

Sign Administration Plan Review

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



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Overview ELECTRONIC PLAN REVIEW

This document will guide first-time users through the electronic plan review (EPR) process for **on- premises signs only**, including wall, projecting, marquee, directional and ground signs. Off- premises signs must follow the current manual process (i.e. via paper plans).

Two online systems are used to complete the steps in the EPR process **iPermits** and **ProjectDox**. The iPermits portal is used for the completion of permit applications, address verification and payments. The ProjectDox system is used to upload plans, receive and respond to comments. Approved plans, permits & site verification sheets are accessed via iPermits.



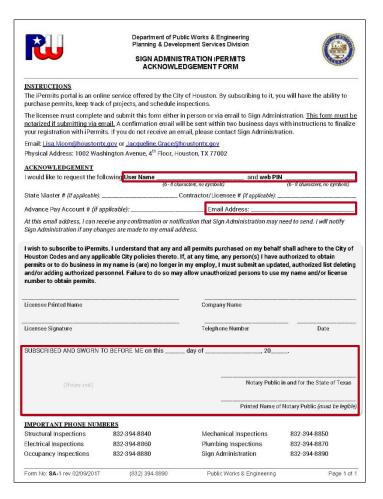
STEP 1: CREATE A COMPANY PROFILE

A company and its users must be registered for iPermits before an application can be submitted. If your company is already registered, please skip to page 9.

To create a company profile, the licensee must complete an **iPermits Acknowledgement** form and submit it either in person or via email to:

signadministration@houstontx.gov

The form must be notarized if submitting via email. All fields are required unless otherwise noted.



Choose a **User Name** and **Web PIN** that is between six to eight characters in length and does not contain symbols (ex: #, %, &, @, etc.).

To prevent unauthorized use, do not share the Web PIN.

Provide an **Email Address** where you can receive direct communication from Sign Administration staff.

STEP 2: CREATE A SECURITY ADMINISTRATOR



Once the iPermits Acknowledgment form has been processed, instructions will be emailed to the user to complete a user profile.

From the <u>iPermits login page</u>, select the link **Click here to register** next to *First-time user?*



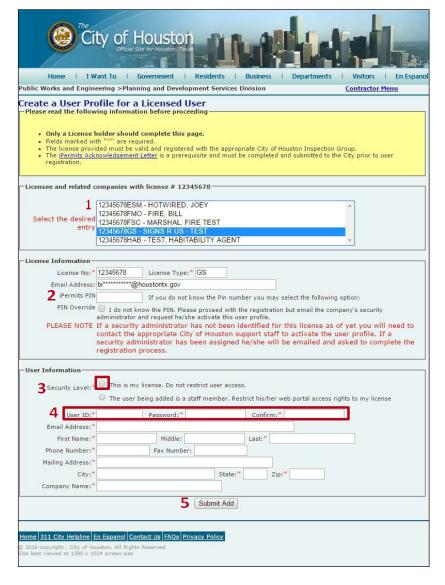
On the next screen, select Yes to the first question: Are you associated with an electrical, plumbing, mechanical, fire alarm, fire line, sign or sprinkler trade contractor?

Then enter the company's **license number** and click on **Submit button**.



The first person to create a user profile under a company will be assigned the role of Security Administrator by default.

STEP 2: CREATE A SECURITY ADMINISTRATOR



- Select the appropriate company and licensee from the list. The license information will display below.
- 2. Enter the **iPermits PIN** submitted with the iPermtis Acknowledment from.
- Under Security Level select the option: This my license. Do not restrict user access.
- Enter the **User ID** submitted with the iPermits Acknoledgement form.
 Choose a **Password** between 6-8 characters (no symbols).
- Complete the remaining required fields and click on the **Submit Add** button.



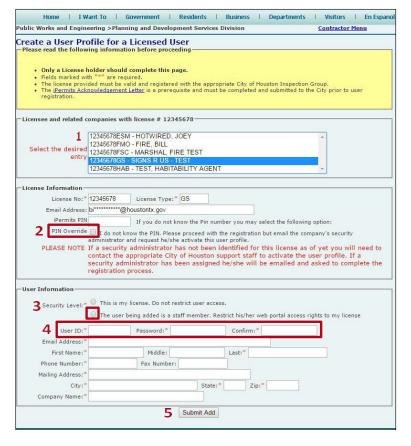
The Security Administrator is responsible for managing corporate users, overseeing the advance pay account, and associating other licensed contractors or companies to the company profile. This role may be re-assigned once additional users are registered.

