



**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

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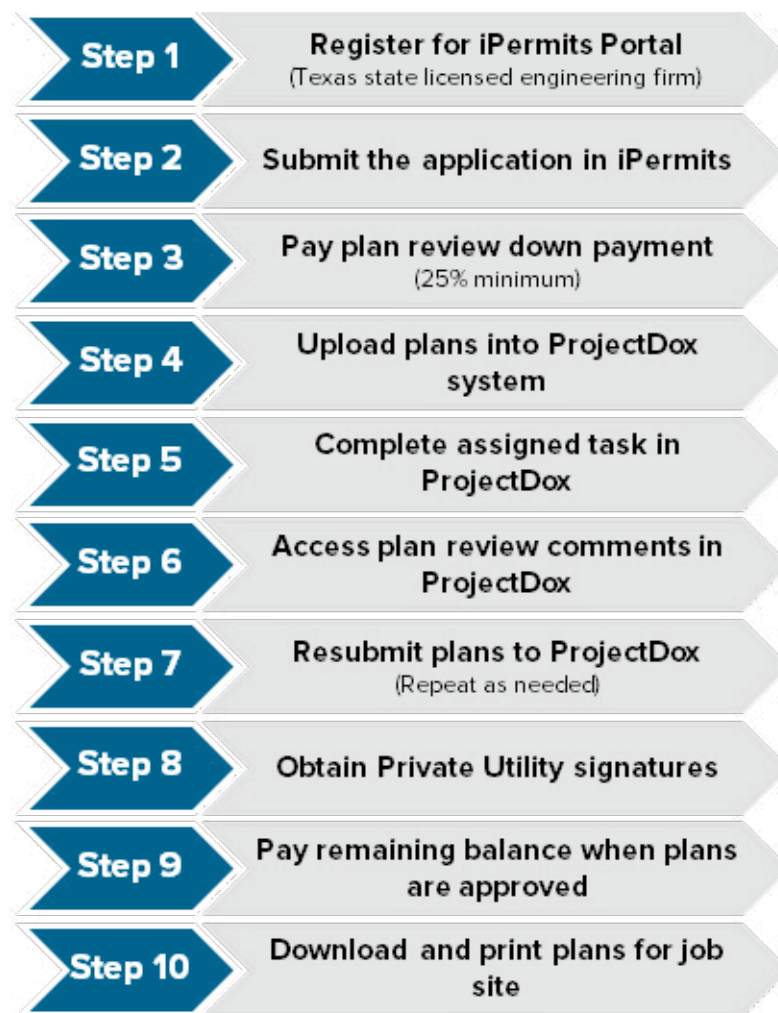
# Overview

## 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 used to upload drawings, receive comments, and receive approvals.



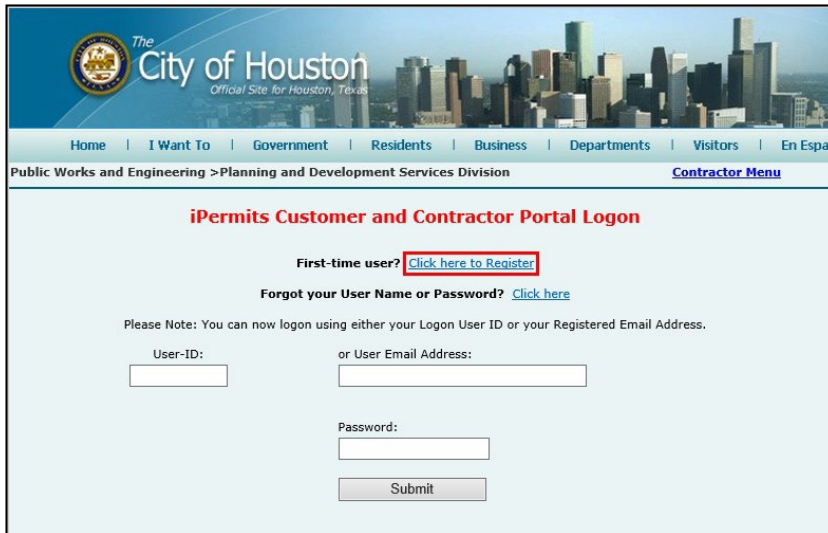
# iPermits Registration

## 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 registered 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@houston.tx.gov](mailto:oce@houston.tx.gov)



# iPermits Registration

## STEP 2: CREATING A SECURITY ADMINISTRATOR USER PROFILE

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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 trying to establish a web presents to purchase mechanical permits 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:

Entity Name Type: ☐ Individual ☒ Corporation or Firm

Corporation or Firm:

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

City:  State:  Zip:

Firm Name:

Phone Number:  Phone Number:  numeric digits only

Email Address:

#### License Information

The Engineering firm number shown above is not currently registered in the City of Houston's iPermits database. If you are not the Licensee, please consult with your management team and obtain their approval before proceeding.

By default you will be added as a security administrator for . By proceeding you are acknowledging that you are an authorized administrator.

iPermits PIN:  PIN Confirmation:

#### User Information

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.

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

**Note: the first person to register a firm will become the security administrator and sets the master PIN.** 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 screenshot shows the 'Create an Engineering Firm related User Profile' page on the City of Houston iPermits website. The page includes a header with the City of Houston logo and navigation links. A yellow warning box contains important instructions for users. The form is divided into several sections: 'Engineering Firm Name Information' with fields for License No., License Type (ENG), Entity Name Type (Individual or Corporation or Firm), Corporation or Firm name, Mailing Address (House #, Fraction, Pre-Dir, Street Name, Type, Space, City, State, Zip), Firm Name, Phone Number, and Email Address; 'License Information' with fields for iPermits PIN and a PIN Override checkbox; and 'User Information' with fields for Security Level (This is my license or The user being added is a staff member), User ID, Password, Confirm, Email Address, First Name, Middle, Last, Mailing Address (City, State, Zip), Company Name, Phone Number, and Fax Number. At the bottom, there is a declaration section with a checkbox for affirming the declaration and a 'Submit Add' button.

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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 #  Fraction  Pre-Dir  Street Name  Type  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.

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

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Public Works and Engineering > Planning and Development Services Division

### iPermits Online Service Menu

User Profile Building Permit Applications

You are: **PROJECTD** Office of the City Engineer Plan Review Application

[Edit User Profile](#)

[User Document Catalog](#)

**[Corporate User Roster](#)**

[Licensees Associate with your User-ID](#)

Select the desired Customer

- Use this entry for sales-orders that do not require a License

Purchase a Trade Permit

Review Your Recent Shopping Cart Entries

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.

