HOUSTON PUBLIC WORKS
Houston Permitting Center

Office of the City Engineer Plan Review

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

PAPER PLANS ARE NO LONGER NEEDED

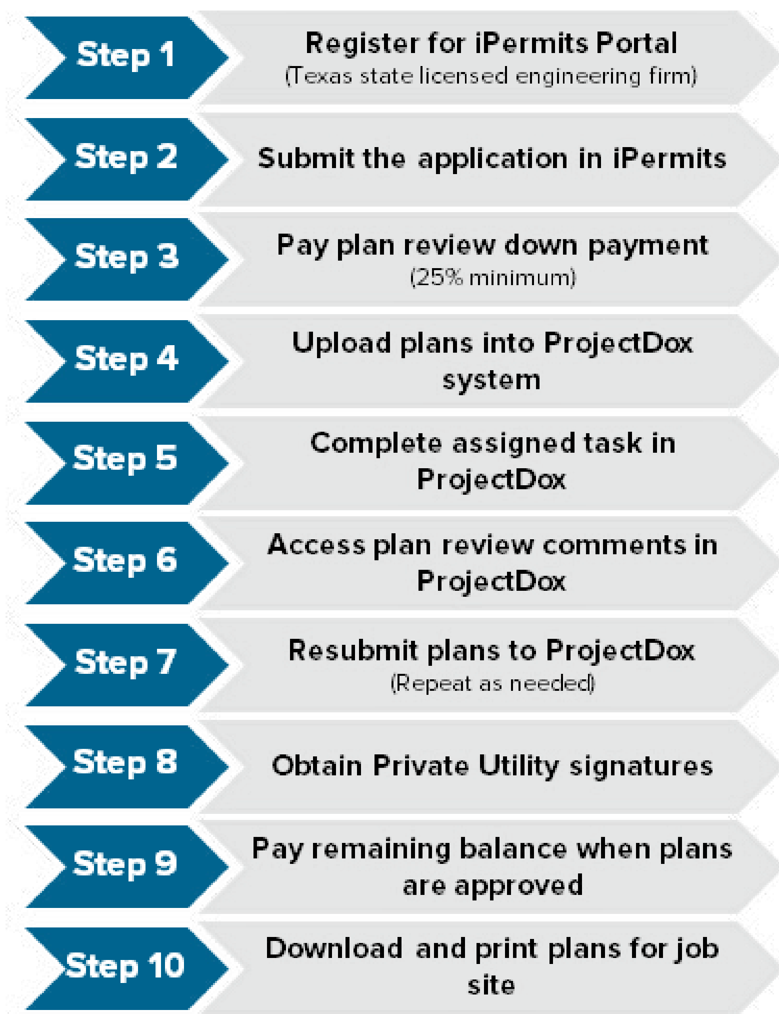
Table of Contents

Overview

ELECTRONIC PLAN REVIEW PROCESS

The purpose of this document is to provide general information on the process for registering the Engineering firm with the iPermits Customer Portal for Office of City Engineer Plan Review, and the electronic plan review system called ProjectDox.

The electronic plan review process is broken down into 10 key steps. The process utilizes two systems: iPermits and ProjectDox.
The iPermits Customer Portal is used to submit applications and to make payments. ProjectDox is use to upload drawings, receive comments, and receive approvals.



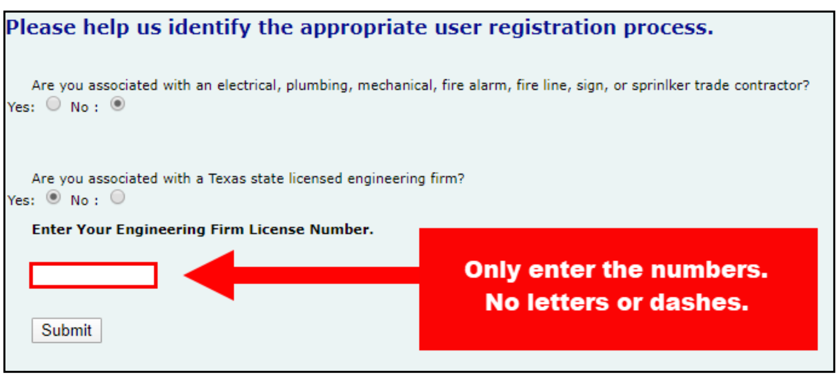
iPermits Registration

STEP 1: REGISTER AN ENGINEERING FIRM

Before a plan review application may be submitted to the Office of the City Engineer, an **Engineering Firm must have a company profile in iPermits.**

To create a company profile:

1. Register an Engineering Firm
2. Create a Security Administrator User Profile.
3. Register Additional Firm Users
4. Activate Newly Registered Firm Users



If the engineering firm is already registerd in iPermits, please skip to Step 3 on page 10.

From the **iPermits login** page, select the link **Click here to Register** next to *First-time user?*

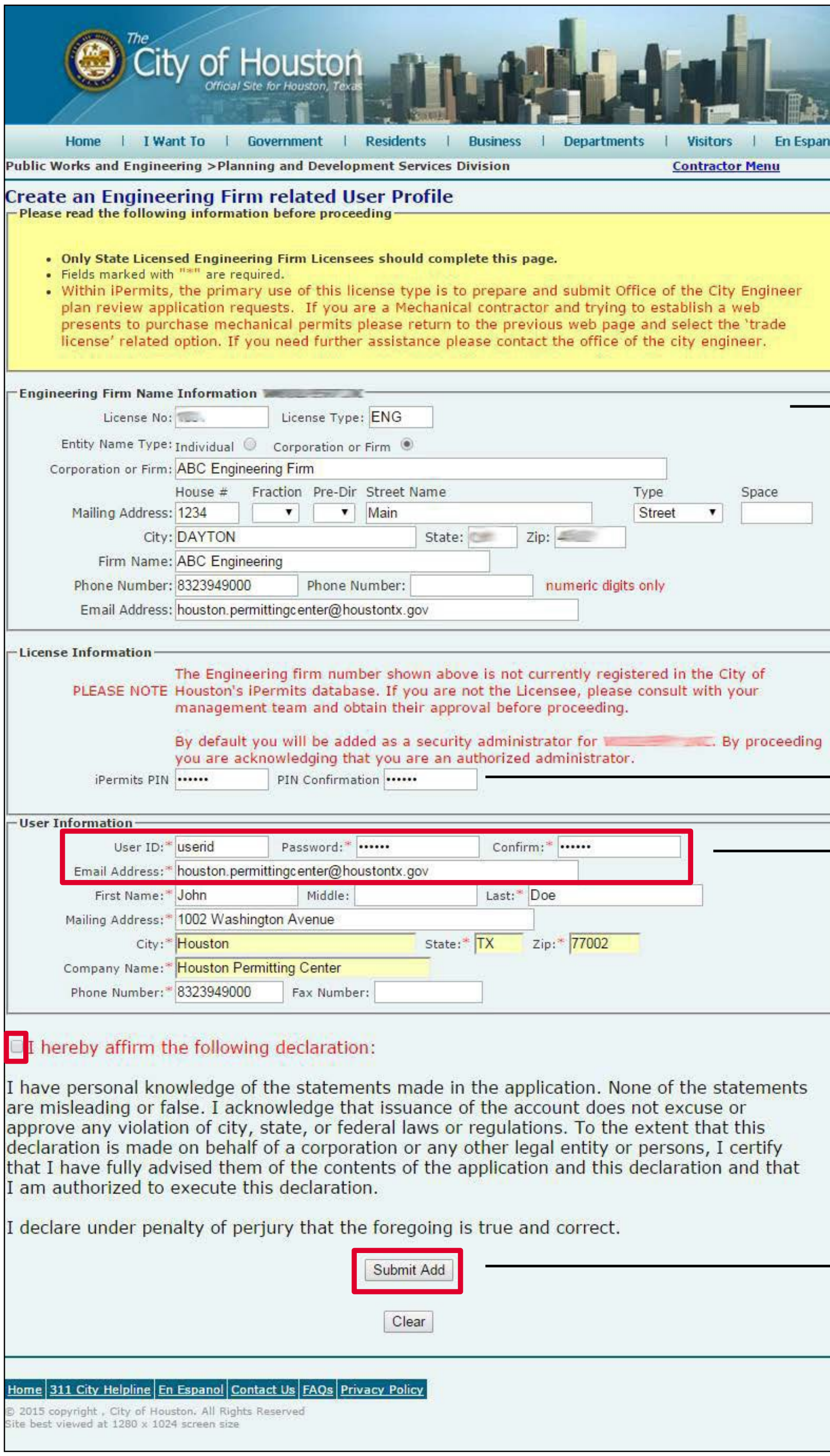
On the next screen, select **No** to the question," *Are you associated with an electrical, plumbing, or mechanical trade contractor?"*

Select **Yes** to the question, *"Are you associated with a Texas state licensed engineering firm?"* Enter your Texas State registered **Engineering Firm License Number** and click the **Submit** button.

Note: If your engineering firm license number is not in the iPermits database, please contact the Office of the City Engineer at oce@houstontx.gov

iPermits Registration

STEP 2: CREATING A SECURITY ADMINISTRATOR USER PROFILE



Complete any blank fields in the *Engineering Firm Name Information* section.

<u>Note: the first person to register a firm will become the security administrator and sets the master PIN</u>. Enter any 6-digit number in the **iPermits PIN** field and re-enter it to confirm.

Enter a **User ID** *(max. 8 characters)* and **Password** *(6-8 characters)* of your choosing and an email address. These will become your login credentials for iPermits. Complete the remaining required fields.

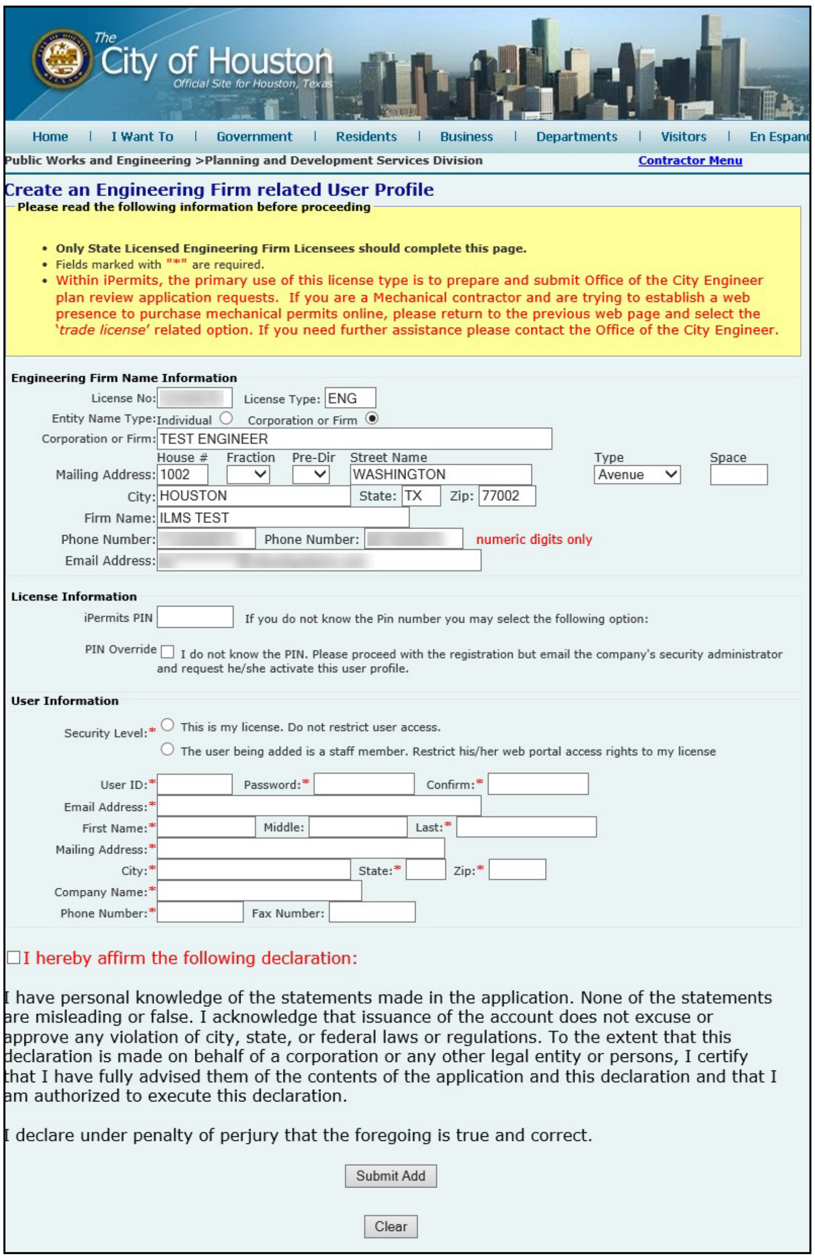
Check the disclaimer box and click **Submit Add** to complete registration.

iPermits Registration

STEP 3: CREATING ADDITIONAL USERS FOR A REGISTERED FIRM

From the iPermits login page, select the link **Click here to Register** and enter the Firm License number *(Refer to Step 1 for detailed instructions).*

Enter the **iPermits PIN** if it was given to you. Otherwise check the box for **PIN Override**. Choose the appropriate Security Level. *Note: users cannot select “This is my license” level without the iPermits PIN.*



The City of Houston
Official Site for Houston, Texas

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

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

Create an Engineering Firm related User Profile

Please read the following information before proceeding

- Only State Licensed Engineering Firm Licensees should complete this page.
- Fields marked with "*" are required.
- Within iPermits, the primary use of this license type is to prepare and submit Office of the City Engineer plan review application requests. If you are a Mechanical contractor and are trying to establish a web presence to purchase mechanical permits online, please return to the previous web page and select the ‘*trade license*’ related option. If you need further assistance please contact the Office of the City Engineer.

