplicantResubmit task:

1. Log into ProjectDox®.

2. Select the **Applicant Resubmit** task link from the *Active Task List* on the home page or from within the project.

3. A dialog box displays, *Do you want to accept this task?*. Select **OK** to accept responsibility for completing the task.

4. The eForm will pop-up in a new window. Comments may be found in three sections of the eForm:
   - Comments provided by the plan reviewers and responses as required.
   - Checklist Items on the Checklist tab
   - Markups provided in the Changemark Section

5. Upload files as needed to the appropriate folder(s). <u>Revised files must be uploaded using the same name as the original file</u> to allow for automated file versioning.

6. Provide responses to comments.

7. In the *Task Instructions* section of the eForm, select the check boxes to indicate the items have been completed. Selection of <u>all 3</u> boxes enables the **Review Complete** button.

8. 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.

Download Plans

APPROVED PLAN SET

After all departments have approved their review, 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. An email will be sent indicating the files are available for download in the **Approved** folder. It will also include the remaining balance due prior to starting construction.
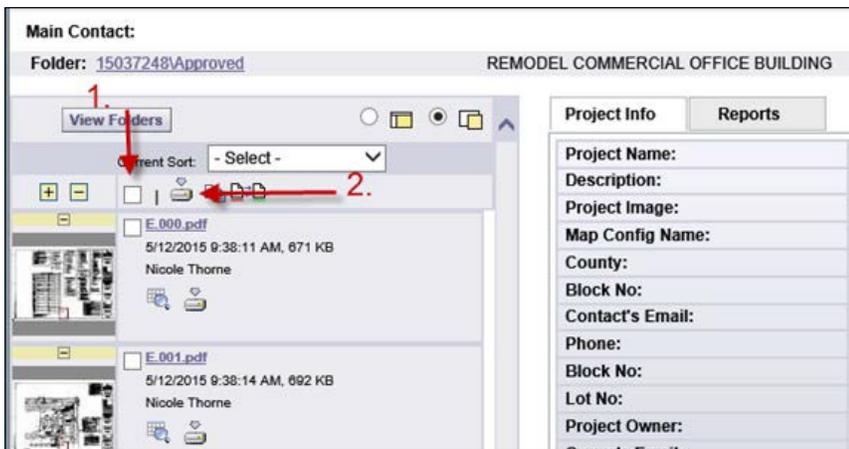
To download the entire folder, select the box at the top of the thumbnails.

Uncheck any pages that you do not want to download.

When your selection is complete, click on the download icon.
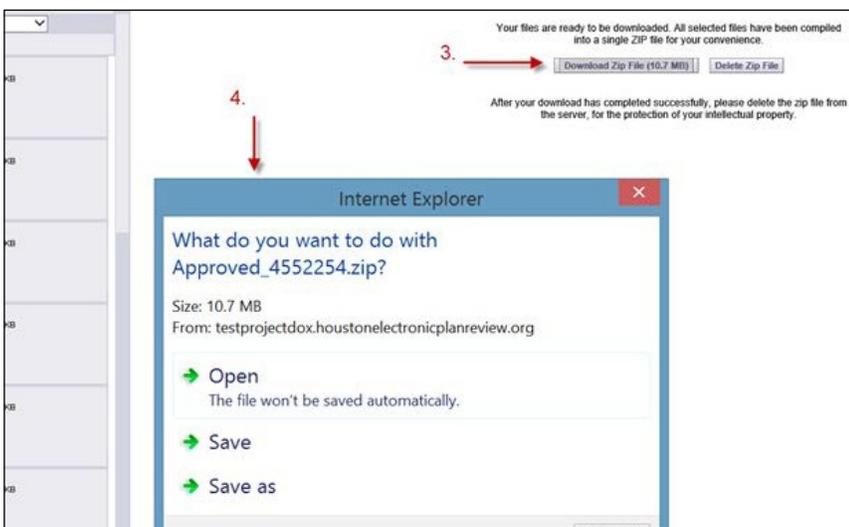
A single zip file will be created of the selected pages.

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.