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

### iPermits Corporate User Management

This page allows you to manage the iPermit Users associated with your company

Company: **TEST ENGINEER** Refresh List Company Maintenance

| User-ID  | User Name                           | Branch | Security Administrator |
|----------|-------------------------------------|--------|------------------------|
| ENGINE01 | PERMITS ENGINEER TEST               | MAIN   | Yes                    |
| ENGINE02 | HOOPER ROBERT F                     | MAIN   |                        |
| ENGINE03 | ADMINISTRATOR TEST                  | MAIN   |                        |
| KATIE    | KATRINA <b>(Pending Activation)</b> | MAIN   |                        |

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).

**Corporate Information**

Company ID:

Company Name:

Company Address:

City:  State:  Zip:

Main Phone Number:  Branch Name:  Delete Company Relationship

**User Information**

User ID:  User Status:  Corporate Security Administrator ☐

Email Address:

First Name:  Middle:  Last:

Phone Number:  Fax Number:

Mailing Address:

City:  State:  Zip:

| License Number | License Type | Licensee Name | License Status           | Allow User Access                   |
|----------------|--------------|---------------|--------------------------|-------------------------------------|
| 12345678       | ENG          | TEST ENGINEER | License in good standing | <input checked="" type="checkbox"/> |

Update Profile

Grant User Access To Additional Licenses Numbers



# 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”.

The screenshot shows the City of Houston iPermits Online Service Menu. The 'Edit User Profile' link is highlighted with a red box and a red circle with the number 1. The menu includes options for User Profile, Building Permit Applications, Office of the City Engineer Plan Review Application, and User Document Catalog. A dropdown menu for 'Select the desired Customer' is also visible.

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

The screenshot shows the 'iPermits - Manage Authorized Users List (For Licensees' Use Only)' page. The 'Refresh User List' button is highlighted with a red box and a red circle with the number 2. The page includes instructions for reviewing and adding users, and a section for entering licensee information with fields for License No., Type, and Web Portal PIN.

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

The screenshot shows the 'Edit User Profile' page. The 'Grant User Access To Additional Licenses Numbers' button is highlighted with a red box and a red circle with the number 3. The page includes a note about required fields, user information, mailing address, password change, and company affiliation maintenance.

# 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.

The screenshot shows the 'iPermits - Manage Authorized Users List (For Licensees' Use Only)' page. It includes a yellow box with instructions for reviewing, adding, and removing users. Below this, there are sections for 'Enter licensee's Information' and 'iPermits User's information (to authorize additional users, complete and submit this section)'. The 'iPermits User's information' section contains fields for User ID, Name, Email, and Security Level, along with a dropdown for Authorized Signatures and a 'Link and Authorize this User' button.

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

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

This close-up shows the 'Security Level' section. The first radio button, 'Grant this user unrestricted access to this license', is selected. The second radio button is 'Link this user's access rights to the following authorized signature entry'. Below these is a dropdown menu for 'Authorized Signatures' which currently shows 'No pending authorized signatures'. At the bottom, the 'Link and Authorize this User' button is highlighted with a red box.

**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.

**iPermits Online Service Menu**

User Profile  
You are: **OCE001**  
[Edit User Profile](#)  
[User Document Catalog](#)  
**[Corporate User Roster](#)**  
[Licensees Associate with your User-ID](#)  
[Users Associated with a License](#)  
[Companies Associated with a License](#)

Select the desired Customer  
- Use this entry for sales-orders that do not require a License

- Purchase a Trade Permit
- Review Your Recent Shopping Cart Entries
- User Project Management - List Maintenance
- Pay for a Houston Permitting Center shopping cart
- Make an Advanced Payment Account Deposit

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

**iPermits Corporate User Management**  
This page allows you to manage the iPermit Users associated with your company

Company: **OFFICE OF THE CITY ENGINEER**

| User-ID        | User Name               | Branch | Security Administrator |
|----------------|-------------------------|--------|------------------------|
| OCE001         | ENGINEER OFFICE OF CITY | MAIN   | Yes                    |
| <b>SHOCKEM</b> | WIRE SHOCK THEM         | MAIN   | Yes                    |

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

**Associated Licenses and Accounts**

| License Number | License Type | Licensee Name               | License Status           | Allow User Access                   |
|----------------|--------------|-----------------------------|--------------------------|-------------------------------------|
| 01234567       | ENO          | OFFICE OF THE CITY ENGINEER | License in good standing | <input checked="" type="checkbox"/> |

- 4) Then select “Update Profile”

**User Information**

User ID: **SHOCKEM** User Status: **Active** ☒ Corporate Security Administrator

Email Address:

First Name: **SHOCK** Middle: **THEM** Last: **WIRE**

Phone Number:  Fax Number:

Mailing Address:

City: **HOUSTON** State: **TX** Zip: **77002**

**Associated Licenses and Accounts**

| License Number | License Type | Licensee Name               | License Status           | Allow User Access        |
|----------------|--------------|-----------------------------|--------------------------|--------------------------|
| 01234567       | ENO          | OFFICE OF THE CITY ENGINEER | License in good standing | <input type="checkbox"/> |

- 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

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>Planning and Development Services Division [Contr](#)

### iPermits Online Service Menu

Building Permit Applications

**Office of the City Engineer Plan Review Application**

Select the desired Customer

- Use this entry for sales-orders that do not require a License ▼

Purchase a Trade Permit

Review Your Recent Shopping Cart Entries

User Project Management - List Maintenance

Pay for a Houston Permitting Center shopping cart

Make an Advanced Payment Account Deposit

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.

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

### Office of the City Engineer Plan Review Applications

This page allows you to view OCE Plan Review applications that are attached to your user profile. Select the date range that you would like to search. If no date range is selected the search will default to the last year's activity.

**OCE Plan Review Applications**

**Begin New Application**

Dates from 12/27/2018 thru 12/27/2019

| Application Number | Date       | Owner Name | Status                         | ILMS Project No | Epay Number |
|--------------------|------------|------------|--------------------------------|-----------------|-------------|
| 00058955           | 12/02/2019 |            | Pending Payment                |                 | 02218057    |
| 00055037           | 09/25/2019 |            | Application never finalized    |                 |             |
| 00020846           | 01/04/2018 |            | Plan Review Log Number: 180011 | 18001214        |             |
| 00020815           | 01/03/2018 |            | Plan Review Log Number: 180006 | 18000581        |             |
| 00020811           | 01/03/2018 |            | Pending Payment                |                 | 01653068    |
| 00020810           | 01/03/2018 |            | Pending Payment                |                 | 01653064    |

[Back](#)

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

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

### Office of the City Engineer Application for Plan Review

Required under the Authority of the City of Houston, Ordinance No. 83-650  
Please Note: Submittal of false information will result in invalidation of the application.