Engineering Firm Name Information

License No: — License Type: ENG
Entity Name Type: Individual ○ Corporation or Firm ◉
Corporation or Firm: TEST ENGINEER
Mailing Address: House # 1002 — Fraction — Pre-Dir — Street Name WASHINGTON — Type Avenue — Space
City: HOUSTON — State: TX — Zip: 77002
Firm Name: ILMS TEST
Phone Number: — Phone Number: — numeric digits only
Email Address:

License Information

iPermits PIN — If you do not know the Pin number you may select the following option:
PIN Override ☐ I do not know the PIN. Please proceed with the registration but email the company's security administrator and request he/she activate this user profile.

User Information

Security Level:* ○ This is my license. Do not restrict user access.
○ The user being added is a staff member. Restrict his/her web portal access rights to my license

User ID:* — Password:* — Confirm:*
Email Address:*
First Name:* — Middle: — Last:*
Mailing Address:*
City:* — State:* — Zip:*
Company Name:*
Phone Number:* — Fax Number:

☐ I hereby affirm the following declaration:

I have personal knowledge of the statements made in the application. None of the statements are misleading or false. I acknowledge that issuance of the account does not excuse or approve any violation of city, state, or federal laws or regulations. To the extent that this declaration is made on behalf of a corporation or any other legal entity or persons, I certify that I have fully advised them of the contents of the application and this declaration and that I am authorized to execute this declaration.

I declare under penalty of perjury that the foregoing is true and correct.

Submit Add

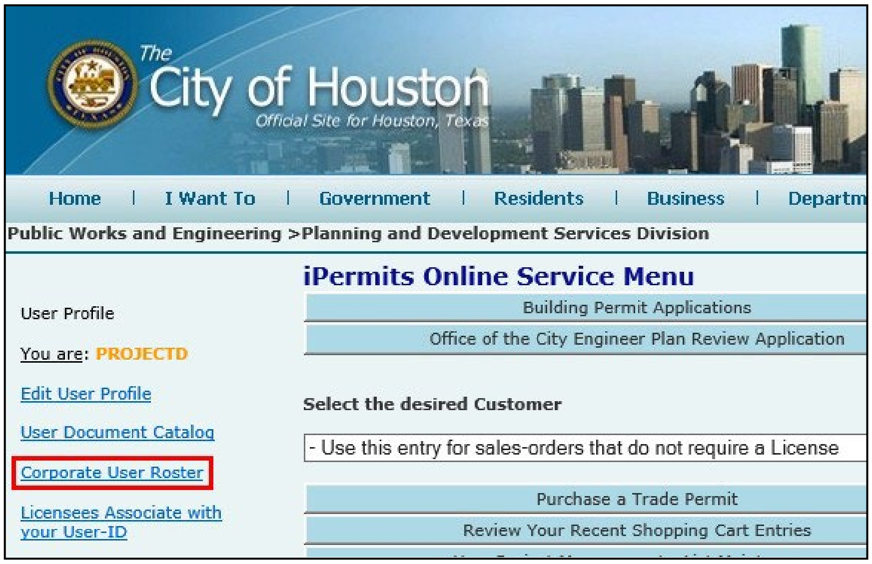
Clear

Enter a **User ID** *(max. 8 characters)* and **Password** *(between 6- 8 characters)* of your choosing and an email address. These will become your login credentials for iPermits. Complete the remaining required fields.

Check the disclaimer box and click **Submit Add** button to create a user profile. If *PIN Override* was selected, the Security administrator will be notified of the new user profile pending activation.

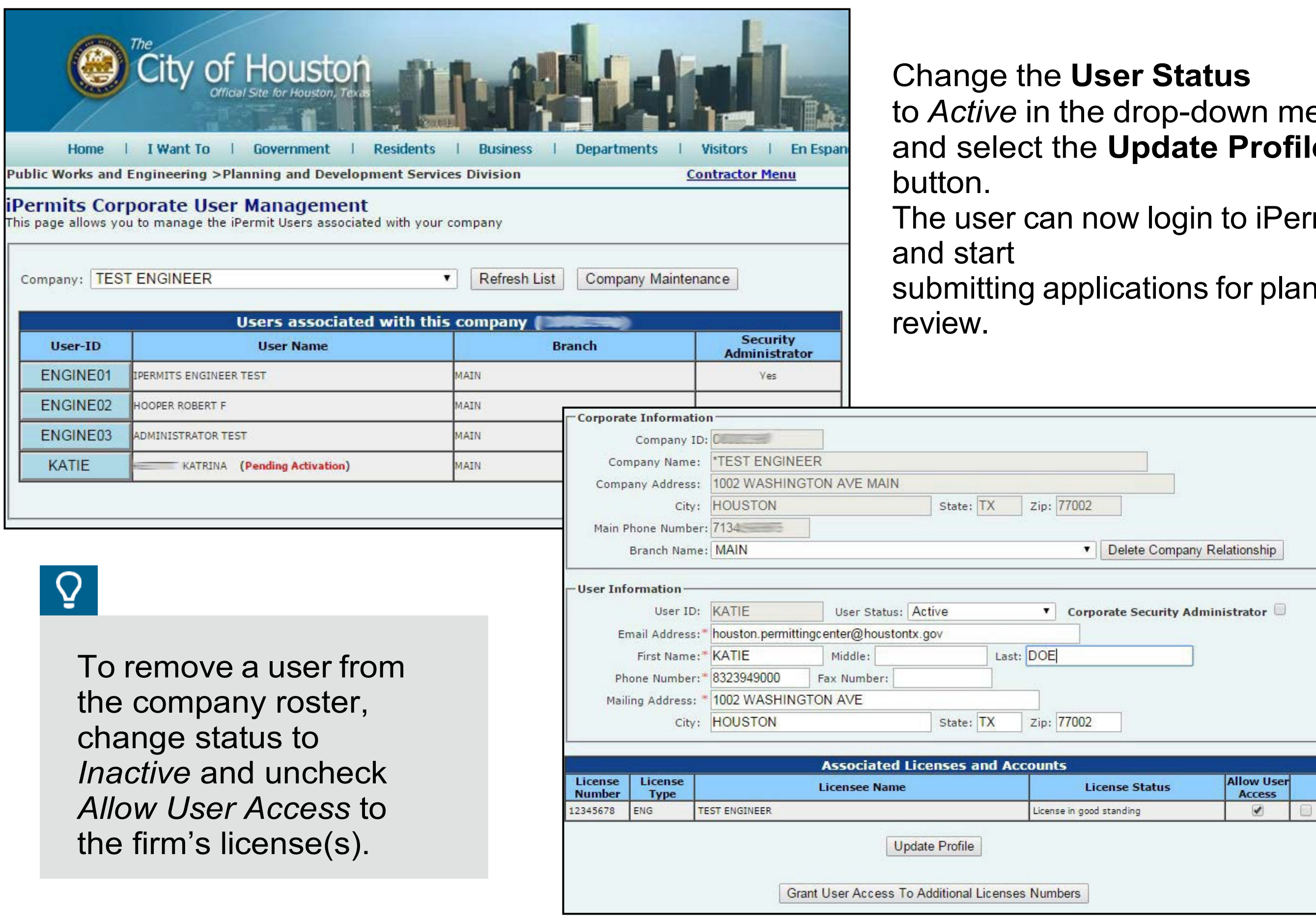
iPermits Registration

STEP 4: ACTIVATING A NEWLY REGISTERED USER



From the Security Administrator's iPermits account and select the link **Corporate User Roster**, located on the left side of the *Online Service Menu*.

The *iPermits Corporate User Management* screen displays all users associated with an Engineering Firm. Click on the **User ID** with the *Pending Activation* status.



Change the **User Status** to *Active* in the drop-down menu and select the **Update Profile** button.
The user can now login to iPermits and start submitting applications for plan review.

To remove a user from the company roster, change status to *Inactive* and uncheck *Allow User Access* to the firm's license(s).

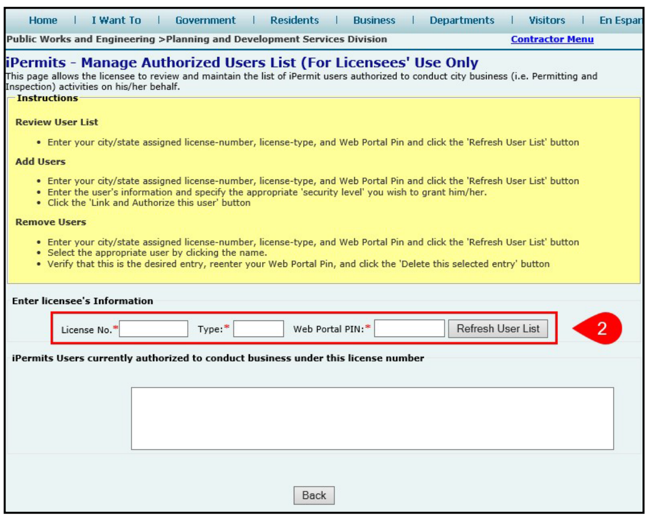
iPermits Registration

LINK AND AUTHORIZE THIRD PARTY USERS

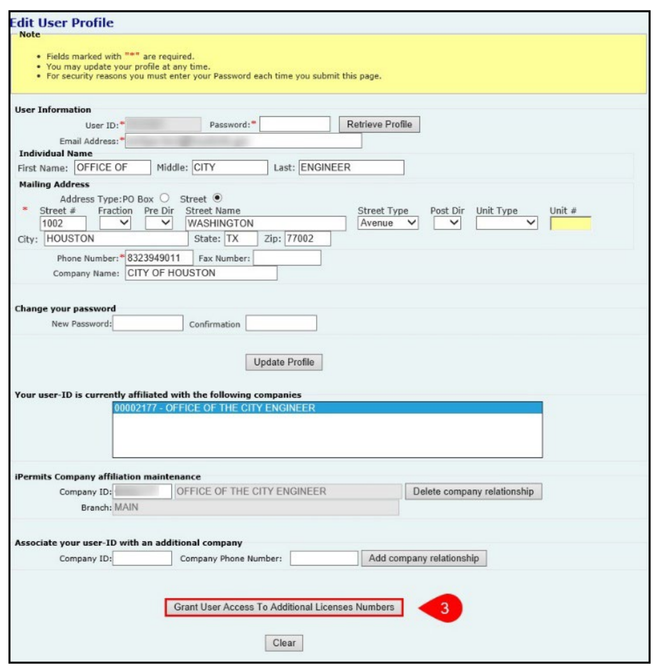
Once you have created the admin account. You may add users by the following steps:

1) Click on “Edit User Profile”.

2) Click on “Grant User Access to Additional Licenses Numbers” button.

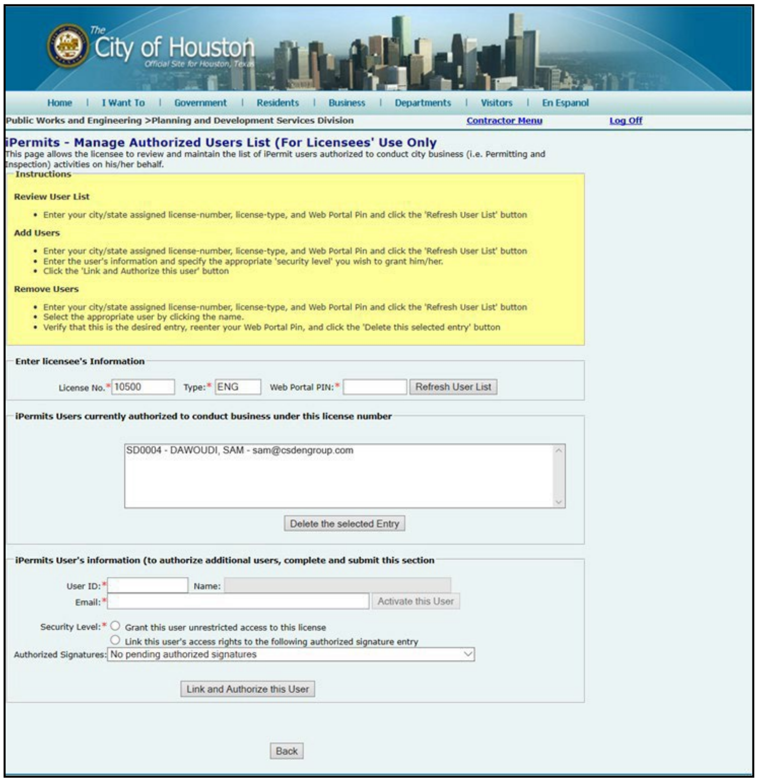


3) Enter license and type (“ENG” MUST BE ALL CAPITAL LETTERS) and Web Portal PIN and click the “Refresh User List” button.



iPermits Registration

LINK AND AUTHORIZE THIRD PARTY USERS



4. Under the iPermits User's information box. **Enter the User ID and Email address** for the user that you would like to link to your account.