Plan Review Revision

APPLICATION PROCESS

The process of setting up a revision is similar to setting up a new project on the iPermits Portal.

Logon to iPermits and click on **Building Permit Applications**.
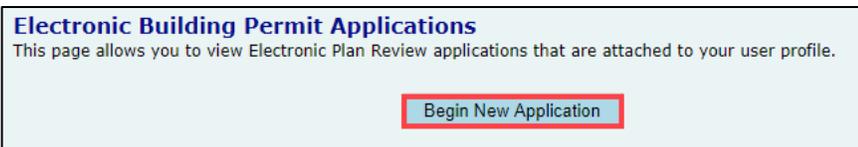
On the next screen click on **Begin New Application**.
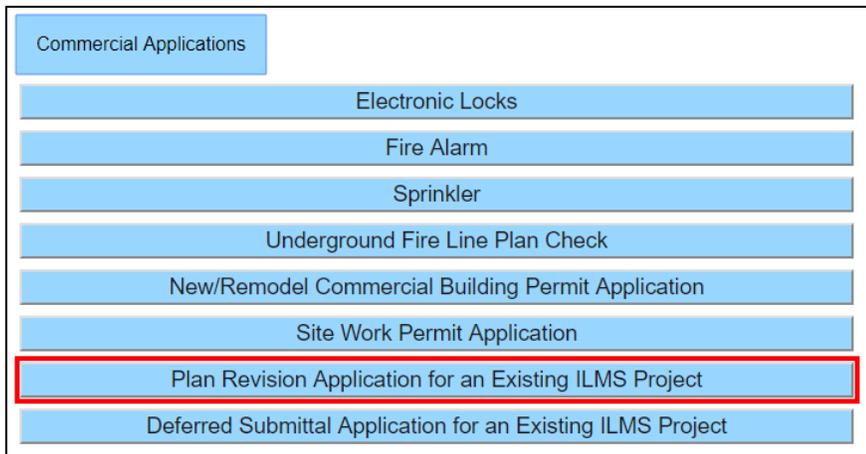
Click on **Commercial Applications**. From the list of available applications, please select the **"Plan Revision Application for an Existing ILMS Project"**.
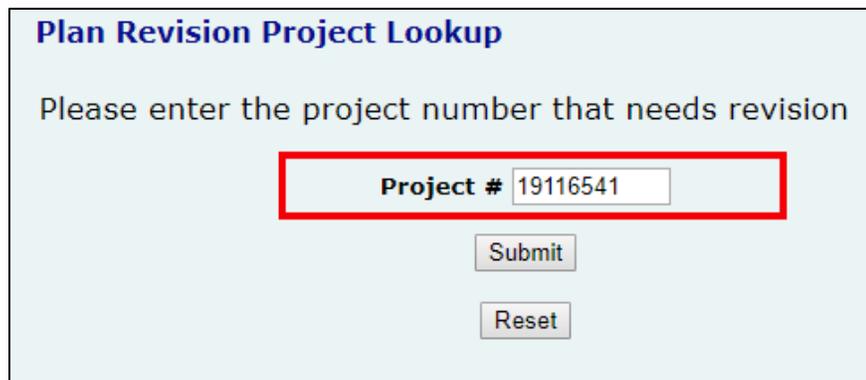
Enter the project number of the plans you wish to submit for a revision.

Plan Review Revision
APPLICATION PROCESS

Plan Revision Project Verification

Please review and confirm this is the project requiring revision

Project Number: **19116541**

Address: 911 WASHINGTON AVE # 5.74
Description: ELECTRIC LOCKS PLAN REVIEW
Applicant Name: PROJECTDOX, PROJECTDOX TESTER
Submittal(s): These plans were submitted: 10/25/2019
Approval Date: These plans were approved for permitting on: 10/25/2019
Plan Location: Plans were returned to applicant on 10/25/2019

Begin the plan revision project application process

Back

Select the "**Begin the plan revision project application process**" button.