**Please read the following information before proceeding**

- Fields marked with "\*" are required.
- The specified number of sheets must be accurate or the application may not be accepted

The following plans drawing types can be submitted through the OCE application process:

- Utilities construction projects in the right-of-way and/or within the easement.
- Any projects in the city right-of-way and/or within the easement tie-in to public utilities.
- Any projects in the city right-of-way and/or easement, or any projects connecting to public utilities whether inside the City of Houston or in City Extra Territorial Jurisdiction (ETJ), any projects except Capital Improvement Projects (CIP) in the city right-of-way, any public water plant, well, wastewater treatment plant, lift station or stormwater pumping station.
- Please note that any other plan type drawing submitted through the OCE process will be cancelled and applicant will have to request a refund with an approximate refund time of 8 weeks
- The following information is required for DAS applications, plans, and geographic information submittals:
- Select Digital Antenna System plan submission for DAS projects
- click link: [Application](#) for Wireless Facility, Ground Equipment, and/or Licensee Pole (use application to assist you in completing your GIS table)
- Plans must be submitted within 30 days (no refunds)
- Click link for: [GIS requirements](#)
- Submit any other required documents/information

**Application**

Click the following checkbox if submitting a Digital Antenna System (DAS) Project ☐

Please Describe the Proposed Development\*:

Number of Sheets\*:

☐ In FloodZone ☐ Trees In ROW

Key Map\*:

☐ Water Facility ☐ Wastewater Facility

County\* [Please Select](#) ☐ Inside City Limits ☐ Outside City Limits

**Applicant/Engineer Information**

Firm License/Type:  \*TEO, LLC

Mailing Address:

City:  State:  Zip: 77005

Contact\*:

Phone Number\*:  Phone Number:  numeric digits only

Email Address\*:

Engineer of Record\*:

Phone Number\*:  numeric digits only

Email Address\*:

**Owner Information**

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

Entity Name Type: Individual ☒ Corporation or Firm ☐ Applicant is Owner ☐

Last, First Middle:

Mailing Address:  Name:  Unit:

City:  State:  Zip:

Contact:

Phone Number:  Phone Number:  numeric digits only

Email Address:

[Save & Continue](#)

[Reset](#)

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.

Application Fee

Please Note:

As of January 1st 2017, the Office of the City Engineer plan check fee as been increased from \$79.67 per sheet to \$80.49 per sheet. Based on the above mentioned, 13 sheets, this application's plan check fee is \$1,092.65 plus a \$116.75 administration fee. At minimum a 25% down payment must be made prior to submitting the plans for review. Your options are as follows: Pay the 25% minimum, pay the full amount, or pay any amount greater than the 25% minimum; plus the \$116.75 administration fee.

☒ Generate a sales order based on a 25% down payment (\$273.16) plus the \$116.75 admin. fee

☐ Generate a sales order for the full amount (\$1,209.40)

☐ Generate a sales order for \$ .00  
(must be greater than 25% minimum plus the \$116.75 admin fee)

Save and Continue

Finalize Application

Reset



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

**iPermits Shopping Cart Maintenance**  
Sales Order Payment Selection

Create a New ILMS Shopping Cart

Shopping Cart No: 02242704 Return to Shopping Cart List Maintenance

Created: 12/03/2019

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

| Select Sales Orders for Payment |                  |             |             |   |                 |                   |                                     |
|---------------------------------|------------------|-------------|-------------|---|-----------------|-------------------|-------------------------------------|
| Sales Order                     | Type             | Date        | Holds Appvd | Customer / Contractor of Record (Permit emailed to)         | Update Required | Fee / Amount Paid | Select to Pay                       |
| 02398314                        | New Single Trade | 03-DEC-2019 | No Holds    | 8978-ENG TEO, LLC<br>teolc@gmail.com<br>CITY MASTER PROJECT |                 | \$200.80          | <input checked="" type="checkbox"/> |
| <b>Shopping Cart Amount Due</b> |                  |             |             |   |                 | <b>\$200.80</b>   |                                     |

Recalculate

View the payment transmittal

Make Online Payment via Credit Card or Electronic Check

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

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

**ILMS Shopping Cart Online Payment Processing**  
Payment Selection

Shopping Cart No: 02242704 Return to Shopping Cart Maintenance

Created: 12/03/2019

Payment Processed:

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

CC Holder Type: Individual ☐ Corporation or Firm ☒

Corporation or Firm: TEO, LLC

Billing Address: House # 5510 Fraction  Pre-Dir Street Name COMMUNITY Type Drive Space

Billing Zip Code: 77005 - 0000

**Shopping Cart Amount Due** 200.80

Update Payer Information

Continue the Credit Card/Electronic Check Payment Process

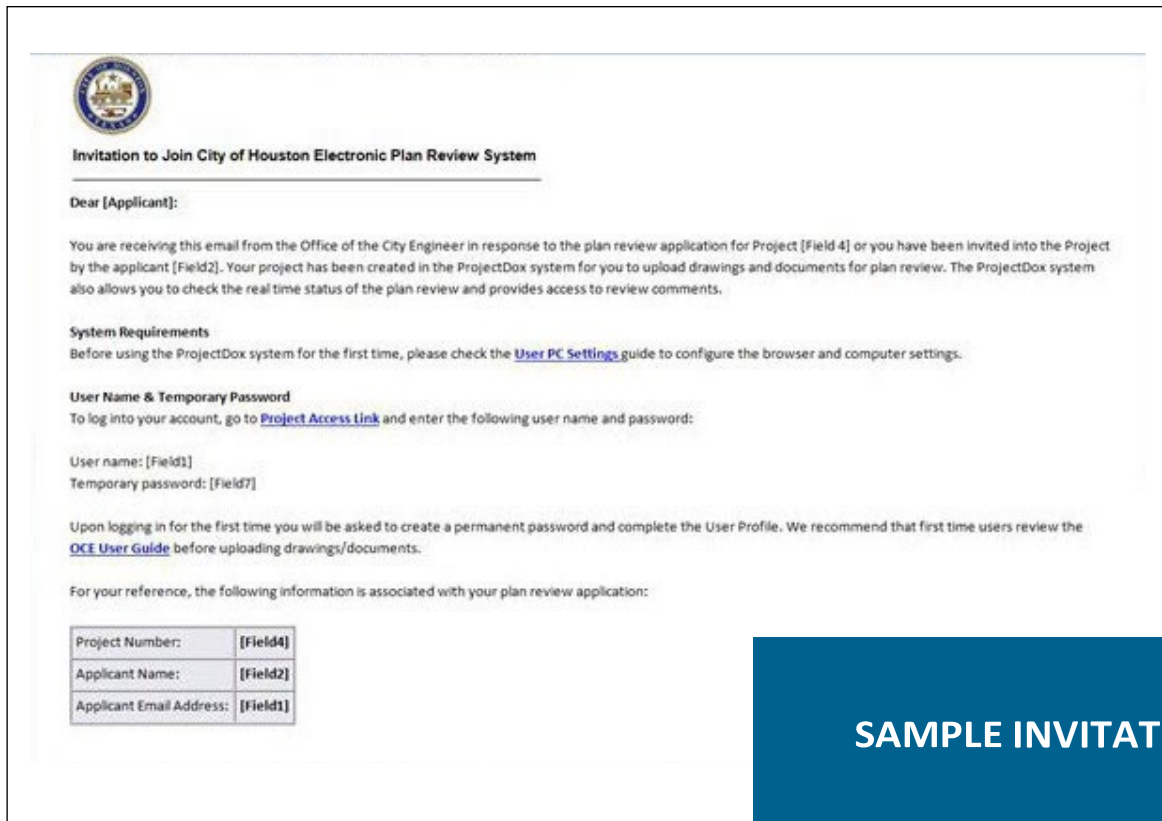
Please Note: Electronic Check payments cannot be submitted after 8:30 PM.