5. Click the radio button "Grant this user unrestricted access to this license"

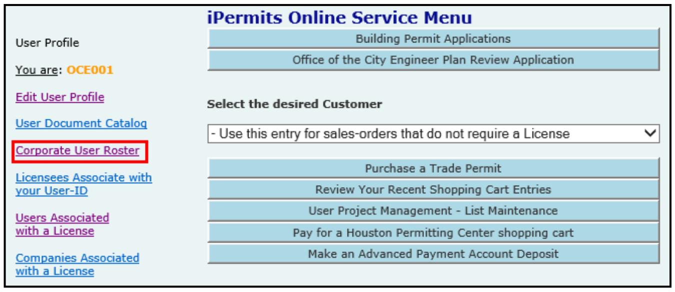
6. **PLEAE RE-ENTER THE PIN NUMBER** before selecting "Link and Authorize this User" button

Note: By selecting the Grant option does not mean that the user will have full access to your license.

iPermits Registration

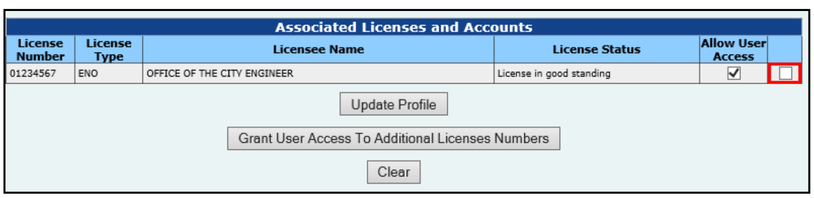
UNLINKING AND UNAUTHORIZING THIRD PARTY USERS

1) From the main menu, select the “Corporate User Roster” link on the left side.

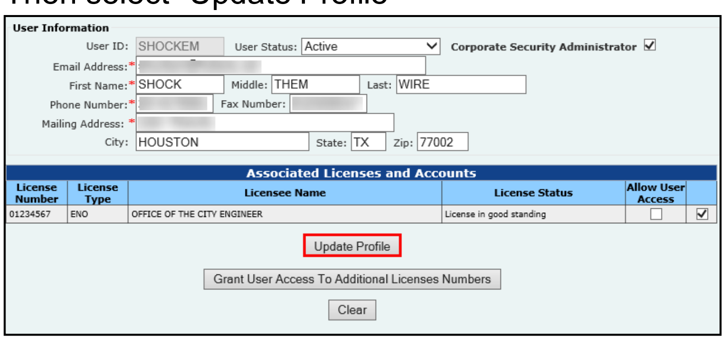


2) Then select the account you wish to remove access from.

3) Under “User Information” unmark the “Allow User Access” box



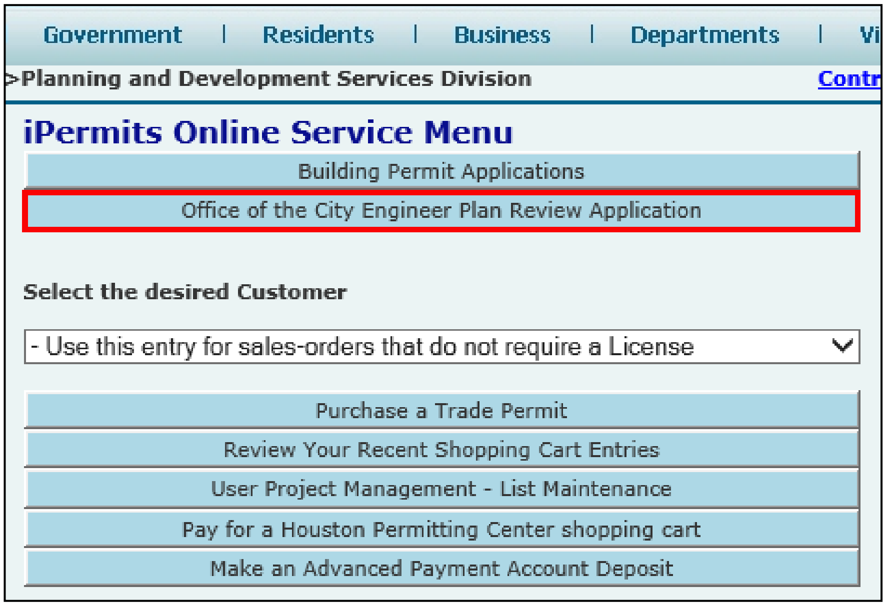
4) Then select “Update Profile”



5) This will remove that user from using your firms license information for future projects. You may go back and grant them access at any time if you are the Security Administrator.

iPermits Registration

INITIATING A NEW APPLICATION



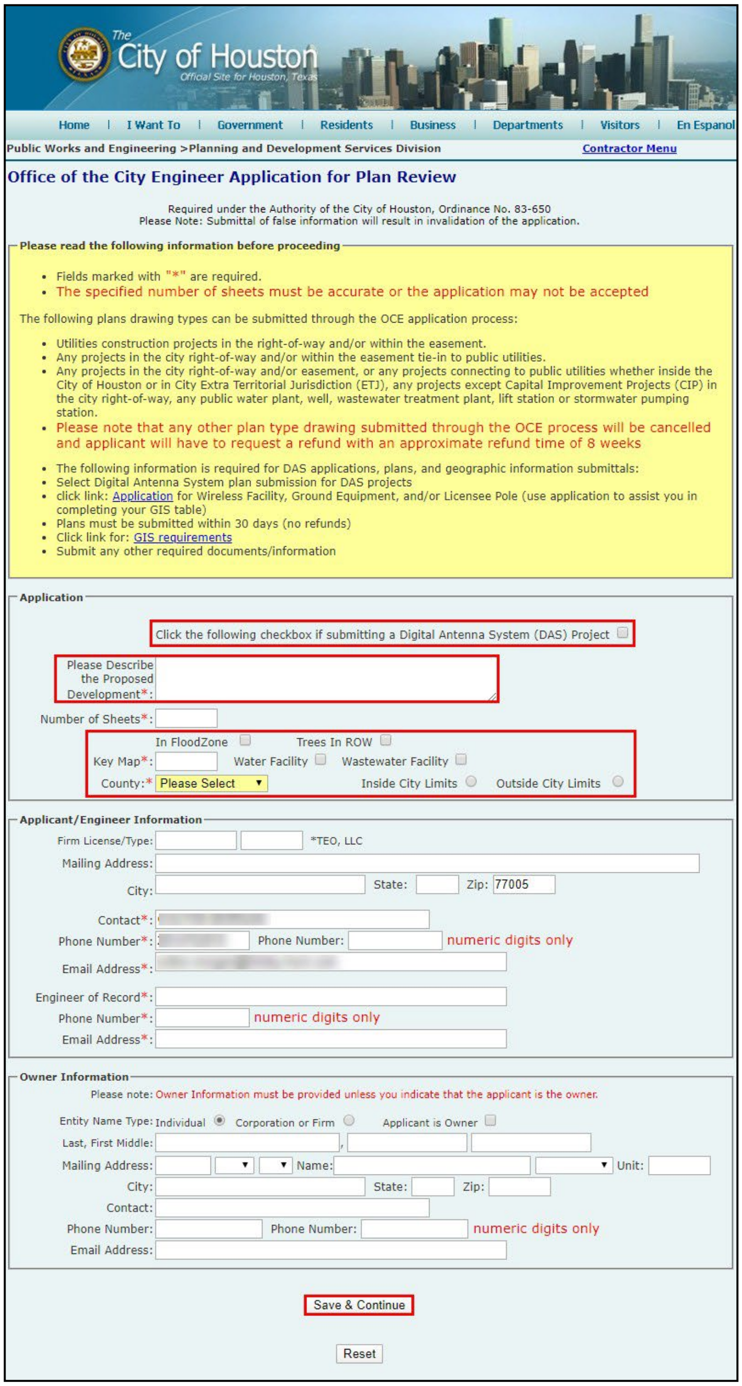
Log into your iPermits portal account. Under the iPermits Online Service Menu, click on the **Office of the City Engineer Plan Review Application** button as illustrated.

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

iPermits system will display the applications you have submitted during the last year, with status comments in red.

Application Process

COMPLETE A PLAN REVIEW APPLICATION



Enter the required information and when completed, click the **Save and Continue** button.

- Click the box if application is for a **DAS Project.**
- Enter the description from the cover sheet into the "Please describe the Proposed Development" box.
- If the project is in or partially in the flood zone, check the box for **In Flood Zone**.
- If the project is inside COH city limits and there are trees in right-of-way, check the box for **Trees in ROW** to include Urban Forestry into the plan review.
- If the project has a water plant, water wills or contract water, check the box for **Water Facility**.
- If the project includes a force main, lift station or reclaimed water line, check the box for **Wastewater Facility**.

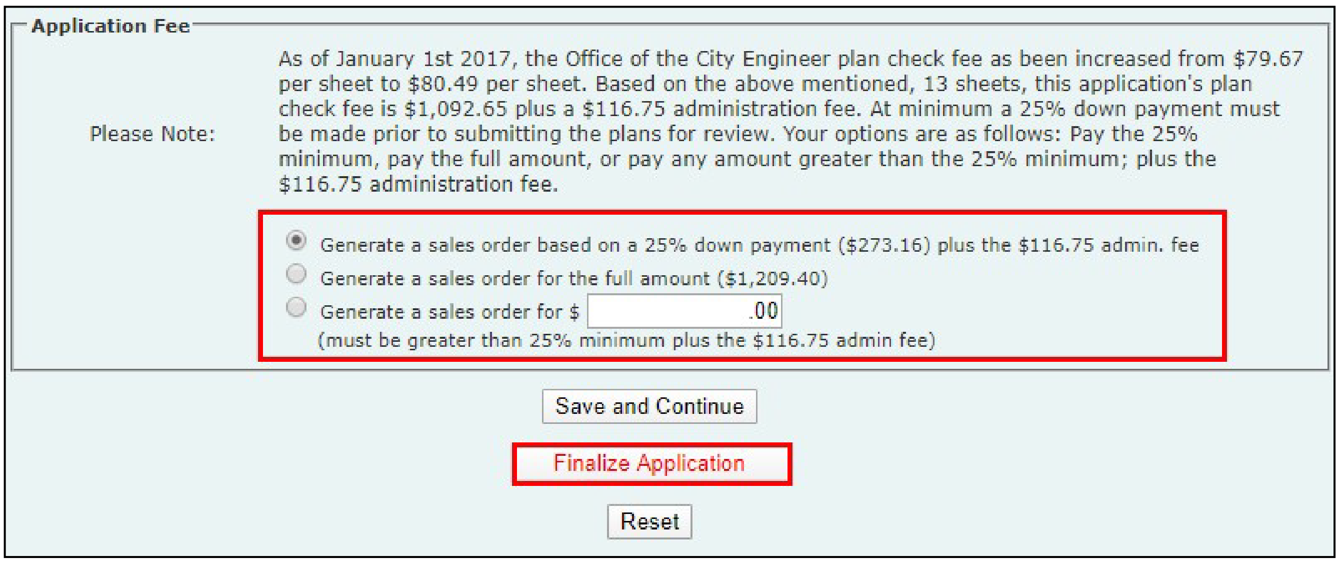
If you submit any incorrect information, it can result in delay of processing and/or rejection.

Application Process

CHOOSE PAYMENT AMOUNT

The page will refresh and display information about the application fee. **A minimum of 25% of the plan review fee plus the administration fee is due upon finalizing the application.**

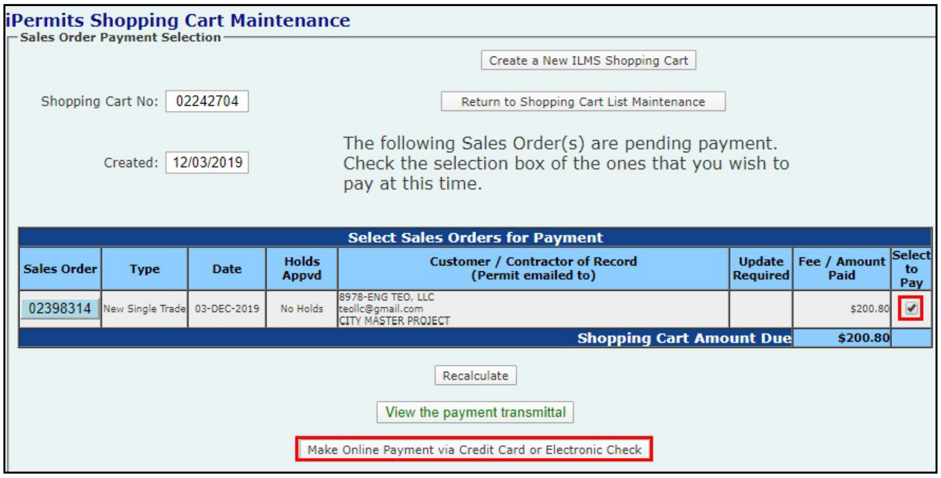
Choose a payment option to generate a sales order and click on the **Finalize Application** button.