Commercial Plan Review Revision Application

Project/Situs Information

Project Number: **19116541**   Application Number: **00055544**
Name on Situs: TEST FOR ILMS CLIENT VERSION 5-74 UPGRADE
Property Address: 911 WASHINGTON AVE # 5.74
City/State/Zip: HOUSTON, TX 77002
Project Use: ELECTRIC LOCKS PLAN REVIEW
Estimated Valuation: $0

Are you adding additional scope of work not originally covered in the project?
Yes: ○ No : ◉

Are you adding square footage to the original foot print or lease space?
Yes: ○ No : ◉

Are you adding any additional impervious cover above the originally approved design?
Yes: ○ No : ◉

Are you changing the original occupancy classification or use of the building?
Yes: ◉ No : ○

Based on your answer you do not qualify for a Project Revision. You must start a new application.

Submit

Answer the following 6 questions to find out if you qualify for the revision.

If you answer "**Yes**" to any of the questions from 1 to 4 or 6, you do not qualify for a revision.

You will have to start a new building permit application for the proposed scope of work.

Plan Review Revision

QUALIFICATION

If you answer, **"No"** to all the 6 questions, you qualify for a revision. Click the **Submit** button to continue. You will be directed to the shopping cart maintenance page.

NOTE: If you are requesting the revision with 1 or 2 trades and three or fewer sheets for each trade, please select **"Yes"** to question number 5 to qualify for the reduced rate revision.

Commercial Plan Review Revision Application

Project/Situs Information

Project Number: **19116541**   Application Number: **00055544**

Name on Situs: TEST FOR ILMS CLIENT VERSION 5-74 UPGRADE
Property Address: 911 WASHINGTON AVE # 5.74
City/State/Zip: HOUSTON, TX 77002
Project Use: ELECTRIC LOCKS PLAN REVIEW
Estimated Valuation: $0

Are you adding additional scope of work not originally covered in the project?
Yes: ○ No : ◉

Are you adding square footage to the original foot print or lease space?
Yes: ○ No : ◉

Are you adding any additional impervious cover above the originally approved design?
Yes: ○ No : ◉

Are you changing the original occupancy classification or use of the building?
Yes: ○ No : ◉

Is the revision limited to 1 or 2 trades and three or fewer sheets? If so, based on the fees paid to date, you qualify for a minimum fee review.
Yes: ○ No : ◉

Are you adding more than 15% ($0) of additional cost valuation to the original cost of improvements
Yes: ○ No : ◉

You qualify for a Project Revision.

Submit

Plan Review Revision

PAYMENT PROCESS

Select the appropriate payment method to pay for the revision.

If you select, **Make Online Payment via Credit Card or Electronic Check**, you will be transferred to the ILMS Shopping Cart Online Payment Processing screen where you will enter the payer information.

Click the **Update Payer Information** button then click the **Continue the Credit Card/Electronic Check Payment** process button.

You will be transferred to the Chase® PayConnexion website where you will enter your credit card information or electronic check information and complete the transaction.

Plan Review Revision

PAYMENT PROCESS

If you select **Charge this to my APA Account**, you will be transferred to the ILMS Shopping Cart APA Payment screen.

Select the APA by clicking on the radio button besides it and then click the **Submit APA Payment** button

Once the payment is made, select the **"Return to Shopping Cart List Maintenance"** button to view the project number for this revision.

The project number will appear in red font in the iPermits Shopping Cart Maintenance screen. You will then receive an invitation email from ProjectDox® to upload your plans.

Login to ProjectDox® system to upload the drawings and documents. Submit them for the revision plan review.

NOTE: When submitting an electronic revision to a plan that was approved on paper, a copy of the previously approved sheets is required to be uploaded into the **Drawings for Reference Only** folder along with the revised sheets.

Deferred Submittals

APPLICATION PROCESS

The process of setting up a revision is similar to setting up a new project on the iPermits Portal.

iPermits Online Service Menu
Building Permit Applications
Office of the City Engineer Plan Review Application

Logon to iPermits and click on **Building Permit Applications**.

Electronic Building Permit Applications
This page allows you to view Electronic Plan Review applications that are attached to your user profile.
Begin New Application

On the next screen click on **Begin New Application**.