STEP 3: REGISTER ADDITIONAL USERS



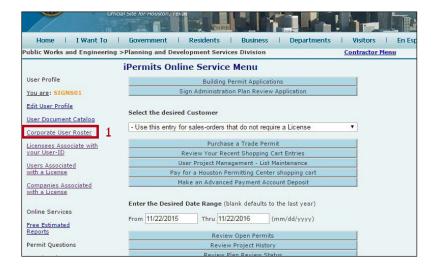
Additional company users may self- register for iPermits under the company's license number. From the iPermits login page, select the link Click here to Register.

Answer **Yes** to the first question. Enter the company's license number and click on the **Submit** button.

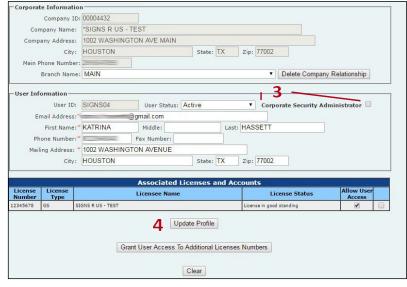


- Select the appropriate company and licensee from the list. The license information will display below.
- Check the box for PIN OVERRIDE.
- Under Security Level select the option: The user being added is a staff member. Restrict his/her web portal access rights to my license.
- 4. Choose a **User ID** and **Password** between 6-8 characters.
- Complete the remaining required fields and click on the **Submit Add** button.
- 6. The account is now pending activation by the Security administrator(s).

STEP 3: REGISTER ADDITIONAL USERS







- The Security Admistrator (SA) will receive an email whenever a new user account is requested. To approve a request, the SA will log into iPermits and select Corporate User Roster from the iPermits Online Service Menu.
- 2. Click on the **User-ID** with the *Pending Activation* status.
- Change the User Status to Active. Optionally, you may assign the role of Corporate Security Administrator to the new user by checking the box.
- 4. Select the **Update Profile** button to complete activation.



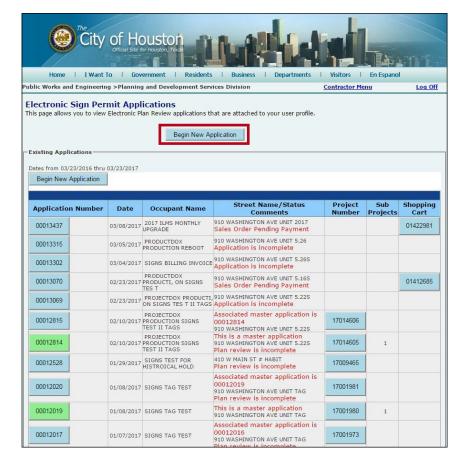
To remove a user, change the user status to Inactive and un-check the box for Allow User Access to the company's license(s).

SIGN PERMIT APPLICATION



Log into your iPermits Portal account.

Under the iPermits Online Service Menu, click on the **Sign Administration Plan Review Application** button.



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



ADDRESS SEARCH



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

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

Note: If a direction is part of the street name (North Sam Houston Parkway, East Freeway, etc.), spell out the word.



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

If your street name does not appear, click on the button

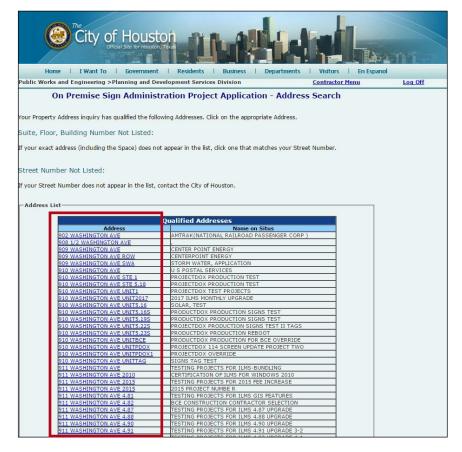
The needed street name is not listed and contact the Addressing team

Hpcaddressing.team@houstontx.gov for assistance.