ProjectDox will make the application information available on the eForm for the plan review team.

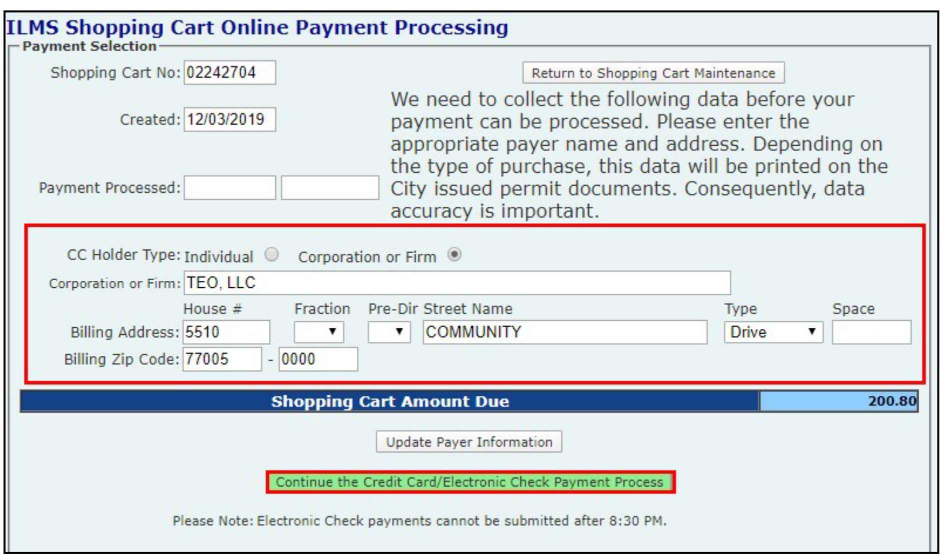
Pay the Plan Review Down Payment

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



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 if you do not receive a payment receipt from Chase.

ProjectDox Set Up
NEW USER ACCOUNT

Invitation to Join City of Houston Electronic Plan Review System

Dear [Applicant]:

You are receiving this email from the Office of the City Engineer in response to the plan review application for Project [Field 4] or you have been invited into the Project by the applicant [Field2]. Your project has been created in the ProjectDox system for you to upload drawings and documents for plan review. The ProjectDox system also allows you to check the real time status of the plan review and provides access to review comments.

System Requirements
Before using the ProjectDox system for the first time, please check the User PC Settings guide to configure the browser and computer settings.

User Name & Temporary Password
To log into your account, go to Project Access Link and enter the following user name and password:

User name: [Field1]
Temporary password: [Field7]

Upon logging in for the first time you will be asked to create a permanent password and complete the User Profile. We recommend that first time users review the OCE User Guide before uploading drawings/documents.

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

Project Number:	[Field4]
Applicant Name:	[Field2]
Applicant Email Address:	[Field1]

SAMPLE INVITATION

Once the plan review down payment has been received, an invitation (see above) will be sent to the applicant to upload drawings and documents into ProjectDox.

For new users, the invitation will contain a temporary password. Subsequent project 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.
- Please use the **User PC Settings** guide from the login page for instructions and other browser specific settings you need to make for the ProjectDox system.
- 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

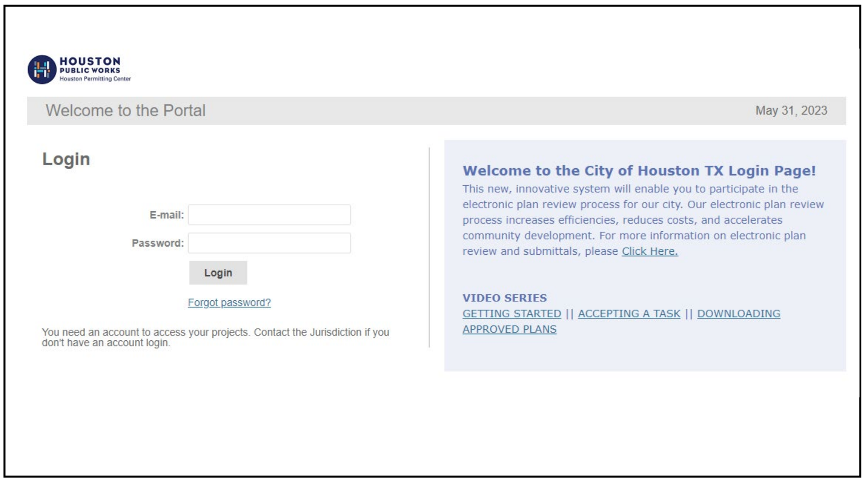
From the invitation, click on the **Login to ProjectDox** link or **Project Access** link to open the login page using your default web browser. You can also type or paste the ProjectDox URL into another web browser.

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; you must complete the required yellow fields:

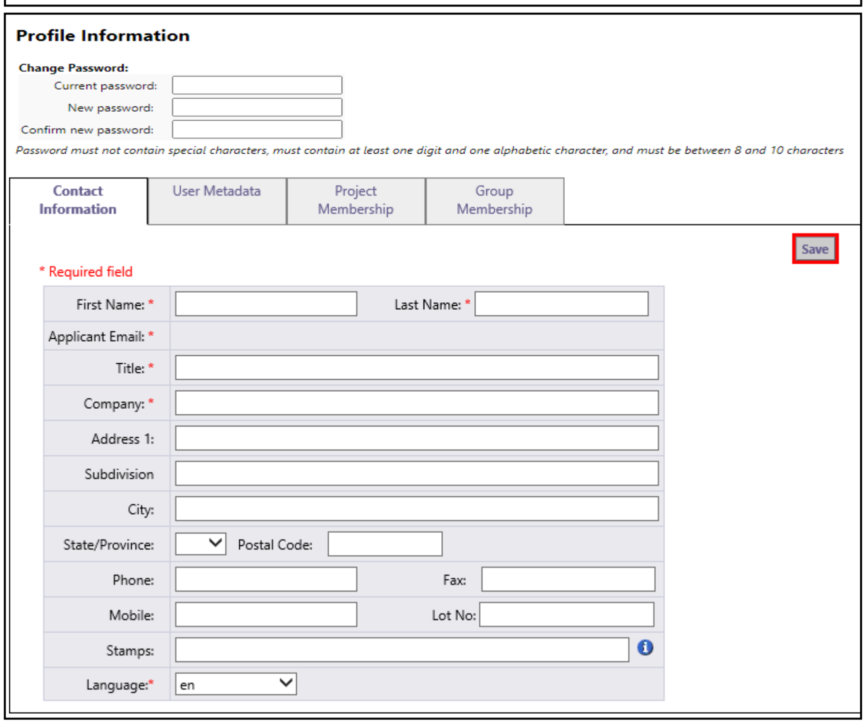
- Change your password
- Contact information

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



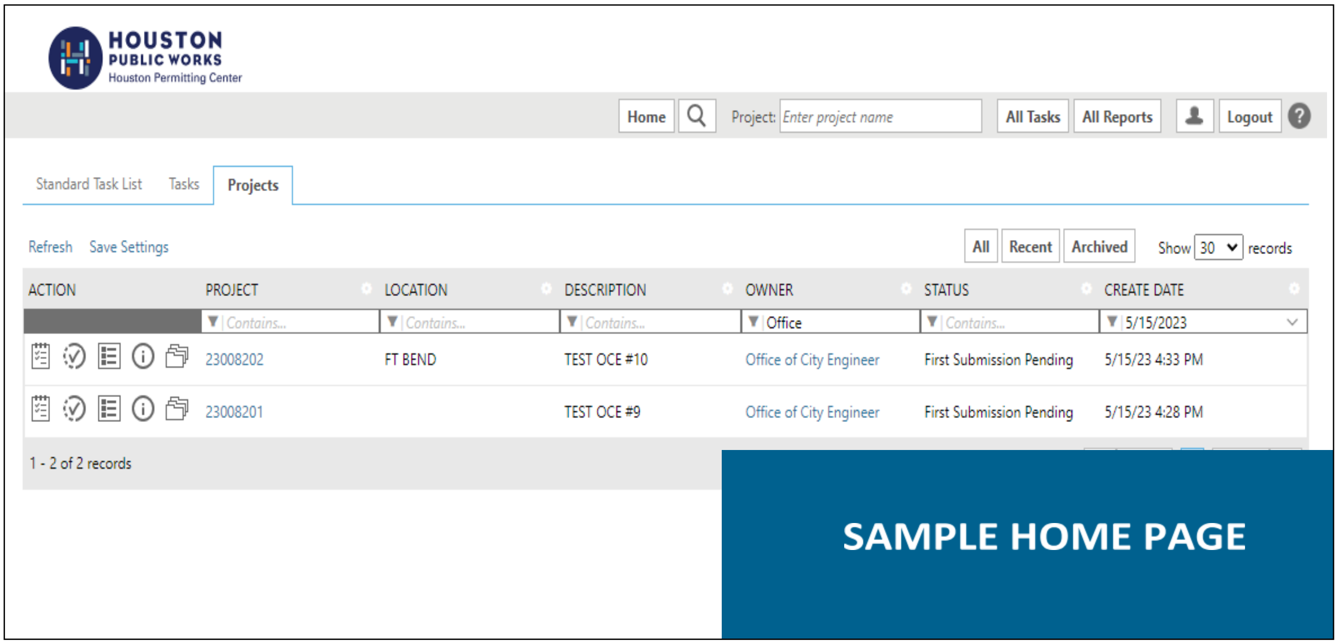
If you ever forget your password, click on the **Forgot Your Password?** link.

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



Navigation Basics

HOME PAGE TOOLBARS



The ProjectDox home page is divided into two main sections.

The **Projects** section displays basic information about every project you've submitted for electronic plan review as an applicant and/or the list of projects you have been invited as a design team member.

The **All** Projects button list all your projects.

The **Recent** Projects button displays projects accessed in the last 30 days.

Projects can be sorted by clicking on the header of the specific column. (i.e., Project, Location, Description, Owner...)

You can enter keywords related to your specific project through the **Search** field. Searches can also be done through the column's header (i.e., Project, Location, Description, Owner…)

The **Tasks** tab section 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.

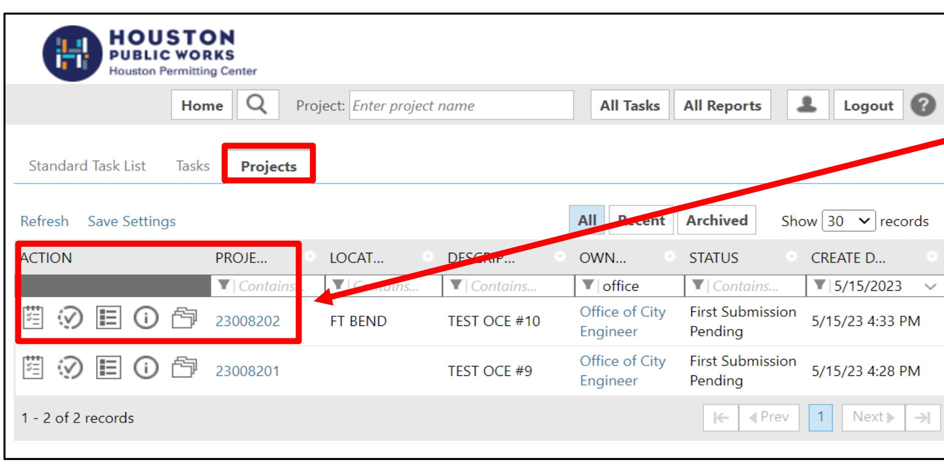
ProjectDox can be used in multiple browsers, including Chrome, Safari, FireFox, and Edge. Review the *System Use Requirements* document located on the ProjectDox login page to ensure proper set up is completed.

Navigation Basics

HOME PAGE TOOLBARS

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

- The **Home** button will take you back to the Home Page.
- The **Search** button allows you to search for a project based on key information entered on the Project Info Page, or it allows you to search for keywords within a project.
- The **All Task** button shows any tasks requiring action from you.
- The **Profile** button will take you to your User Profile, where you can edit your personal information or change your password.
- The **Logout** button logs you out of ProjectDox.
- The **Help** button takes you to the ProjectDox® Help site. Use the index or search functions to find instructions on specific aspects of ProjectDox®



From the Home screen on the **Projects** tab, you can view your projects and perform the following actions.

- View Pending Tasks
- Project Status
- Project Reports
- Project Info
- View and Upload files

Standards

FILE TYPES AND NAMING

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

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.