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



The image shows a sample invitation email template for the City of Houston Electronic Plan Review System. It includes a header with the City of Houston seal, a subject line, a salutation, a main body of text explaining the invitation, system requirements, user name and temporary password instructions, and a table of application details. A large blue box on the right side of the template contains the text 'SAMPLE INVITATION'.



**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 [Field 2]. 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: [Field 1]  
Temporary password: [Field 7]

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:          | [Field 4] |
| Applicant Name:          | [Field 2] |
| Applicant Email Address: | [Field 1] |

**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

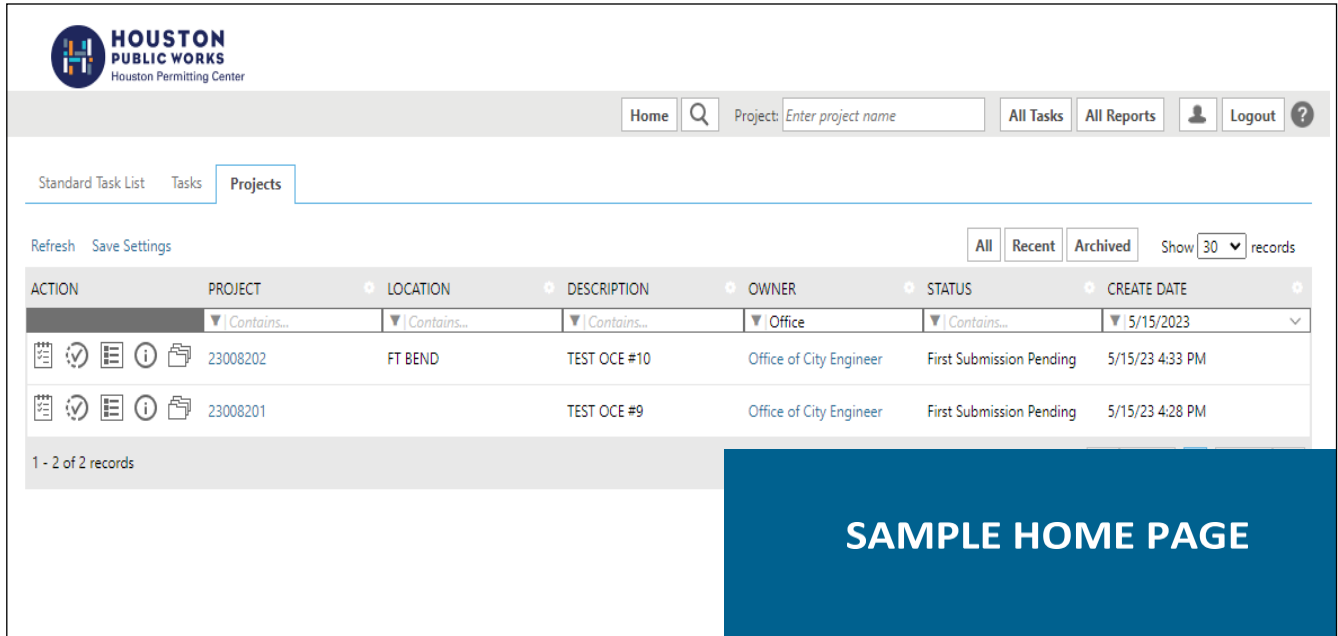
Click the **Save** button to continue to the home page.

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...)



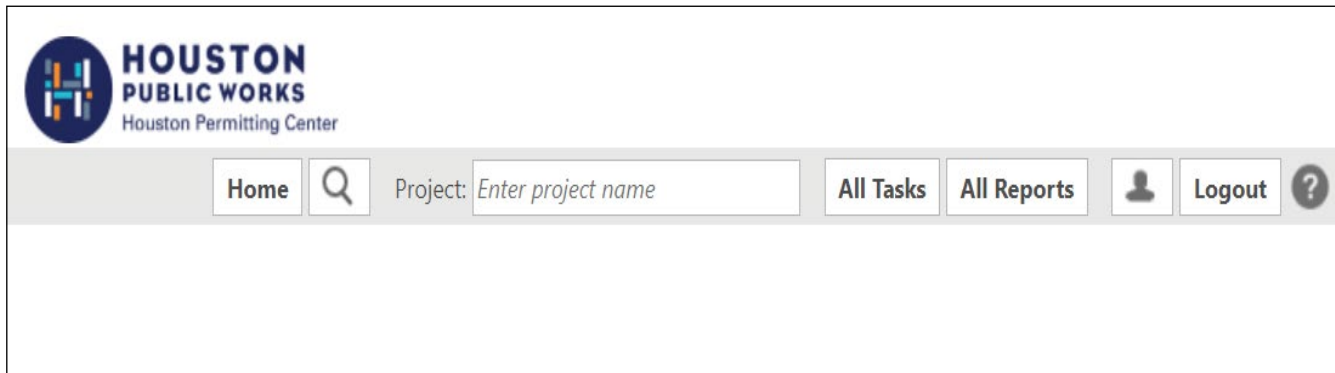
**ProjectDox can be used in multiple browsers, including Chrome, Safari, FireFox, and Edge.** Review the *System Use Requirements* document located on the ProjectDox login page to ensure proper set up is completed

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.