Commercial Applications
Electronic Locks
Fire Alarm
Sprinkler
Underground Fire Line Plan Check
New/Remodel Commercial Building Permit Application
Site Work Permit Application
Plan Revision Application for an Existing ILMS Project
Deferred Submittal Application for an Existing ILMS Project

Click on **Commercial Applications**. From the list of available applications, please select the **"Plan Revision Application for an Existing ILMS Project"**.

Begin a Deferred Submittal Project Application

─── Please read the following information before proceeding ───

Deferred submittals are defined as those portions of the design that are not submitted at the time of the application and that are to be submitted to the Building Official within a specified period. Deferral of any submittal items shall have the prior approval of the Building Official.

A partial list of acceptable deferred submission items are:

- Precast Panels (Non-Fire rated construction)
- Prefabricated metal buildings (Non-Fire rated construction)
- Prefabricated access floor systems
- Interior retractable bleachers
- Precast Panels (Non-Fire rated Construction)
- Canopies and/or awnings
- Spires (Non-Fire rated Construction)
- Prefabricated steel stairs
- Prefabricated steel storage racks (no High-Pile storage)
- Prefabricated wood truss details & layout

Please enter the project number that needs a Deferred Submittal

Project # 12345678
Submit
Reset

Enter the **project number** and select the **Submit** button to verify the project information and begin the application process.

Deferred Submittals
APPLICATION PROCESS

Deferred Submittal Project Verification

─ Please review and confirm this is the project requiring a deferred submittal ─

Project Number: **19116523**

Address: 911 WASHINGTON AVE # 5.74
Description: REMODEL, OFFICE
Applicant Name: PROJECTDOX, PROJECTDOX TESTER
Submittal(s): These plans were submitted: 10/21/2019
Approval Date: These plans were approved for permitting on: 10/28/2019
Plan Location: Plans were returned to applicant on 10/28/2019

[Begin the project application process]

[Back]

Click the button **"Begin the project application process"** to start the deferred submittal application.

Deferred Submittal Project Application

─ Project/Situs Information ─

Project Number: **19116523**   Application Number: **00055524**

Name on Situs: TEST FOR ILMS CLIENT VERSION 5-74 UPGRADE
Property Address: 911 WASHINGTON AVE # 5.74
City/State/Zip: HOUSTON, TX 77002
Project Use: REMODEL, OFFICE
Estimated Valuation: $150,000   Improvement Square Footage: 10,000

─ Please select the appropriate deferred items pertaining to this application ─

Select	Description
☐	Precast Panels (Non-Fire rated construction)
☐	Prefabricated metal buildings (Non-Fire rated construction)
☑	Prefabricated access floor systems
☐	Interior retractable bleachers
☐	Precast Panels (Non-Fire rated Construction)
☐	Canopies and/or awnings
☐	Spires (Non-Fire rated Construction)
☑	Prefabricated steel stairs
☐	Prefabricated steel storage racks (no High-Pile storage)
☐	Prefabricated wood truss details & layout

Other #1 [_____]
Other #2 [_____]
Other #3 [_____]

Please note   The item(s) selected MUST have been identified as deferred submissions during the plan review process of the project mentioned above.

For additional information click the following link to view the deferral request form which as already mentioned should be completed and included as part of the original project application. Deferral Submission Request

[Submit]

Select the appropriate deferred items from the list and click on **Submit** button.

NOTE: All items designated with an asterisk (*) in the table require a City of Houston Approved Fabricator. To obtain a list of approved fabricators please click here.

Deferred Submittals

PAYMENT PROCESS

Select the appropriate payment method to pay for the deferred submittal

If you select, M**ake Online Payment via Credit Card or Electronic Check**, you will be transferred to the ILMS Shopping Cart Online Payment Processing screen where you will enter the payer information.

Click the **Update Payer Information** button then click the **Continue the Credit Card/Electronic Check Paymen**t process button.

You will be transferred to the Chase® PayConnexion website where you will enter your credit card information or electronic check information and complete the transaction.

Deferred Submittals
PAYMENT PROCESS

If you select **Charge this to my APA Account**, you will be transferred to the ILMS Shopping Cart APA Payment screen.