DRAWING STANDARDS

- Drawings should include graphical scale
- The City of Houston requires that plans be uploaded in an approved format, to scale, with an output dimension of 22" x 34"
- 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.

FILE NAMING

For all the construction plans in the City of Houston Right Of Way and Utilities Easements, please comply with all the standards from the Infrastructure Design Manual.

File names are limited to 70 characters. Corrected files should always be resubmitted with the SAME FILE NAME as the original submittal. ProjectDox will automatically detect changes in resubmitted files of the same name and version it. This feature allows the Engineers to overlay versions during reviews. **Note: If this is not followed the submitted file will appear as a NEW file, and not a correction to an existing file.**

File names should have the page number and a brief description of what the file is. For example: 01 - Cover, 02 - General Notes, 03 - Plan and Profile. Please add "0" to single digit page numbers to avoid the page jumping from 1, 11, 12, etc. (if more than 10 pages).

FOLDER STRUCTURE

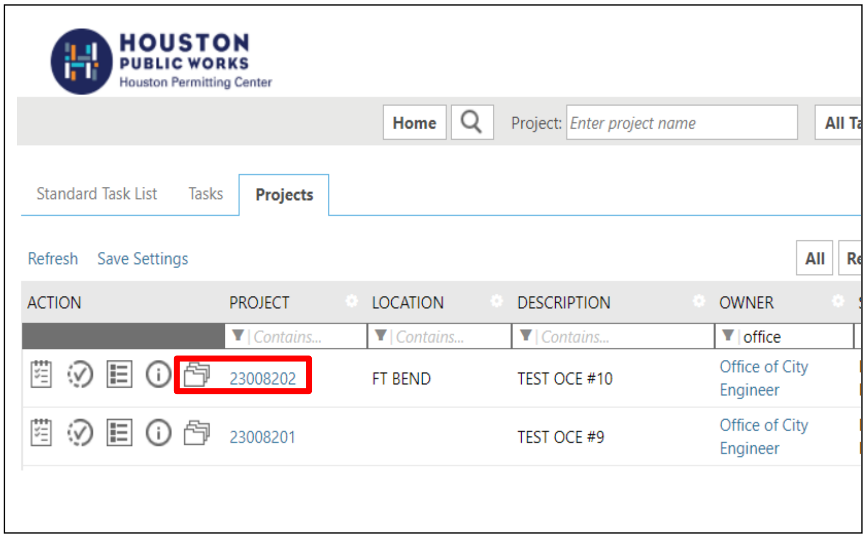
Files are securely managed through a pre-defined folder structure, which is listed below. Users cannot rename or add folders to the structure.

All drawings should be uploaded as single page files (ex: 20 pages = 20 files) into the **Drawings** folder for each project. All documentation (any non-drawing files,
easements, availability letters, geo-technical reports, etc.) should be uploaded as multi- page files into the **Documents** folder.

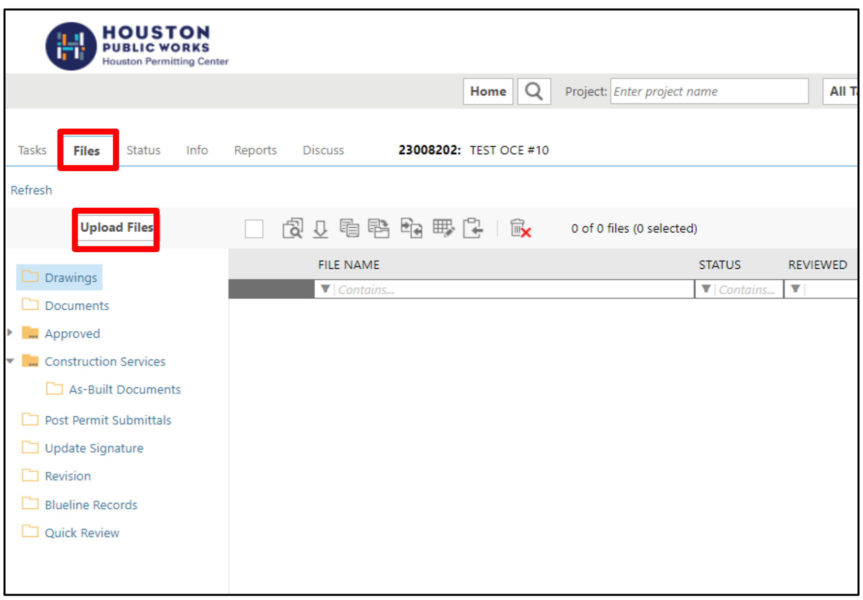
FOLDER	SHEET NO.	EXAMPLE
DRAWINGS	001-999	01-COVER
DOCUMENTS	001-999	NO STARD CONVENTION
POST PERMIT SUBMITTALS	001-999	01-PLAN AND PROFILE
UPDATE SIGNATURE	001-999	01-COVER
REVISION	001-999	01-COVER
BLUELINE RECORDS	001-999	FOR COH USE
QUICK REVIEW	001-999	FOR COH USE

Uploading Your Files

FIRST SUBMISSION TO THE CITY OF HOUSTON



On the **Home** page, under the **Projects** tab. Select the project number for which you want to upload files or click on the Files icon.



Select the name of the folder you want to upload into.

Click the ▶ icon to view any subfolders and click the ▼ icon to hide subfolders.

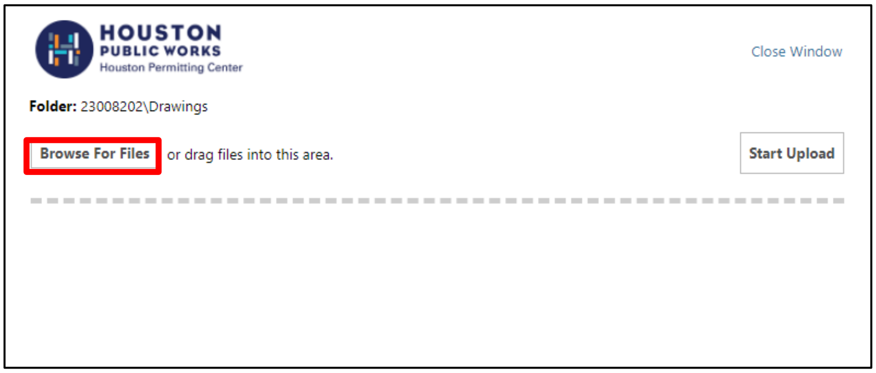
Click the **Upload Files** button.

A pop-up window will appear.

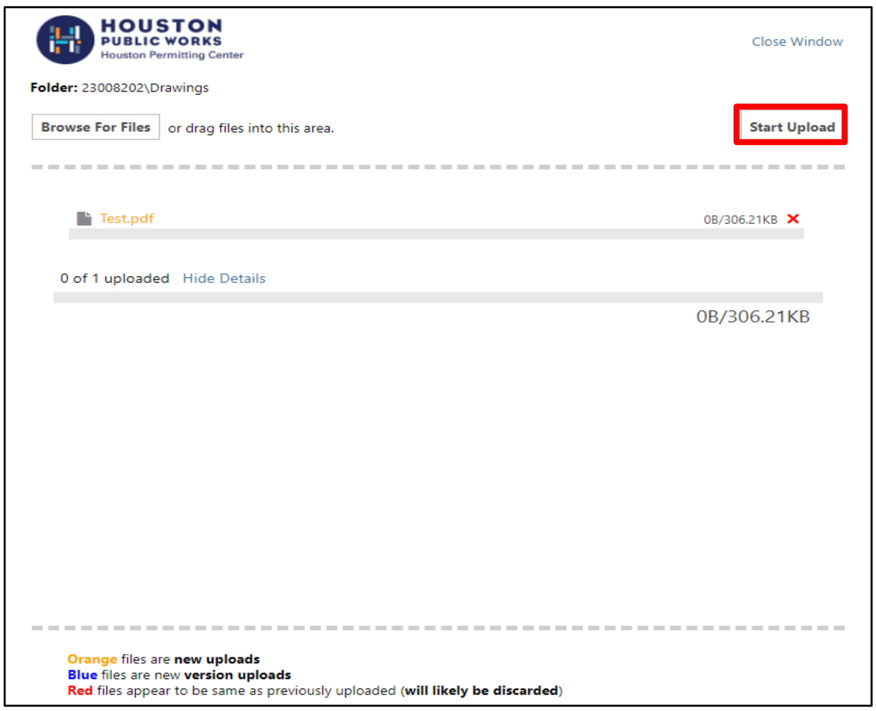
Uploading Your Files

FIRST SUBMISSION TO THE CITY OF HOUSTON

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

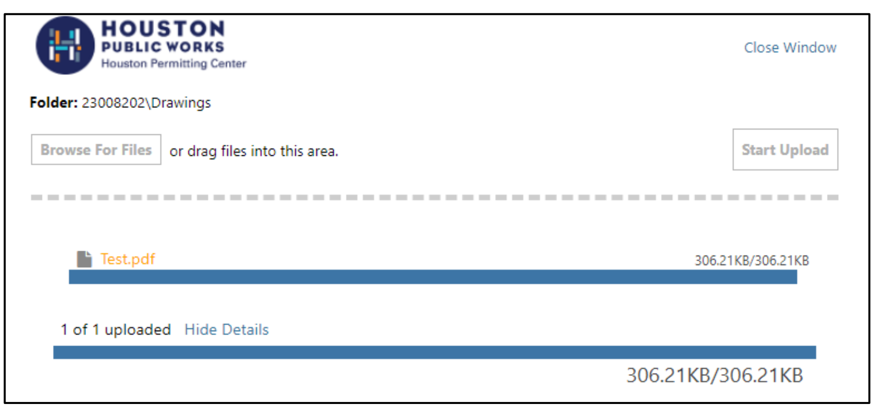


1. Select **Browse for Files** and navigate to the file or Drag & Drop your desired files.



2. Select the file and click Open.

3. Once all files have been selected or dragged, click the **Start Upload** button.



Uploading Your Files

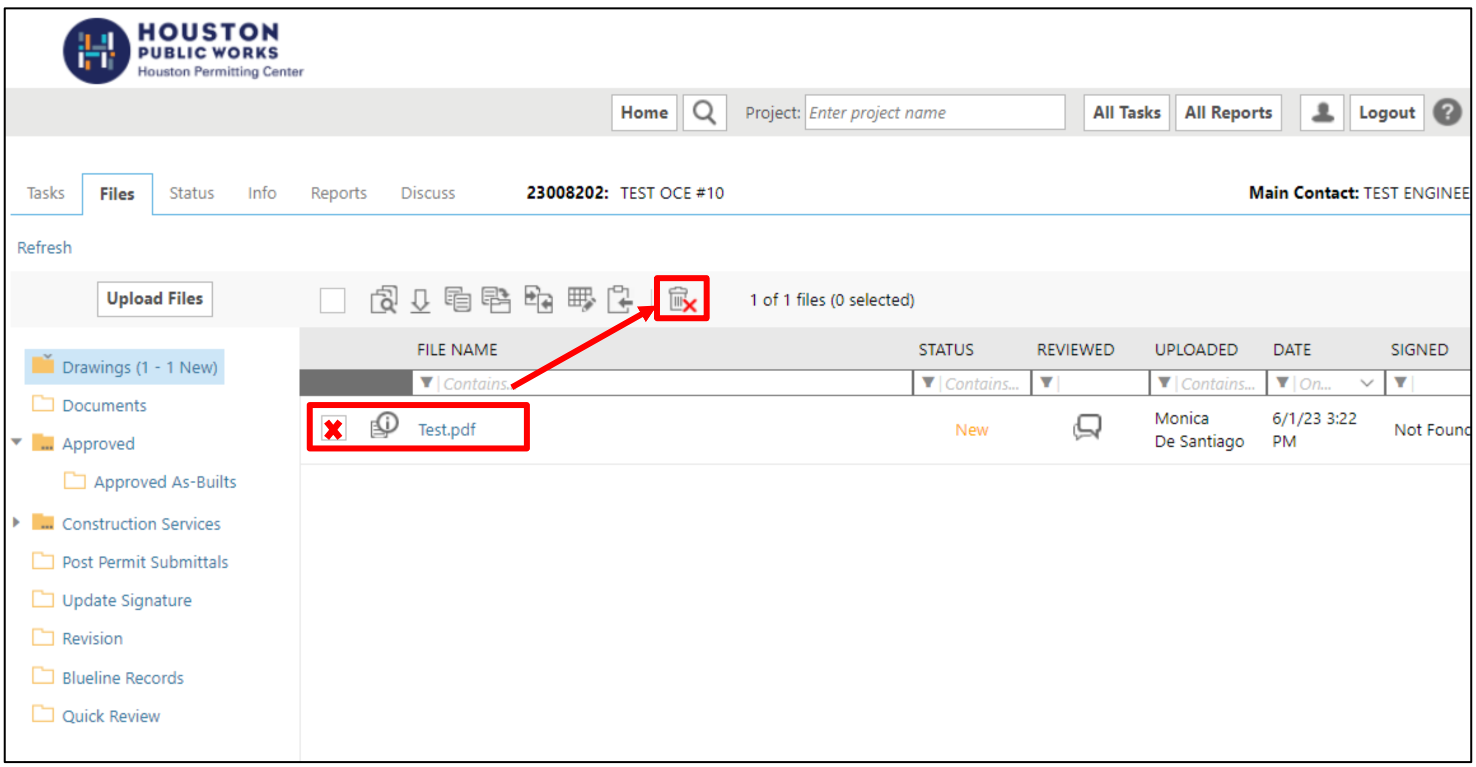
FIRST SUBMISSION TO THE CITY OF HOUSTON

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

If a file is uploaded into the wrong folder, select the specific file, then click on the delete button (red “X”). **The ability to delete files is only permitted on the first submission.**

Individuals invited into project will not have this ability and should contact the main applicant to delete files.