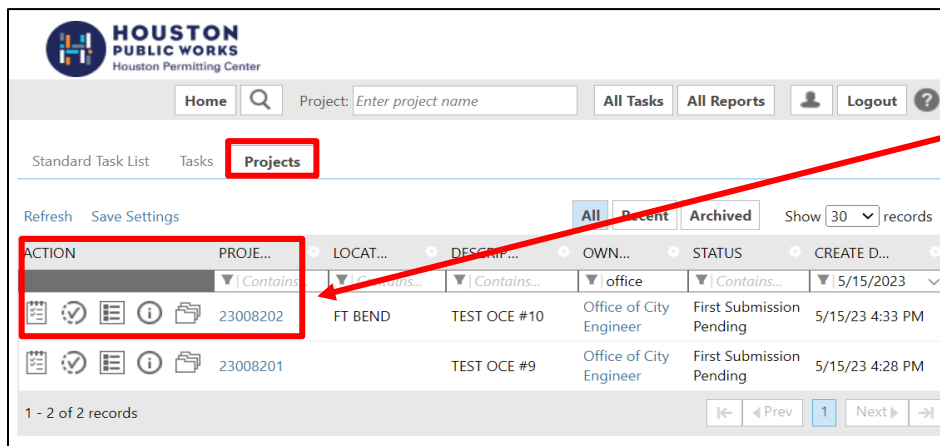
# Navigation Basics

## 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.

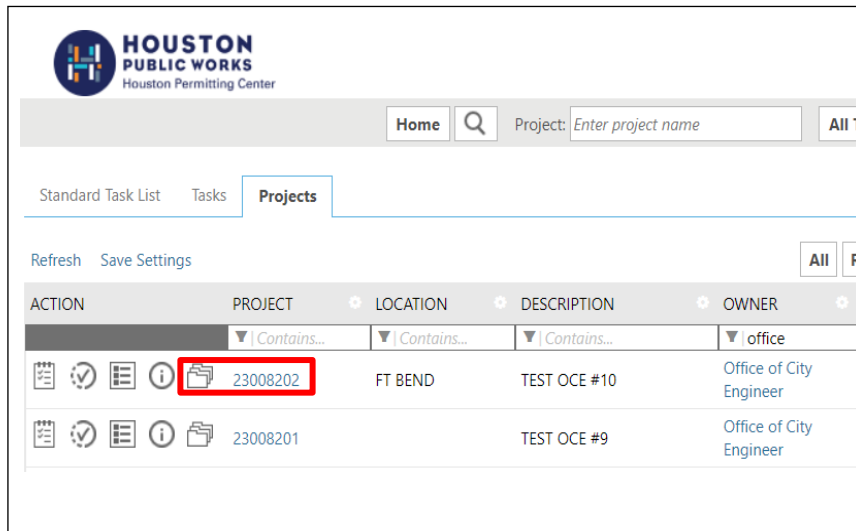
All drawings should be uploaded as single page files (ex: 20 pages = 20 files) into the **Drawings** folder for each project. All documentation (any non-drawing files, easements, availability letters, geo-technical reports, etc.) should be uploaded as multi- page files into the **Documents** folder.

| 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         |

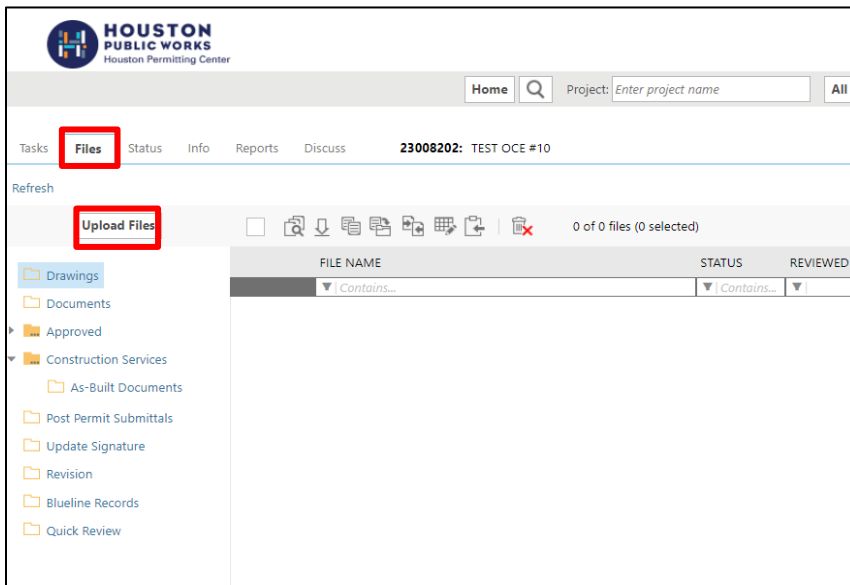


# Uploading Your Files

## 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.



HOUSTON PUBLIC WORKS  
Houston Permitting Center

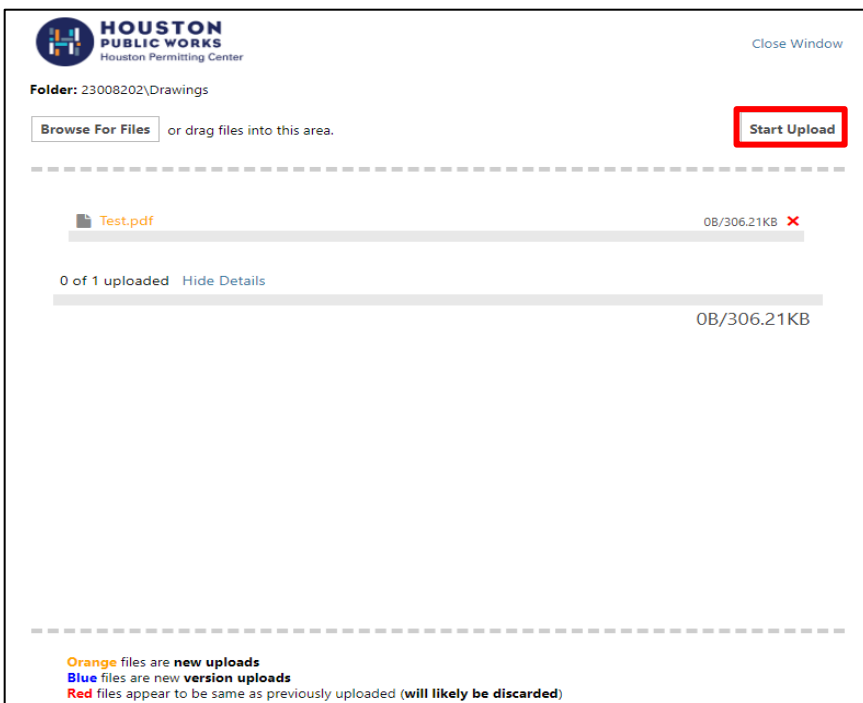
Close Window

Folder: 23008202\Drawings

**Browse For Files** or drag files into this area.

Start Upload

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



HOUSTON PUBLIC WORKS  
Houston Permitting Center

Close Window

Folder: 23008202\Drawings

Browse For Files or drag files into this area.