Select the APA by clicking on the radio button besides it and then click the **Submit APA Payment** button

Once the payment is made, select the **"Return to Shopping Cart List Maintenance"** button to view the project number for this revision.

The project number will appear in red font in the iPermits Shopping Cart Maintenance screen. You will then receive an invitation email from ProjectDox® to upload your plans.

Login to ProjectDox® system to upload the drawings and documents. Submit them for the revision plan review.

Additional Permit Applications for Subprojects
CORRECTION REQUEST

When the Regulatory Compliance Coordinator (RCC) or a Structural Plan Analyst requests that you to create additional application(s), you will receive an email with the instructions.
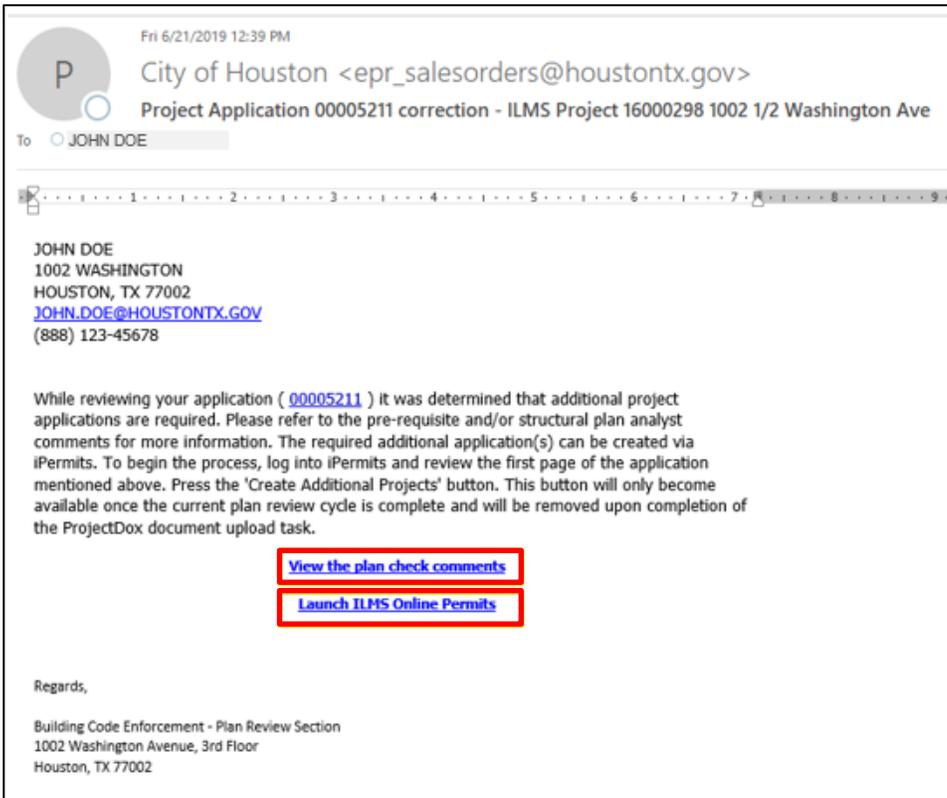
View the comments from structural plan analyst by clicking **View the plan review comments** from the email.

Use the link **Launch ILMS Online Permits** to login to iPermits.

From the list of existing applications, click on the appropriate application number (specified in the email).

Additional Permit Applications for Subprojects
CORRECTION REQUEST

You will be transferred to Application Page 1

To create an additional application, click on the **Create an additional Application** button and you will be transferred to the **Copy this application** page.

Make changes to the project information where it is necessary and select the **"Copy and Continue"** button to copy the application.

The original application will be converted as a master application and this new application will be created as a sub application.

Additional Permit Applications for Subprojects

APPLICATION PROCESS

Enter the info on page 2 and select **Save and Continue** button to go to the **Attach Documents / Finalize Application** page.

Additional Permit Applications for Subprojects

APPLICATION PROCESS

You can attach any documents associated with this application on this page.

Click on the **Copy this Application** button to create another sub application.

Select the **Return to Master Application Recap** button to see the details about the master and sub project applications

Select the sub application number and go to Page 2 of the application to finalize the sub application.