To upload files into another folder, select the designated folder on the left and repeat the process until all drawings and documents are uploaded to their respective folders.



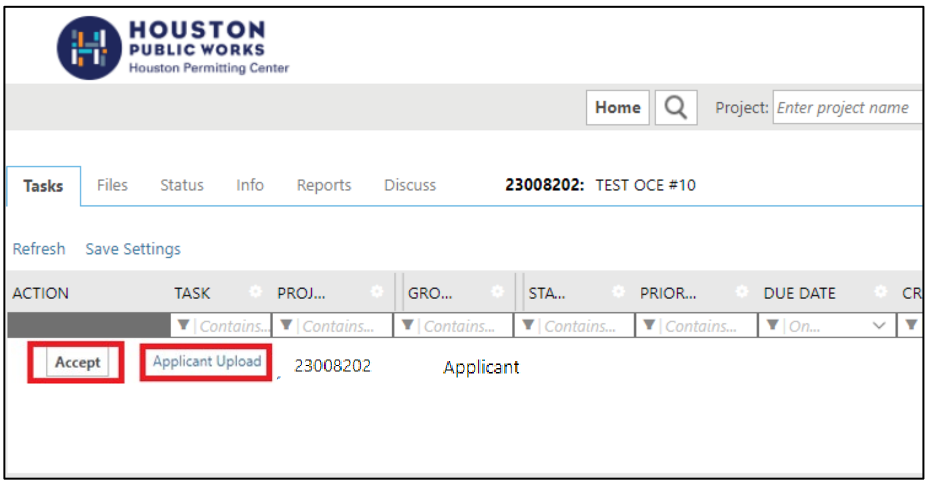
Complete Assigned Task

APPLICANT UPLOAD

ProjectDox moves a project through a series of tasks. Some of these tasks are attached to the applicant and others to the Office of the City Engineer's 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.

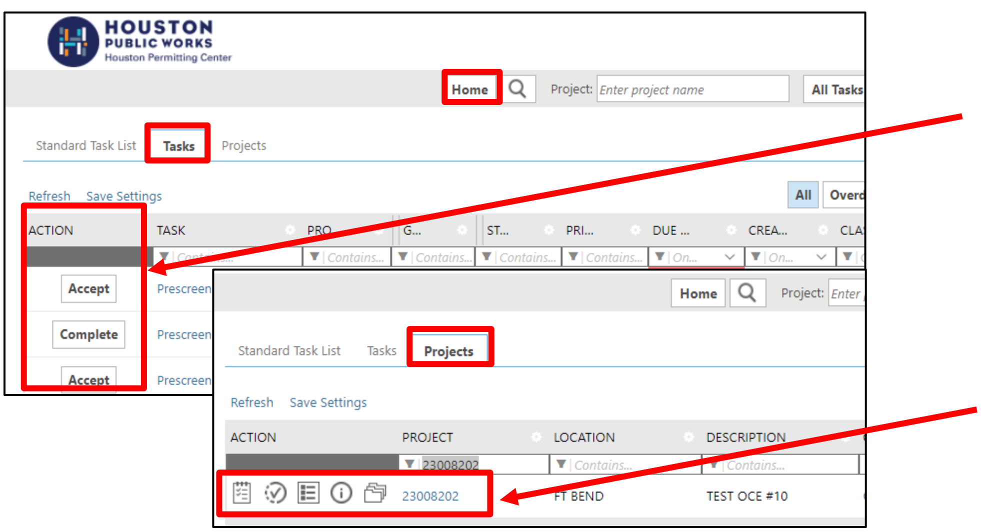
To notify the Office of the City Engineer that your plans are ready for the pre-screen review, the applicant **must complete** the assigned **Applicant Upload** task. The assigned task will show a status of *Pending* until you accept it.



From the project's main page, click on the **Tasks** button to display the assigned task.

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

The eForm will pop-up in a separate window.

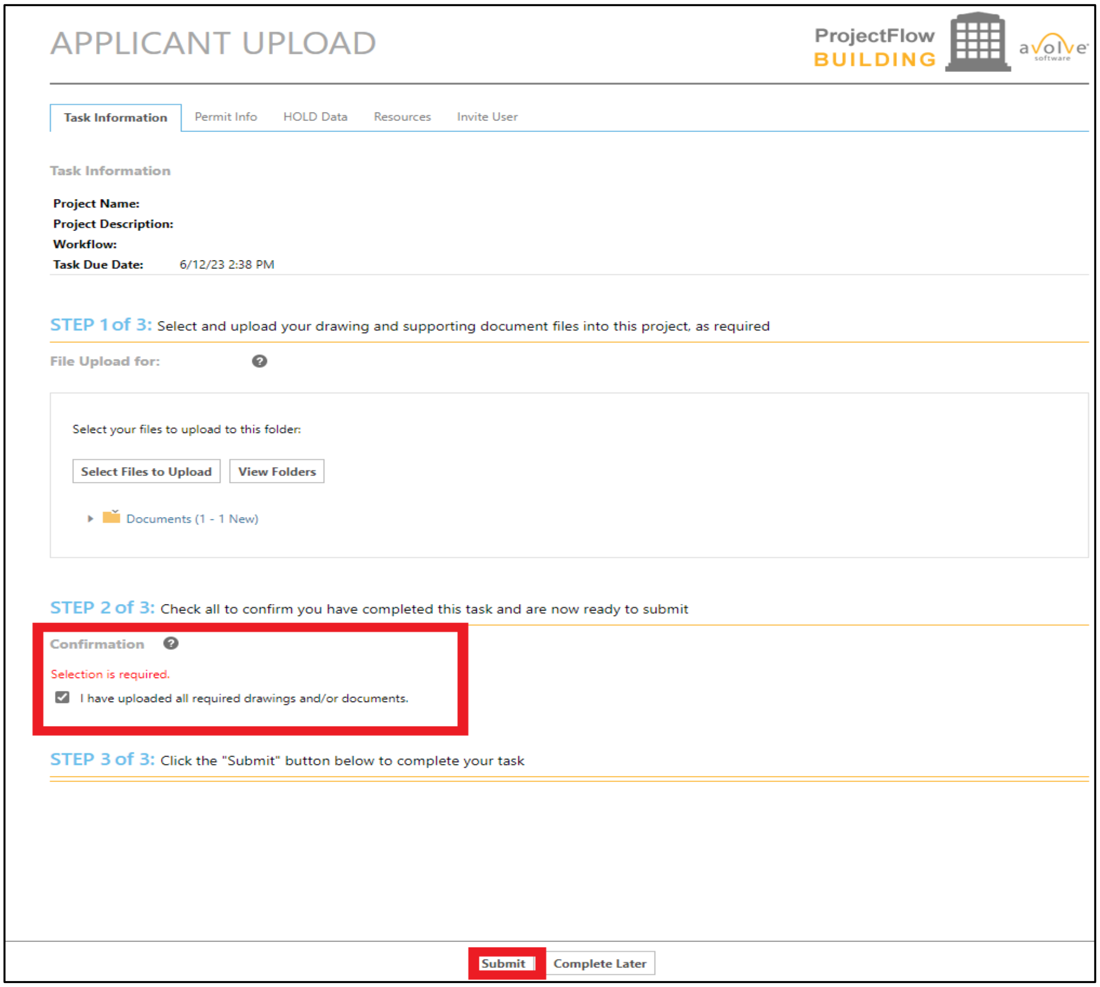


Alternatively, tasks can be accessed via the **Task tab** on the Homepage. Under the **Action** column, select the **Accept** link for the corresponding project.

Tasks can also be accessed by using the **quick action icons** under the **Projects** Tab.

Complete Assigned Task

APPLICANT UPLOAD



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

Invited users will have the same abilities as the applicant.

If you are not ready to complete the task, click on the **Complete Later** button. The eForm will close and the task will remain in your *Active Task List*.

If you are ready to complete the task, click on the **Submit** button. All required drawings and documents should be uploaded prior to selecting this button. Once this button is clicked, permission to upload into the project is removed until the City requests additional information.

Pre-Screen Review

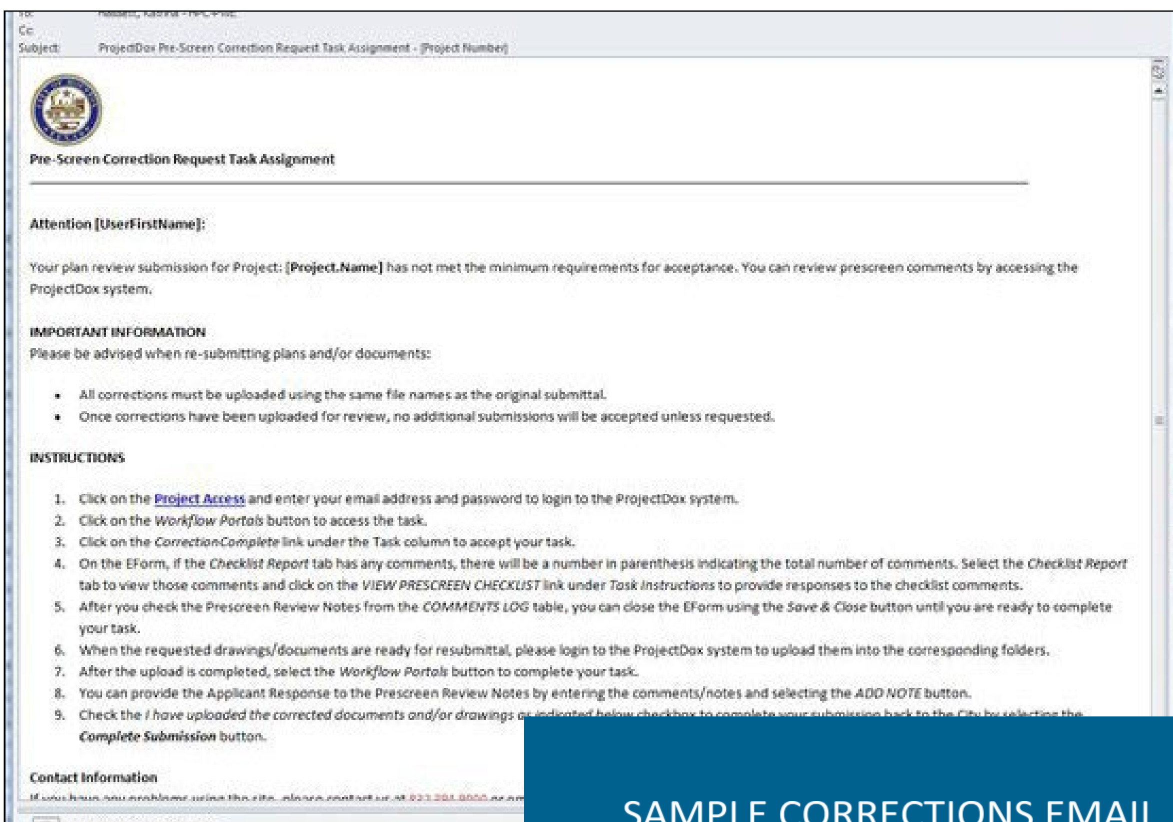
PROCESS OVERVIEW

During the pre-screen review, the Intake group will review the uploaded files for completeness and compliance with the standards.

If you have met the submittal requirements, the Intake group assigns the formal review to all required disciplines.

If items are missing or corrections are required, a **Correction Complete** task notification will be emailed to you with instructions on how to resubmit to fix the issues. Please login to ProjectDox system to review the information about the submittal issues from the Intake group.

Design team members invited into the project will also receive the email notifications and they would be able to upload the drawings and documents.



Cc

Subject: ProjectDox Pre-Screen Correction Request Task Assignment - [Project Number]

Pre-Screen Correction Request Task Assignment

Attention [UserFirstName]:

Your plan review submission for Project: **[Project.Name]** has not met the minimum requirements for acceptance. You can review prescreen comments by accessing the ProjectDox system.

IMPORTANT INFORMATION

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

- All corrections must be uploaded using the same file names as the original submittal.
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested.