All Sign applications must be associated with an address and a Certificate of Occupancy (CO). An erroneous address can delay the review process.

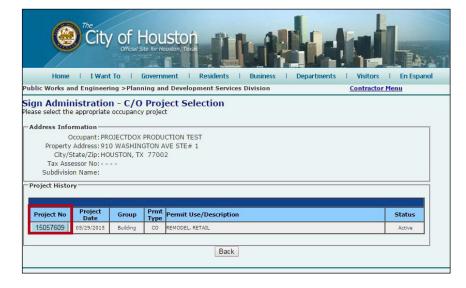
CO SELECTION



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

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

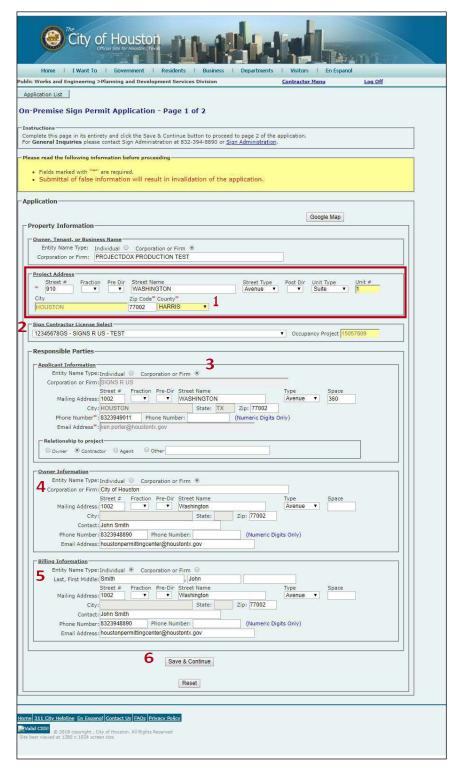
If the street number is not listed, click on the button **The needed property address is not listed** and contact the Addressing Team via email at Hpcaddressing.team@houstontx.gov for assistance



Select the appropriate **Project No.** which corresponds to the Certificate of Occupancy (CO) for that address.

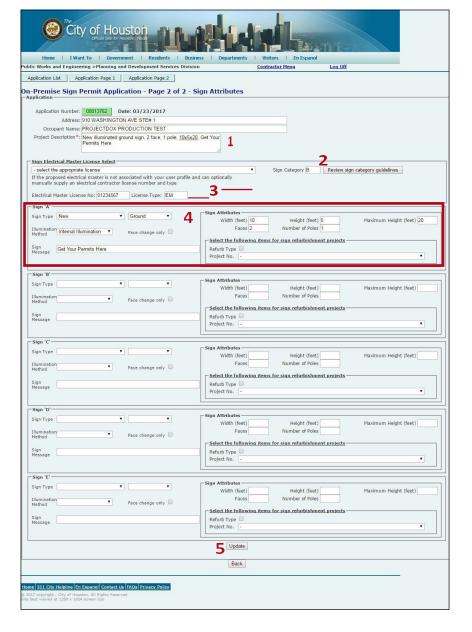
Click on the **Back** button to return to the list of qualified addresses. If a project number is not listed, it is important to confirm that a CO exists for that address. Please contact Occupancy Inspections Section or Open Records Section for further assistance.

SIGN PERMIT APPLICATION - PAGE 1



- Choose the County in which the project is located only. Do not change any of the pre-populated fields in the address section.
 (Note: You must select the County from the County* drop-down list.)
- 2. Choose the appropriate contractor license from the drop-down list.
- Select the applicant's Relationship to project.
- 4. If the applicant is not the owner, complete the Owner Information fields.
- Complete the Billing Information fields. An accurate billing address is required for annual renewal invoicing.
- 6. Once all required fields are completed, click the Save & Continue button to go the next page.

SIGN PERMIT APPLICATION - PAGE 2



- 1. Enter a Project Description.
- 2. Enter the appropriate Sign Category. Click on the Review sign category guidelines button for assistance.
- 3. If the sign requires illumination an Electrical Master must be identified on the application.
 - If electrical master licenses have been associated with the Sign company profile, choose the appropriate license number from the drop-down list.
 - Otherwise, enter the electrical master's license number and license type (i.e. EM, EMS, ESM, or ESS) for the project.
- 4. Enter all sign attributes, messages, sign types, and illumination methods for up to five signs.