Additional Permit Applications for Subprojects

APPLICATION PROCESS

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

Once you finalize the application, you will return to the Existing Applications list page. The application number button changes to **green** for the master application.

Select the master application number to view the project number for sub application.

Click the subproject's application number to pay for the plan review (PX) fee.

Index

STANDARD FOLDER STRUCTURE WITH UPLOAD REQUIREMENTS

📁 Cover Sheet
📁 Documents – No upload.
    📁 Prerequisite Check list - PreReq form 1301 or 1105.
    📁 Utility Letters - Water and wastewater letter and storm water information form.
    📁 Forms – No uploads.
        📁 Energy Forms – Codes - ComCheck / ResChek, IC3, REMRATE
        📁 Deferred submittal – Completed Form 1086 form
        📁 Grade and Fill - Completed Fill & Grade Form CE-1094 form
        📁 Impervious Cover Calculation - Completed form CE-1248/ Form CE-1207
        📁 Landscape analysis – Completed Landscape analysis form
        📁 Sound Attenuation - Completed form CE-1202 form
    📁 Manufacturing Specs - Walk in coolers specs, vent hoods, prefab metal building plans
    📁 Geotechnical Reports - Soil Report
    📁 Asbestos Survey - Report from DSHS Licensed Inspector or Asbestos Free Letter from Engineer or Architect signed, sealed and dated.
    📁 ARA Application - Time stamped ARA application
    📁 U.L. Designs – Fire rated testing criteria
    📁 Owner Statement of Intended Use - Completed form CE-1120
    📁 Occupant Reduction Letter – Signed reduced occupant load letter
    📁 Approved Code of Records – Signed Code of record letter from Building Official
    📁 Approved Alternate Methods - Letter from Building Official
    📁 Fire Suppression Product Data and Calcs – Fire Suppression Product Data & calcs
    📁 Miscellaneous – Other documents that do not have a specific folder
    📁 Applicant Responses – Applicant Responses only
    📁 Flood
    📁 Planning
    📁 Traffic
    📁 Fire
    📁 Health
    📁 Urban Forestry

See "Standard Folder Structure" for more information regarding upload requirements.

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STANDARD FOLDER STRUCTURE WITH UPLOAD REQUIREMENTS

- 📁 Drawings – No upload.
    - 📁 Index – Drawing Index only
    - 📁 General - Project notes, ADA drawings and notes
    - 📁 Demo - Demo plans only
    - 📁 Site Plan - Site plans only, paving, lot lines, easements
    - 📁 Architectural - Elevations, floor plans, design details
    - 📁 Landscape - Landscape plans
    - 📁 Structural - Engineered drawings structural, load bearing, fire rated
    - 📁 Electrical – Electrical load analysts, panel schedule, one-line diagram, power plan
        - 📁 Low Voltage – Low voltage electrical plans
    - 📁 Plumbing – Plumbing floor plan, riser diagram
    - 📁 HVAC – HVAC Floor Plan with layout
    - 📁 Civil – Civil site plan, paving plans
        - 📁 Storm Drainage - Drainage, grading, retention plans
        - 📁 Mitigation (if applicable) - Flood plan
        - 📁 Water / Wastewater - Utility plans
        - 📁 Plat – Survey - Survey or recorded subdivision plat
    - 📁 Health – Food and Beverage Services – Kitchen equipment, Kitchen finishes plans
    - 📁 Electric Locks – Electric lock drawings
    - 📁 Fire Marshal – No upload.
        - 📁 Haz – Mat – Hazmat drawings
        - 📁 High – Pile – High pile drawings, Rack plans
        - 📁 Standpipes – Pump Room Details
        - 📁 Alarm – Fire alarm plans
        - 📁 LP Gas – Natural Gas – LPG tank plans
    - 📁 Fire Suppression – No upload.
        - 📁 Sprinklers – Above Ground – Above ground sprinkler plans
        - 📁 Sprinklers – Add and Relocate – Add and relocate sprinkler plans
        - 📁 Underground Fire Lines – Underground fire line plans
    - 📁 Urban Forestry – Drawing
    - 📁 Drawings for Reference only –Separately permitted work such as foundation plans, sitework plans. Also reference drawings for revisions
    - 📁 Reviewer Attachments
    - 📁 Approved
    - 📁 Quick Review

> For further clarification regarding upload requirements please contact the respective business group.