INSTRUCTIONS

1. Click on the Project Access and enter your email address and password to login to the ProjectDox system.
2. Click on the *Workflow Portals* button to access the task.
3. Click on the *CorrectionComplete* link under the Task column to accept your task.
4. On the EForm, if the *Checklist Report* tab has any comments, there will be a number in parenthesis indicating the total number of comments. Select the *Checklist Report* tab to view those comments and click on the *VIEW PRESCREEN CHECKLIST* link under *Task Instructions* to provide responses to the checklist comments.
5. After you check the Prescreen Review Notes from the *COMMENTS LOG* table, you can close the EForm using the *Save & Close* button until you are ready to complete your task.
6. When the requested drawings/documents are ready for resubmittal, please login to the ProjectDox system to upload them into the corresponding folders.
7. After the upload is completed, select the *Workflow Portals* button to complete your task.
8. You can provide the Applicant Response to the Prescreen Review Notes by entering the comments/notes and selecting the *ADD NOTE* button.
9. Check the *I have uploaded the corrected documents and/or drawings* ... *Complete Submission* button.

Contact Information

SAMPLE CORRECTIONS EMAIL

Pre-Screen Review
CORRECTION COMPLETE TASK

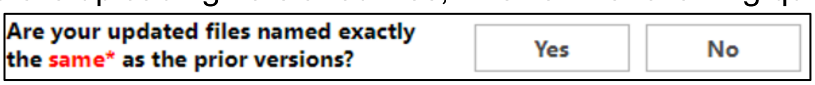
The following steps outline how to review the comments, submit corrections, and complete the assigned **Prescreen Resubmit** task:

1. Select the **Project Access** link in the email to login to ProjectDox.

2. Click on **Accept** or Select the **Prescreen Resubmit Task** link for the appropriate project from **Task** tab on the home page or from within the project.

3. The eForm will pop-up in a new window. Click on **Review Comments**. In this section, the Applicant may view and respond to the required corrections.

4. Upload Versioned or New files as needed, to the appropriate folders. Revised files must be uploaded using the same name as the original file to allow for automated file versioning.
    a) **Versioned Files** - New version of a file previously submitted.
    b) If you are uploading versioned files, Answer the following question…

    c) If **Yes**, follow the same procedures as the initial upload. ProjectDox will rename the file upon upload as a version of the original file.
    d) If **No**, select the file that will be a new version of the existing file. Upon upload ProjectDox will rename the file for you with the same name.
    e) **New Files** - New file, not previously uploaded and submitted.

5. You can invite the Design team into the project from the **Invite to Design Team** section

6. Respond to the Prescreen Review Comments on the **Reviews** tab by entering the comments in the text box.

7. On your eForm, select the check box ***"Response has been provided for all comments and files have been uploaded (if requested)"***

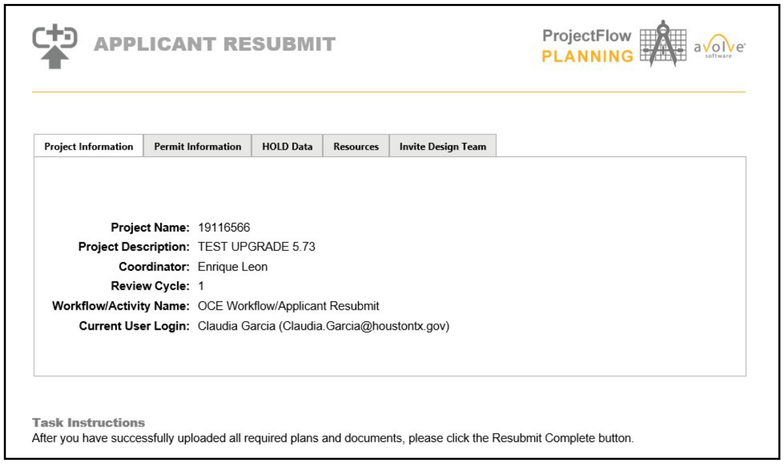
8. Select the **Submit** button.

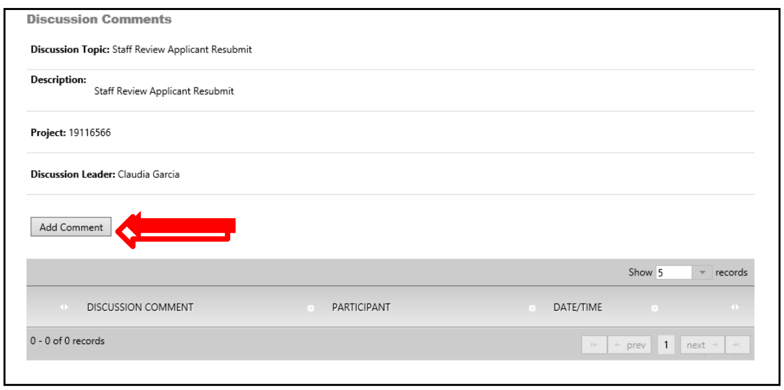
The **Prescreen Resubmit Task** is now complete, and your project status will change from *Prescreen Resubmit* to *Prescreen Review*.

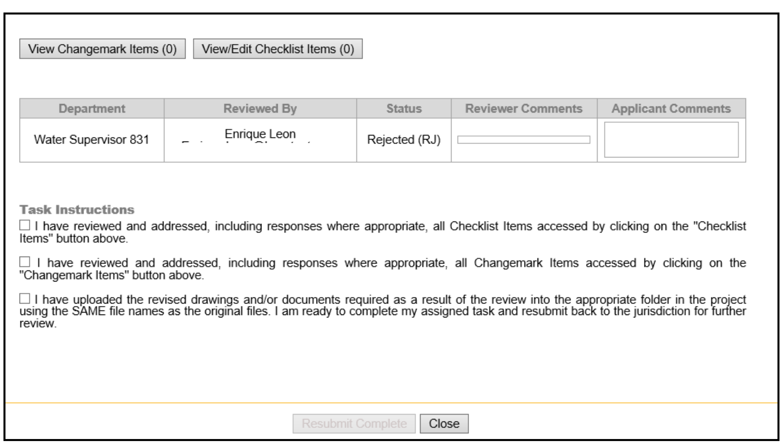
An Email notification is sent to the Intake group to perform the prescreen review again. If no additional information is required, the Intake group approves the prescreen review and your project will move onto the formal review. If more corrections are required, the *Prescreen Resubmit Task* will repeat.

Pre-Screen Review

CORRECTION COMPLETE TASK



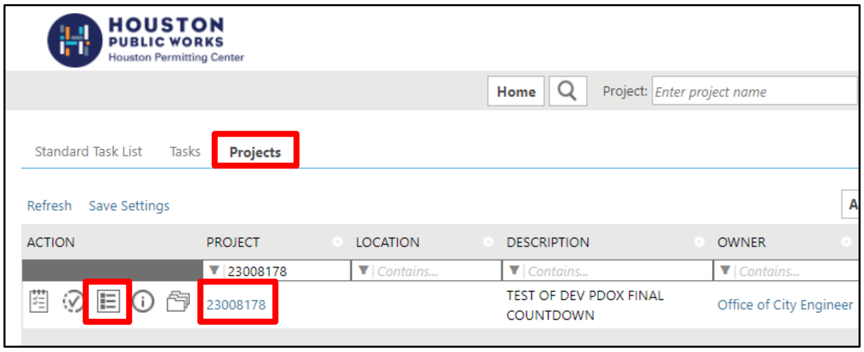


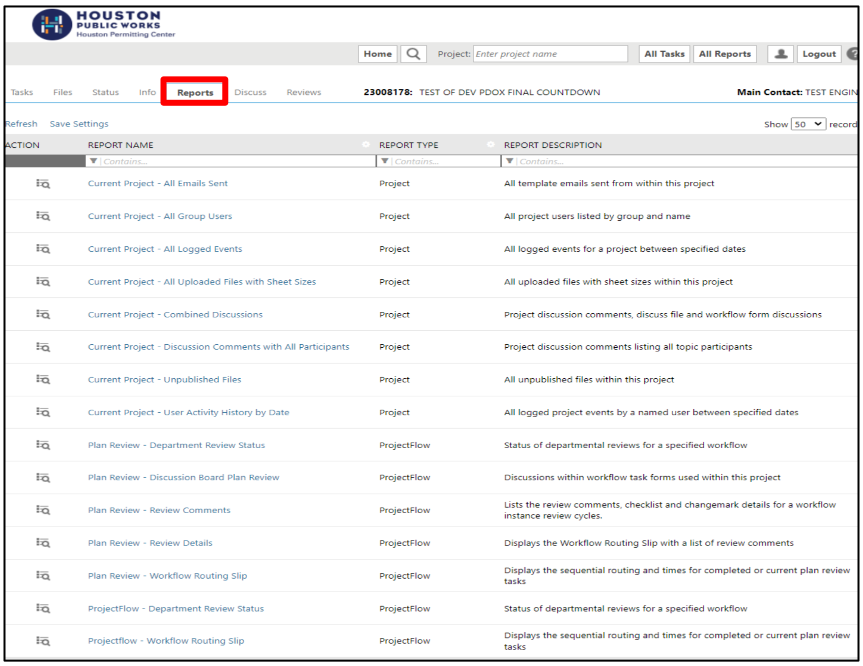


Note:
If new sheets are needed to be inserted/uploaded and renumbering the existing sheets is a must, you may:

- Number the sheets with a #.1, #.2, #.3, etc.… or #A, #B, #C, etc.…
- Insert the renumbered file names and write a note on your comment box in Eform stating "sheets have been renumbered and sheets from previous sheets need to be moved."

HOW TO RUN REPORTS IN PROJECTDOX



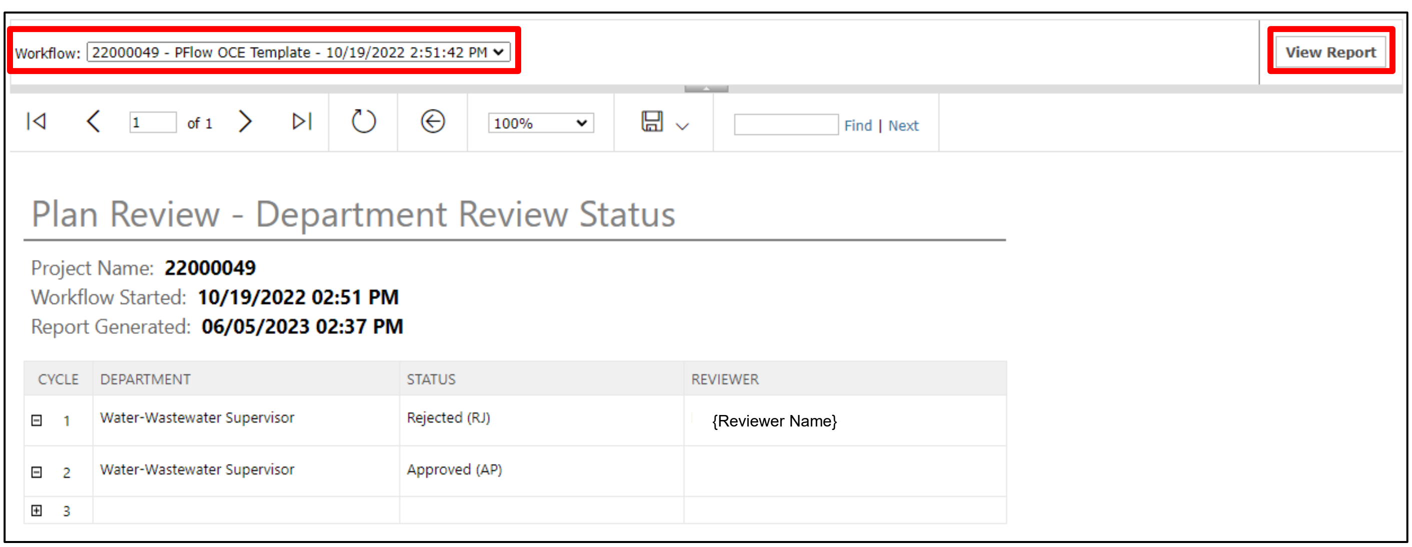


STEP 1
Log in to ProjectDox account and select the **Project** number or the **Projects Report** icon to run a report.

STEP 2
On **Reports** Tab. Select the magnifying glass or the report link fort the report you wish to run. Select the available template form the **Workflow** drop down menu and then click **View Report**.

The most common reports you would want to run are:

- Department Review Status
- Workflow Routing Slip



Review of Plans

APPROVED OR CORRECTIONS NECESSARY

Each assigned discipline will approve or reject their review by selecting the status **COMPLETED (AP)** or **CORRECTIONS NECESSARY (RJ).** When corrections are requested, the Engineer may add checklist comments, general comments, and changemark comments to the drawings to specify the plan deficiencies.