Note: Never check the Refurb box or select a Project No. unless it's for a bona fide Refurb.

- * To get a project staged for a Refurb, or for questions, contact the Plan Analyst Supervisor.
- Once all required fields are completed, click the Update button. The page will refresh.



You will receive a project number for each sign entered. If you require more than five signs, please submit multiple applications.

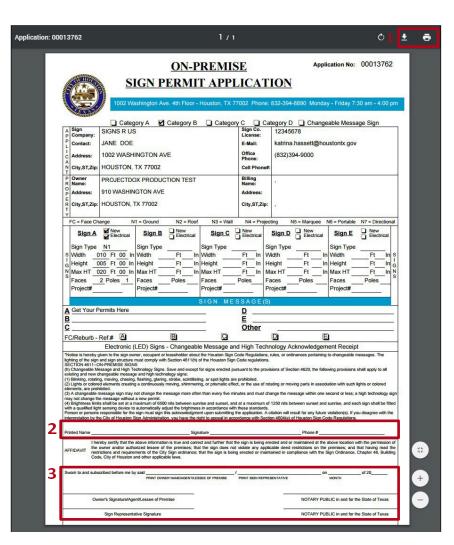
GENERATE AFFIDAVIT



After the page refreshes, two additional buttons will now appear at the top of page.

PLEASE DO NOT UPLOAD ANY FILES OR DRAWINGS IN THE DOCUMENTS ATTACHED PAGE.

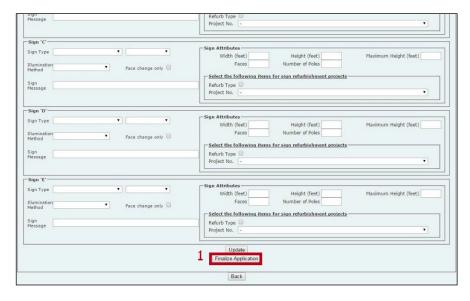
1. Click the **Generate PDF** button.



- 2. From the pop-up window, print or save the application.
- If any proposed sign is either a High Technology or Changeable Message Sign, the client (business owner or location manager) must complete the Changeable Message and High Technology Acknowledgment Receipt.
- 4. All applicants must sign and notarize the Affidavit.
- 5. Scan and save the notarized application to your computer.

Note: Scanning is accomplished via a conventional image scanner - *not* digital image capturing via Smart Phone or digital camera.

Application ProcessFINALIZE APPLICATION- PAGE 2



To finalize and submit the application to Sign Administration scroll to the bottom of APPLICATION PAGE 2 and click on the Finalize Application button.

Upon finalizing the application, the plan exam fee and site inspection fee are due.



• If the application needs to be updated, proceed to the Shopping Cart Maintenance screen and click-on the sales order button.

Configure the Appropriate Fees
Contractor Information

License No:12345678 License Type: GS
Company Name:TOO MUCH INFORMATION
Contractor Name:SIGNS HPC - TEST
Contractor Address:1002 WASHINGTON AVE
City/State/Zip:HOUSTON, TX 77002
Contractor Email:billy.simmons@houstontx.gov
Contractor Phone:(281) 654-7895 Cell:

This sales order is a request to create a new ILMS project at the following address

Address: 911 WASHINGTON AVE UNIT 5.74

This information is critical to the validity of any permits issued by the City of Houston. If it in any way inaccurately describes the location of the work to be done, the City reserves the right to cancel the permit and a new permit will need to be purchased.

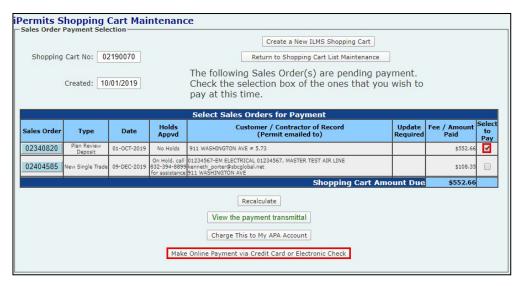
Project Details

Sales Order: 02528940

Delete This Sales Order

A new screen opens, with a Delete This Sales Order button. Click on that button to delete the sales order and unlock the application pages. Update the application, then repeat Step 1.