Start Upload

Test.pdf 0B/306.21KB

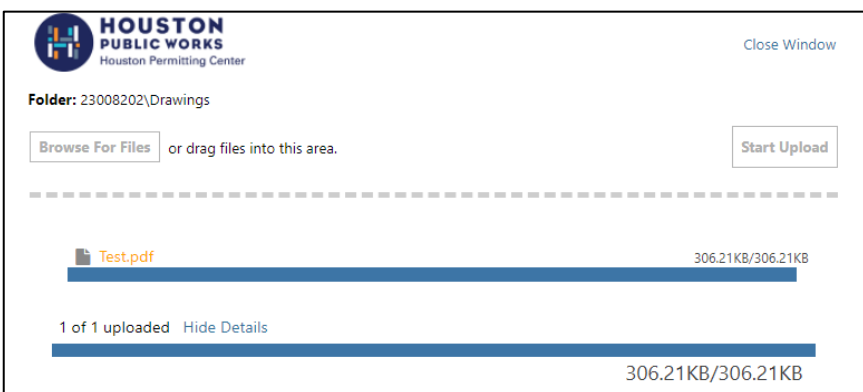
0 of 1 uploaded Hide Details

0B/306.21KB

Orange files are new uploads  
Blue files are new version uploads  
Red files appear to be same as previously uploaded (will likely be discarded)

2. Select the file and click Open.

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



HOUSTON PUBLIC WORKS  
Houston Permitting Center

Close Window

Folder: 23008202\Drawings

Browse For Files or drag files into this area.

Start Upload

Test.pdf 306.21KB/306.21KB

1 of 1 uploaded Hide Details

306.21KB/306.21KB

# 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.

The screenshot shows the Houston Public Works Houston Permitting Center web application. The top navigation bar includes the Houston Public Works logo, a search bar, and links for Home, Project (with a search input), All Tasks, All Reports, Logout, and a help icon. The main content area is titled "23008202: TEST OCE #10" and "Main Contact: TEST ENGINEER". The "Files" tab is selected, showing a list of files. A red box highlights the delete button (red X) in the toolbar. Another red box highlights the "Test.pdf" file in the table. The table has columns for FILE NAME, STATUS, REVIEWED, UPLOADED, DATE, and SIGNED. The "Test.pdf" file is listed with a status of "New", uploaded by "Monica De Santiago" on "6/1/23 3:22 PM", and with a "Not Found" signature.

| FILE NAME | STATUS | REVIEWED | UPLOADED           | DATE           | SIGNED    |
|-----------|--------|----------|--------------------|----------------|-----------|
| Test.pdf  | New    |          | Monica De Santiago | 6/1/23 3:22 PM | Not Found |

# 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.

The screenshot shows the Houston Public Works ProjectDox interface. At the top, there's a header with the logo and 'Houston Permitting Center'. Below it, a navigation bar includes 'Home', a search icon, and a 'Project: Enter project name' field. The main content area has tabs for 'Tasks', 'Files', 'Status', 'Info', 'Reports', and 'Discuss'. The 'Tasks' tab is active, showing a table with columns: ACTION, TASK, PROJ..., GRO..., STA..., PRIOR..., DUE DATE, and CR. A task is listed with 'Applicant Upload' as the task name and '23008202' as the project ID. The 'Accept' button is highlighted with a red box.

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.

This screenshot shows two overlapping windows of the Houston Public Works ProjectDox interface. The top window shows the 'Tasks' tab with the 'Accept' button highlighted in the 'Action' column. The bottom window shows the 'Projects' tab with the '23008202' project ID highlighted in the 'Project' column. Red arrows point from the 'Accept' button in the top window to the '23008202' project ID in the bottom window, indicating the workflow path.

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

The screenshot shows the 'APPLICANT UPLOAD' form. At the top right are logos for 'ProjectFlow BUILDING' and 'avolve software'. Below the title is a tabbed interface with 'Task Information' selected. The 'Task Information' section includes fields for 'Project Name', 'Project Description', 'Workflow', and 'Task Due Date' (6/12/23 2:38 PM). Below this is a step indicator: 'STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required'. The 'File Upload for:' section shows a file selection interface with buttons 'Select Files to Upload' and 'View Folders', and a list of documents (1 - 1 New). Below this is another step indicator: 'STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit'. A 'Confirmation' section is highlighted with a red box, containing a red error message 'Selection is required.' and a checkbox labeled 'I have uploaded all required drawings and/or documents.' which is currently unchecked. Below the confirmation section is 'STEP 3 of 3: Click the "Submit" button below to complete your task'. At the bottom right are two buttons: 'Submit' (highlighted with a red box) and 'Complete Later'.