Index

HOW TO RUN REPORTS IN PROJECTDOX®

Step 1: Log in to your ProjectDox® account and select the project number to run report.

Step 2: Click on the Reports tab. Click on the magnifying glass for the report your wish to run.

Index

Step 3: Click on Drop Down arrow. Select the report and Click "**View Report**".
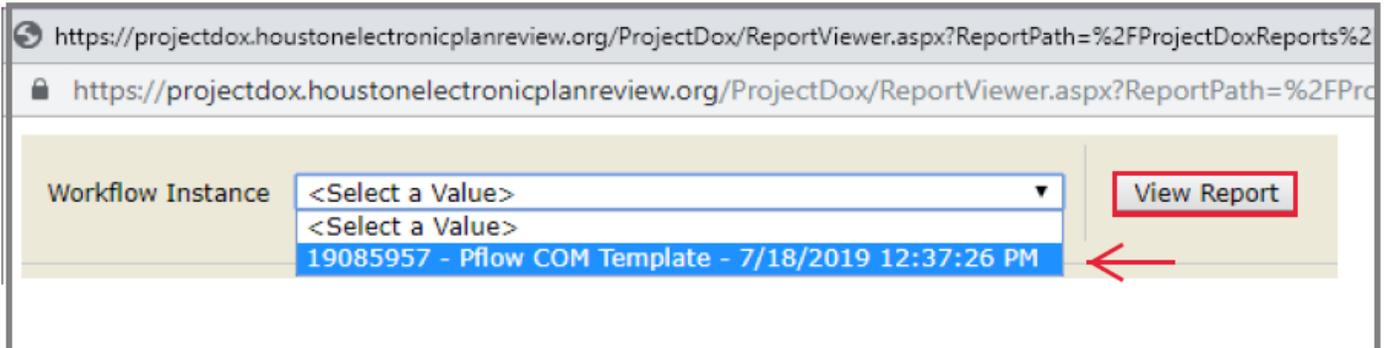