Pay the Fees CRECIT CARD OR E-CHECK



ILMS Shopping Cart Online Payment Processing Payment Selection Shopping Cart No: 02218046 Return to Shopping Cart Maintenance We need to collect the following data before your Created: 11/15/2019 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 Payment Processed: accuracy is important. CC Holder Type: Individual

Corporation or Firm PROJECTDOX Last, First Middle: PROJECTDOX TESTER1 House # Fraction Pre-Dir Street Name Type Space WASHINGTON Billing Address: 1002 Avenue Billing Zip Code: 77002 0000 74.33 Update Payer Information Continue the Credit Card/Electronic Check Payment Proce Please Note: Electronic Check payments cannot be submitted after 8:30 PM.

Upon finalizing the application, the plan exam fee and site inspection fee are due.

1.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. You
will be taken to Chase website
to complete the online payment.

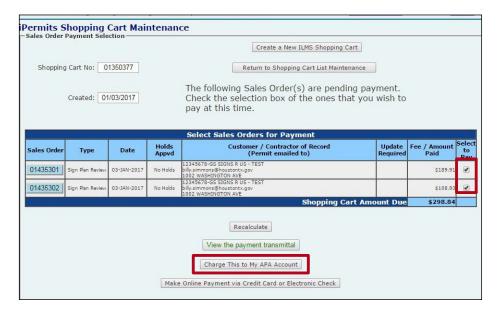
Processed payments are indicated by a project number in red

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

You will be transferred to the J.P Morgan payment website to complete the transaction. A receipt will be emailed to you from J.P Morgan. You may need to check your spam or junk folder.

Pay the Fees

ADVANCED PAYMENT ACCOUNT



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

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

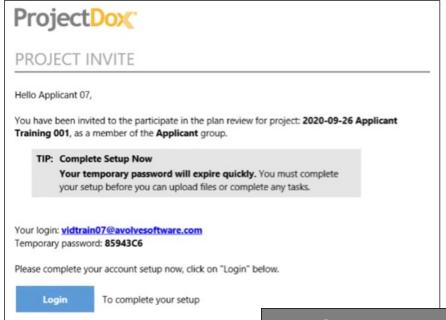
• If the application needs to be updated, click-on the sales order button. A new screen opens, with a Delete This Sales Order button. Click on that button to delete the sales order and unlock the application pages.



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

ProjectDox Set Up

NEW USER ACCOUNT



Sample Invitation

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

First time users should note:

ProjectDox® uses pop-up windows. Configure your browser's pop-up blocker to allow for pop-ups for the ProjectDox® site. If you log in but no ProjectDox® window appears, a pop- up blocker is likely still installed.

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

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

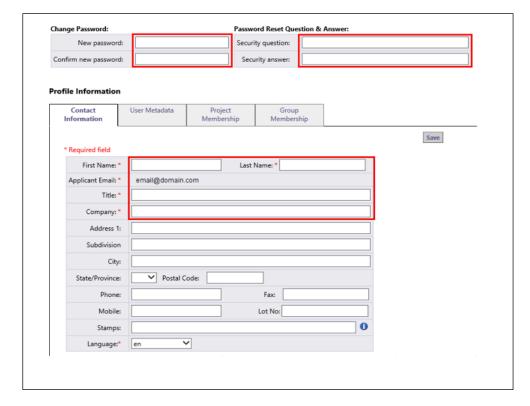
ProjectDox Set Up

NEW USER ACCOUNT



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

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



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

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

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

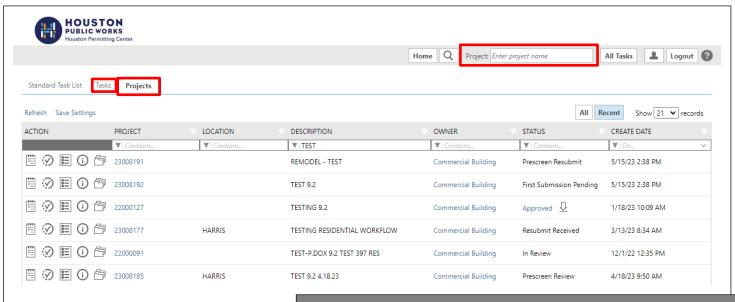
Login into ProjectDox® a second time (and every time after that) you will use the permanent password that you entered in your Profile page.