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

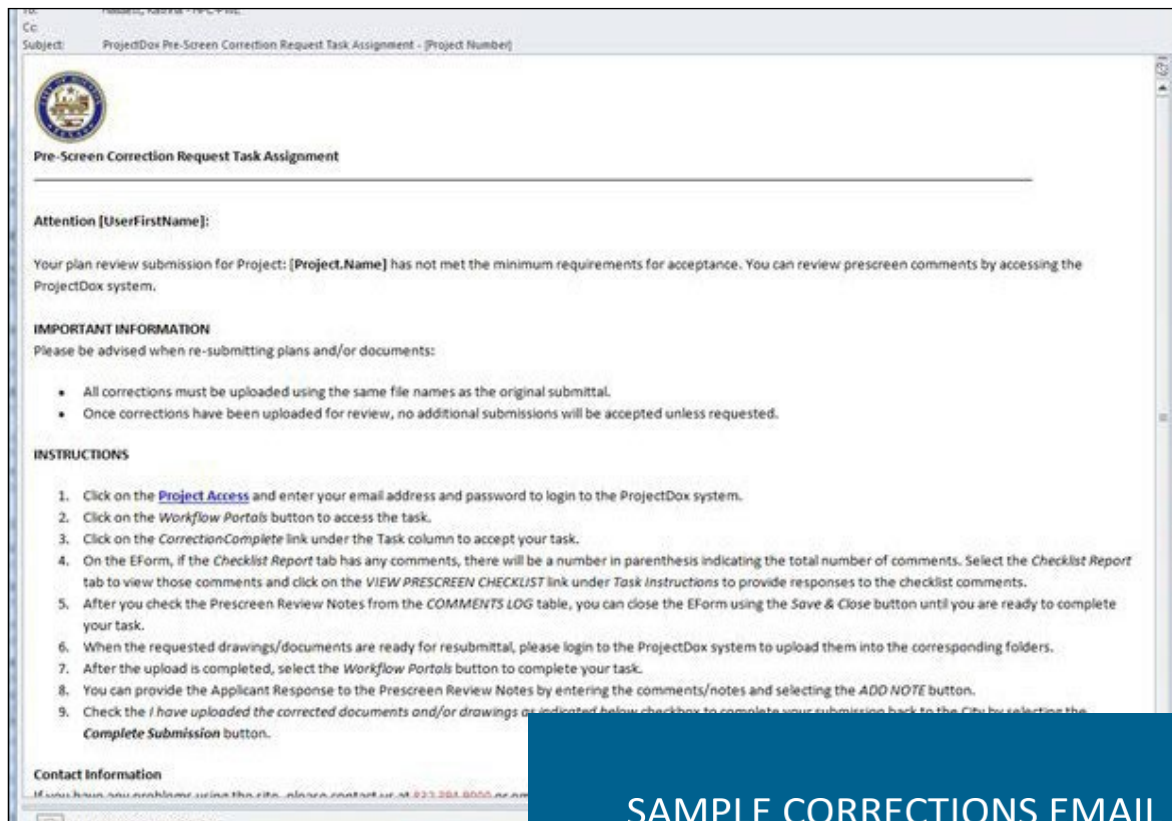
During the pre-screen review, the Intake group will review the uploaded files for completeness and compliance with the standards.

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.



# 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...



|   |     |    |
|---|-----|----|
| Are your updated files named exactly the same* as the prior versions? | Yes | No |
|---|-----|----|
  - 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


**APPLICANT RESUBMIT**


---

Project Information
Permit Information
HOLD Data
Resources
Invite Design Team

**Project Name:** 19116566

**Project Description:** TEST UPGRADE 5.73

**Coordinator:** Enrique Leon

**Review Cycle:** 1

**Workflow/Activity Name:** OCE Workflow/Applicant Resubmit

**Current User Login:** Claudia Garcia (Claudia.Garcia@houston.tx.gov)

**Task Instructions**

After you have successfully uploaded all required plans and documents, please click the Resubmit Complete button.

### 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.”


**Discussion Comments**

**Discussion Topic:** Staff Review Applicant Resubmit

**Description:** Staff Review Applicant Resubmit

**Project:** 19116566

**Discussion Leader:** Claudia Garcia

**Add Comment** 

Show 5 records

| DISCUSSION COMMENT | PARTICIPANT | DATE/TIME |
|--------------------|-------------|-----------|
| 0 - 0 of 0 records |             |           |

prev 1 next

View Changemark Items (0)
View/Edit Checklist Items (0)

| Department           | Reviewed By  | Status        | Reviewer Comments | Applicant Comments |
|----------------------|--------------|---------------|-------------------|--------------------|
| Water Supervisor 831 | Enrique Leon | Rejected (RJ) |                   |                    |

**Task Instructions**

☐ I have reviewed and addressed, including responses where appropriate, all Checklist Items accessed by clicking on the "Checklist Items" button above.

☐ I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.

☐ I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.

Resubmit Complete
Close


# HOW TO RUN REPORTS IN PROJECTDOX

HOUSTON PUBLIC WORKS  
Houston Permitting Center

Home

Standard Task List **Tasks** **Projects**

Refresh Save Settings

| ACTION  | PROJECT  | LOCATION    | DESCRIPTION                      | OWNER                   |
|---|----------|-------------|----------------------------------|-------------------------|
|  | 23008178 | Contains... | Contains...                      | Contains...             |
|   | 23008178 |             | TEST OF DEV PDOX FINAL COUNTDOWN | Office of City Engineer |

## 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

HOUSTON PUBLIC WORKS  
Houston Permitting Center

Home  All Tasks All Reports Logout

Tasks Files Status Info **Reports** Discuss Reviews 23008178: TEST OF DEV PDOX FINAL COUNTDOWN Main Contact: TEST ENGINEER

Refresh Save Settings Show 50 records

| ACTION  | REPORT NAME   | REPORT TYPE | REPORT DESCRIPTION   |
|---|---|-------------|--|
|    | Current Project - All Emails Sent                           | Project     | All template emails sent from within this project  |
|    | Current Project - All Group Users                           | Project     | All project users listed by group and name   |
|    | Current Project - All Logged Events                         | Project     | All logged events for a project between specified dates  |
|    | Current Project - All Uploaded Files with Sheet Sizes       | Project     | All uploaded files with sheet sizes within this project  |
|    | Current Project - Combined Discussions                      | Project     | Project discussion comments, discuss file and workflow form discussions                            |
|   | Current Project - Discussion Comments with All Participants | Project     | Project discussion comments listing all topic participants   |
|  | Current Project - Unpublished Files                         | Project     | All unpublished files within this project  |
|  | Current Project - User Activity History by Date             | Project     | All logged project events by a named user between specified dates                                  |
|  | Plan Review - Department Review Status                      | ProjectFlow | Status of departmental reviews for a specified workflow  |
|  | Plan Review - Discussion Board Plan Review                  | ProjectFlow | Discussions within workflow task forms used within this project                                    |
|  | Plan Review - Review Comments                               | ProjectFlow | Lists the review comments, checklist and changemark details for a workflow instance review cycles. |
|  | Plan Review - Review Details                                | ProjectFlow | Displays the Workflow Routing Slip with a list of review comments                                  |
|  | Plan Review - Workflow Routing Slip                         | ProjectFlow | Displays the sequential routing and times for completed or current plan review tasks               |
|  | ProjectFlow - Department Review Status                      | ProjectFlow | Status of departmental reviews for a specified workflow  |
|  | ProjectFlow - Workflow Routing Slip                         | ProjectFlow | Displays the sequential routing and times for completed or current plan review tasks               |