Example of report shown below
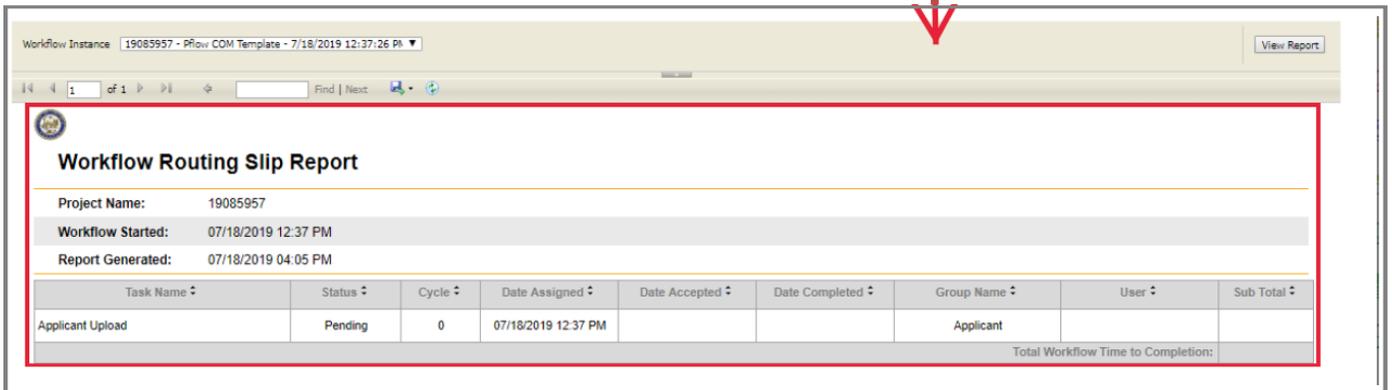
INDEX
STANDARD BORDER-DETAIL SAMPLE
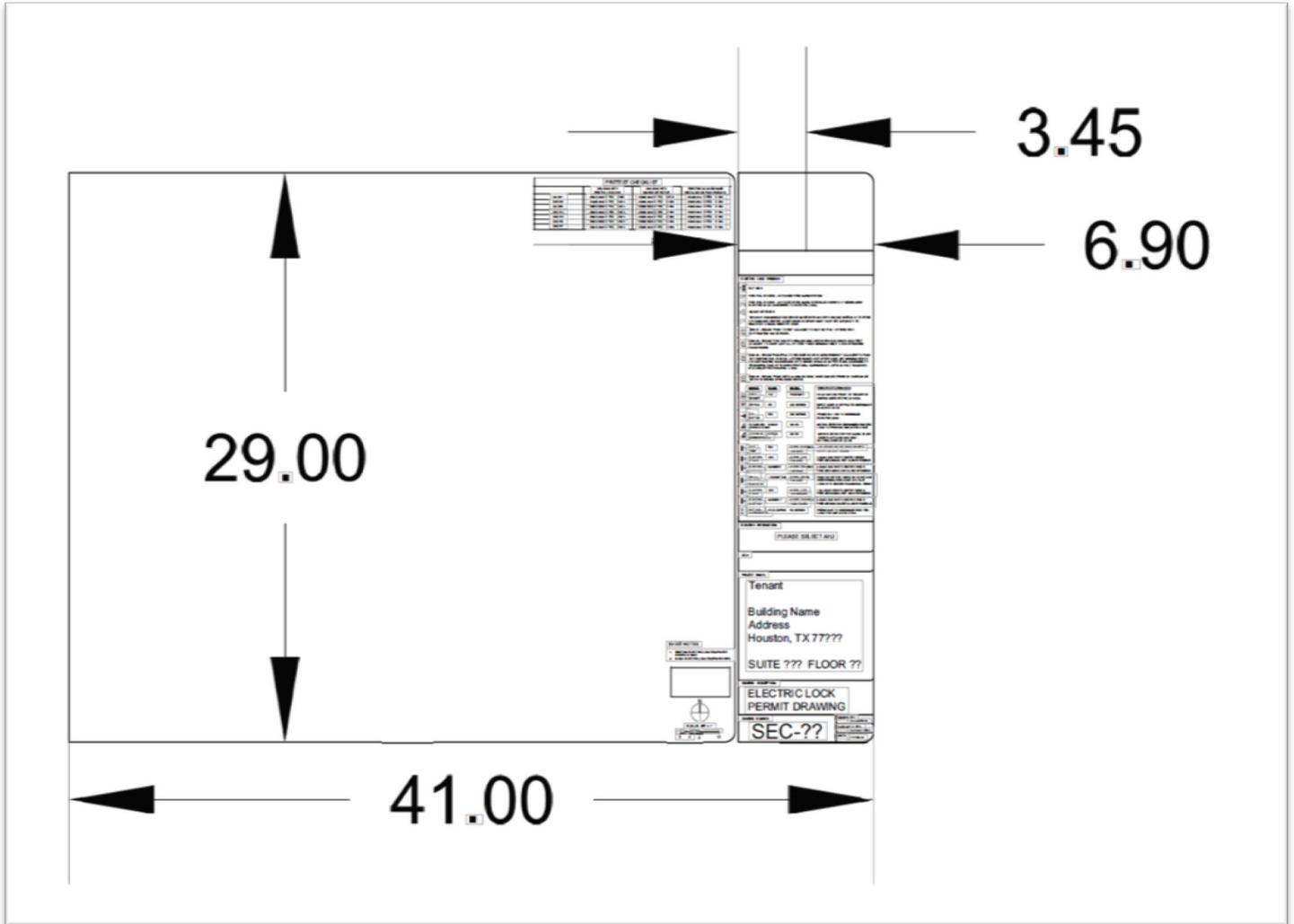
Thanks for using electronic plan review!

If you need further assistance, please contact us via email at
commercial.planreview@houstontx.gov.

HOUSTON
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