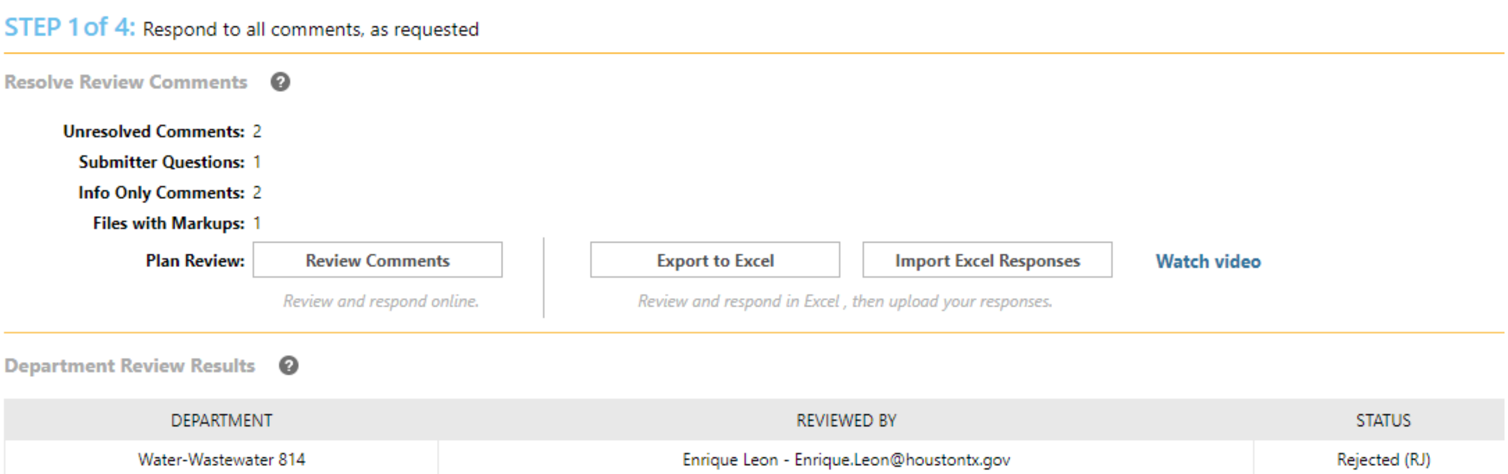
Note: **Assign Only** and **Not Applicable** are also possible statuses, assign only is for Supervisors assigning your project to a reviewer and Not Applicable stating that their department is not required to review your plan.

Once all assigned disciplines have completed their review, ProjectDox system notifies the applicant and/or design team whether the plan review is approved, or corrections are requested.

If all reviews have been approved, the Plan Review Admin member will apply the final Office of the City Engineer approval stamp to all the drawings. If payment is pending, the applicant will receive an **Approved—Pending Payment** email with instructions. When there is no payment due, the applicant will receive the **Approved Plans Ready for Download** email.

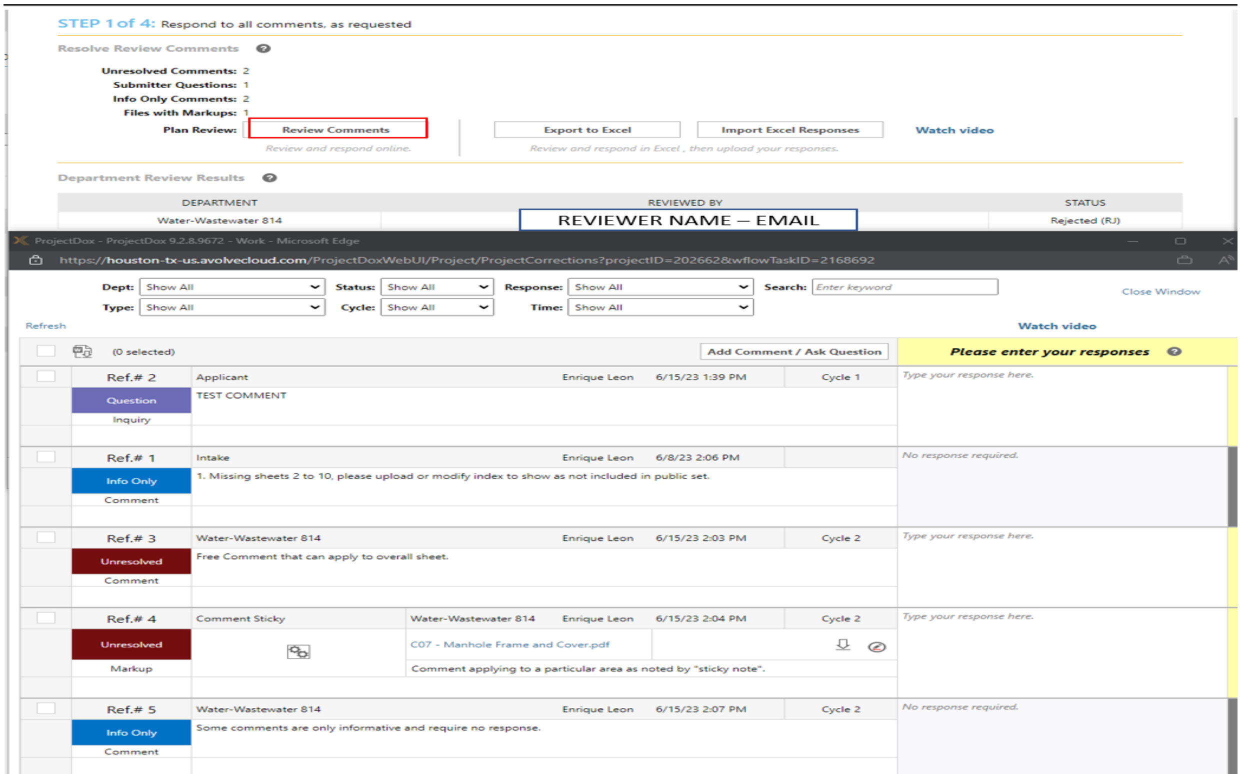
If at least one engineer has selected the **Corrections Necessary (RJ)** status, the applicant will receive an email notification of the **Applicant Resubmit** task with instructions on how to resubmit to fix the issues.

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



Review of Plans

APPLICANT RESUBMIT TASK



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

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit Task** link from the *Tasks Section* on the homepage or from within the project.
3. Select **OK** to accept responsibility for completing the task.
4. The eForm will open.
5. If the engineers have added any markups to your drawings/documents, you can view the markups clicking the **Review Comments** button to open the comments viewer.

- To view a specific markup in full size, click on the link within the markup.
- Provide a response to each markup in the Applicant Response column.
- Note that comments can be marked as resolved or information only requiring no response.

6. You can view department status (approved/rejected/not applicable/assign only) under the **Department Review Results** section.
7. When all comments have been addressed, upload the revised drawings/documents into the appropriate folders using the <u>original file</u> name<u>(s)</u>.
8. You can also export the comments to excel, answer in the correct box (making no changes to the rest of the excel sheet) and re-upload to automatically fill comment responses.
9. Check the 2 acknowledgement check boxes under the Task Instructions and click on the **Submit** button to complete your task. *Note: The Office of City Engineer will not receive your revised plans if this task is not completed.*

An email notification will be sent to the Intake group assigning them to the step *Resubmit Received*. The Intake group will confirm that plans have been uploaded and the proper disciplines are assigned for the next review cycle. If any one of the disciplines rejects the review, the **Applicant Resubmit** step will be repeated until all the departments approve.

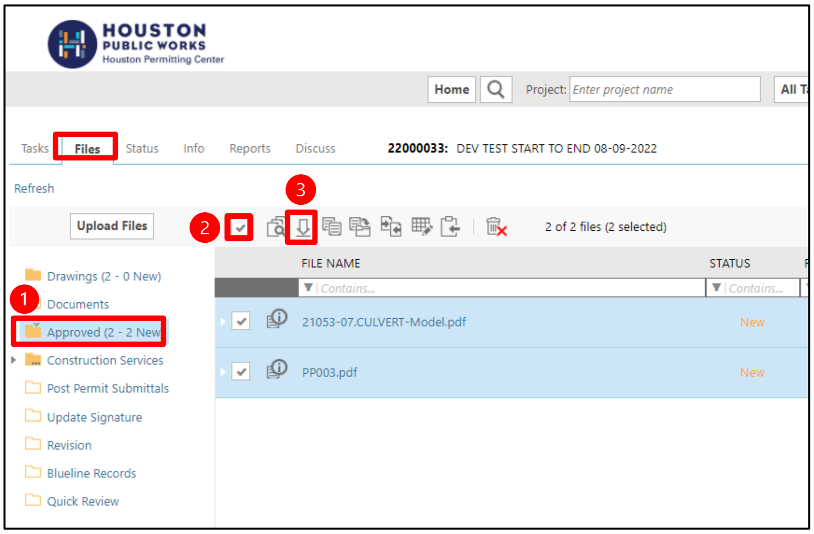
Note: If new sheets are needed to be inserted/uploaded and renumbering existing sheets is a must, you may:

- Number the sheets with a #1, #2. #3, etc.… or #A, #B, #C, etc.… to insert without renumbering.
- Insert the renumbered file names and write a note on your comment box in eForm stating “sheets have been renumbered and sheets from previous sheets need to be moved.”

Download and Print

APPROVED PLAN SET

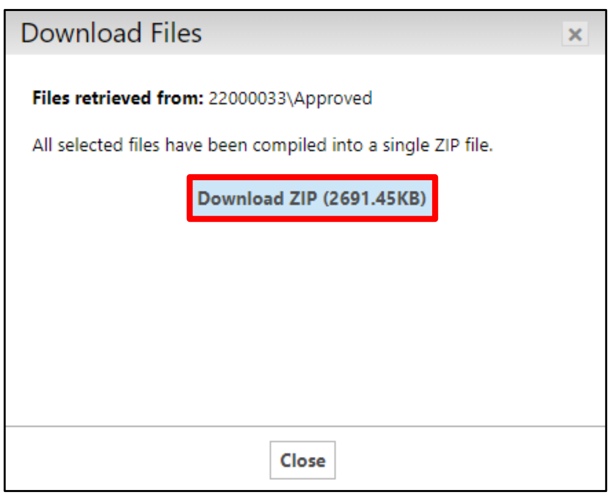
After the payment is made in iPermits system, you will receive an Approved Plans Ready for Download email indicating that you may login to ProjectDox and download your approved plans in the folder marked **Approved**.



On the **Files** tab, select the **Approved** Folder.

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** button to continue. Select Save or Save As in the pop- up window.

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

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Each page of the approved plan set will be stamped with the Office of the City Engineer drawing number stamp on the bottom right corner.

Revisions

PROCESS OVERVIEW

The process for revision is as follows:

1. Email OCE@houstontx.gov with the request to re-open 'project number' for revision. At this time, if the applicant has changed within the same company, the new applicant email should be provided to be updated.
2. OCE will review request.
3. If eligible for revision OCE will re-open the project.
4. Cover sheet of revised project will have revision note calling out revision number, revision summary
5. Customer to upload cover sheet and revised sheets only to the "REVISION FOLDER".
6. Complete submittal task.

The revision plan review follows the same process as the original plan review submittal once the workflow is started.

Revisions

PROCESS OVERVIEW

1. Email OCE@houstontx.gov the request for revision, project number, and if the applicant has changed.
2. OCE Plan Review Admin will review revision request and if approved will re-open project for revision.
3. Upload cover sheet and revised sheets only to revision folder.
4. Cover sheet must have revision callout including revision number, short description, revised sheets and dated and initialed by Engineer of Record (EOR).
5. Revised sheets must include revision note initialed and dated by EOR.

Complete task, process will follow standard submittal procedures.

Office of City Engineer charges the same submittal fee for revisions. The revision fee will be collected after the plan review is approved.

Update Signatures

PROCESS OVERVIEW

When updated signatures are required for a project already approved in ProjectDox, the applicant can email OCE@houstontx.gov to request the project be re-opened.

After the Intake group reviews the update signatures request, they will start the workflow within the project. The applicants will be sent an email notification to upload the update plans into the ***Update Signature*** **folder** for the project.

For Inside City Limits projects:

1. Signatures need to be updated from the private utility companies.
2. The PE needs to write note on the cover sheet stating 'No design or topographic changes to approved plans', and sign and date the note.

For Outside City Limits projects:

1. No Utilities signatures needed.
2. The PE needs write note on the cover sheet stating 'No design or topographic chanes to approved plans', and sign and date the note.

POST PERMIT SUBMITTALS (For **Floodplain Management Office):**
After the project is approved, the inspection team may upload the inspection reports and as-built documents into the **Post Permit Submittals** folder of the project. The Flood Plain Supervisor will be notified when there are new files in this folder.

CONSTRUCTION SERVICES
If there are no changes in the field, download the cover sheet and have the contractor sign As-Built (The engineer can sign the Record Drawing) and upload it into the **As-Built** sub- folder under the *Construction Services* folder. Assigned inspector will need to approve any as-builts in field.

If there are changes in the field, please follow the below steps:

1. Download the approved drawing which requires changes *(Note: changes must be pre-approved and must meet IDM requirements.)*
2. Show the as-built condition accurately on the drawing and cloud the area.
3. Have the Engineer of Record and the Contractor sign the drawing and upload the drawing into the **As-Built** folder.
4. Repeat the process for all the required drawings
5. Make a revision note on cover sheet and have the Engineer of Record sign it.

Contact the assigned Inspector or Construction Services section at 832.394.9097 if you have any questions.

Thanks for using electronic plan review!

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

HOUSTON
PUBLIC WORKS
Houston Permitting Center

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www.houstonpermittingcenter.org