Workflow: 22000049 - PFlow OCE Template - 10/19/2022 2:51:42 PM

1 of 1 100% Find | Next

### Plan Review - Department Review Status

Project Name: 22000049  
Workflow Started: 10/19/2022 02:51 PM  
Report Generated: 06/05/2023 02:37 PM

| CYCLE | DEPARTMENT                  | STATUS        | REVIEWER        |
|-------|-----------------------------|---------------|-----------------|
| 1     | Water-Wastewater Supervisor | Rejected (RJ) | {Reviewer Name} |
| 2     | Water-Wastewater Supervisor | Approved (AP) |                 |
| 3     |                             |               |                 |



# 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.

### STEP 1 of 4: Respond to all comments, as requested

#### Resolve Review Comments ?

Unresolved Comments: 2

Submitter Questions: 1

Info Only Comments: 2

Files with Markups: 1

Plan Review:

[Review Comments](#)

*Review and respond online.*

[Export to Excel](#)

[Import Excel Responses](#)

[Watch video](#)

*Review and respond in Excel, then upload your responses.*

#### Department Review Results ?

| DEPARTMENT           | REVIEWED BY                               | STATUS        |
|----------------------|---|---------------|
| Water-Wastewater 814 | Enrique Leon - Enrique.Leon@houstontx.gov | Rejected (RJ) |

# Review of Plans

## APPLICANT RESUBMIT TASK

**STEP 1 of 4:** Respond to all comments, as requested

Resolve Review Comments

Unresolved Comments: 2  
 Submitter Questions: 1  
 Info Only Comments: 2  
 Files with Markups: 1

Plan Review: **Review Comments** | Export to Excel | Import Excel Responses | Watch video

Review and respond online. | Review and respond in Excel, then upload your responses.

Department Review Results

| DEPARTMENT           | REVIEWED BY           | STATUS        |
|----------------------|-----------------------|---------------|
| Water-Wastewater 814 | REVIEWER NAME – EMAIL | Rejected (RJ) |

ProjectDox - ProjectDox 9.2.3.9672 - Work - Microsoft Edge  
 https://houston-tx-us.avolvedcloud.com/ProjectDoxWebUI/Project/ProjectCorrections?projectId=202662&workflowTaskID=2168692

Dept: Show All | Status: Show All | Response: Show All | Search: Enter keyword | Close Window  
 Type: Show All | Cycle: Show All | Time: Show All

Refresh | Watch video

| Ref.#   | Comment               | Applicant   | Enrique Leon | 6/15/23 1:39 PM | Cycle 1 | Type your response here. |
|---------|-----------------------|---|--------------|-----------------|---------|--------------------------|
| Ref.# 2 | Question<br>Inquiry   | TEST COMMENT  |              |                 |         |                          |
| Ref.# 1 | Info Only<br>Comment  | Intake<br>1. Missing sheets 2 to 10, please upload or modify index to show as not included in public set.                                       | Enrique Leon | 6/8/23 2:06 PM  |         | No response required.    |
| Ref.# 3 | Unresolved<br>Comment | Water-Wastewater 814<br>Free Comment that can apply to overall sheet.   | Enrique Leon | 6/15/23 2:03 PM | Cycle 2 | Type your response here. |
| Ref.# 4 | Unresolved<br>Markup  | Comment Sticky<br>Water-Wastewater 814<br>C07 - Manhole Frame and Cover.pdf<br>Comment applying to a particular area as noted by "sticky note". | Enrique Leon | 6/15/23 2:04 PM | Cycle 2 | Type your response here. |
| Ref.# 5 | Info Only<br>Comment  | Water-Wastewater 814<br>Some comments are only informative and require no response.   | Enrique Leon | 6/15/23 2:07 PM | Cycle 2 | No response required.    |

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 original file name(s).
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.

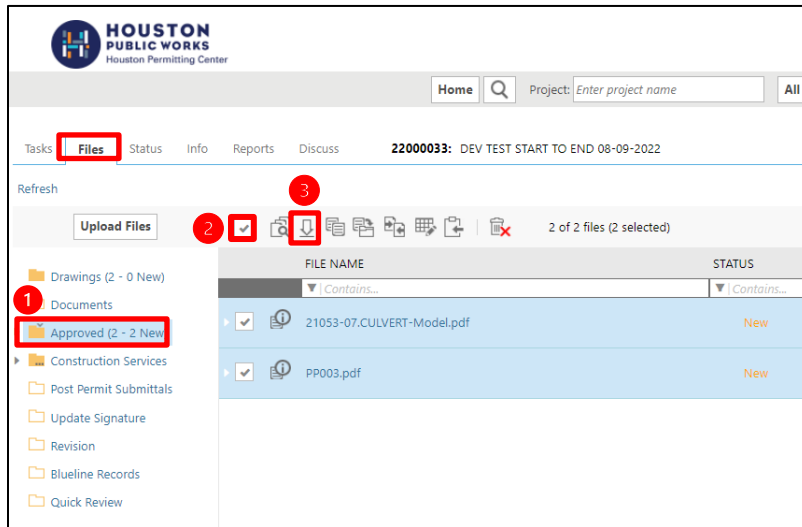
Note: If new sheets are needed to be inserted/uploaded and renumbering existing sheets is a must, you may:

- 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

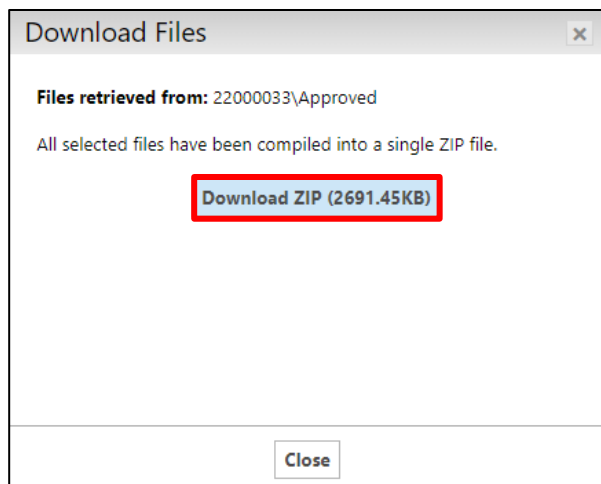
After the payment is made in iPermits system, you will receive an Approved Plans Ready for Download email indicating that you may login to ProjectDox and download your approved plans in the folder marked **Approved**.



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.**



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](mailto: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](mailto: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 changes to approved plans', and sign and date the note.**

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

### 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.



**Thanks for using electronic plan review!**

If you need further assistance, please contact us via email at  
**[oce@houstontx.gov](mailto:oce@houstontx.gov)**



# **HOUSTON PUBLIC WORKS**

Houston Permitting Center

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