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

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

Navigation Basics

HOME PAGE LAYOUT & TOOLBARS



SAMPLE PROJECTDOX HOMEPAGE

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

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

The **Projects** List can be sorted by clicking on the header of the column. You can search for words contained in these columns through the **Press Enter to Search** field.

The **Tasks** section of the home page is your Active Task List, which displays all your outstanding Tasks on projects for which you are the main applicant. The Tasks List can be sorted by clicking on the column header. Both the Projects List and Tasks List are set to display a limited number of entries at a time. Use these buttons

Navigation Basics HOME PAGE LAYOUT & TOOLBARS



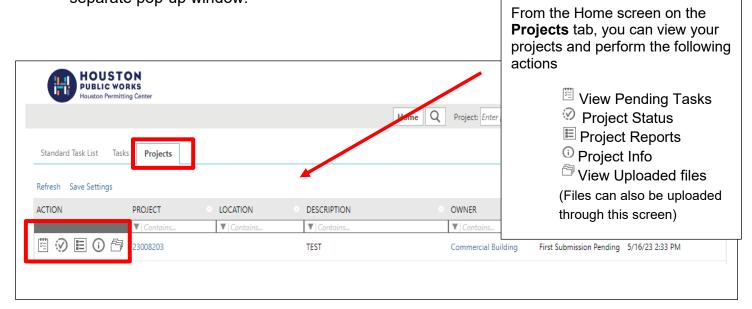
Your primary navigation buttons are located in the upper right corner of the home page.

- The Home button will take you back to the home page.
- The Profile button will take you to your User Profile, where you can edit your personal information or change your password.

The **Search** button allows you to search for a project based on the key information entered in the Project Info Page, or it allows you to search for keywords within a project.

- The Help button takes you to the ProjectDox® Help site. Use the index or search functions to find instructions on specific aspects of ProjectDox®
- The Logout button logs you out of ProjectDox®.

 The All Tasks button shows any tasks requiring action from the applicant in a separate pop-up window.



Standards

FILE TYPES AND BORDERS

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

ACCEPTED FILE TYPES

- Supported file types for documents include DOC, DOCX, PDF, XLS, XLSX, JPEG, GIF, PNG, etc.
- Vector PDF, DWG, DGN, DWF, etc., files will be acceptable for drawings.
- ◆ The City of Houston requires that plans be uploaded in an approved format, to scale, with a <u>minimum</u> output dimension of 8.5" x11".

FILE NAMING CONVENTIONS

All file names are limited to 70 characters.

File names for <u>drawings</u> should be simple and straightforward (e.g., Plot Plan; Survey; Elevations; Construction, Electrial and Attachment; Engineering; etc).

Corrected files should always be resubmitted with the SAME FILE NAME as the original submittal

Note: If this is not followed the submitted file will appear as a NEW file, and not a correction to an existing file.

FOLDER STRUCTURE

Files are securely managed through a predefined folder structure. Users cannot rename or add folders to the structure.

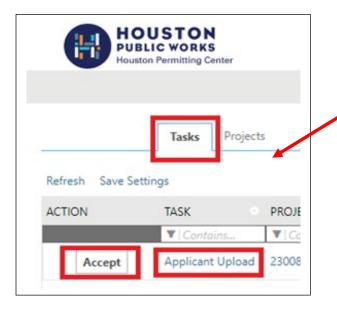
- ♦ Drawings
- ♦ Documents and Photos
- ♦ Reject
- ♦ Changemark Reports

All drawings (or anything submitted in lieu of a drawing [i.e. Title Abstract Report] should be uploaded to the **Drawings folder**. Single-page files may be best, but multiple-page files are acceptable. Note: Don't mix documents or photos with drawings.

All documents or photos should be uploaded to **the Documents and Photos folder**. Again, single-page files may be best, but multiple-page files are acceptable. Note: Don't mix drawings with documents or photos.

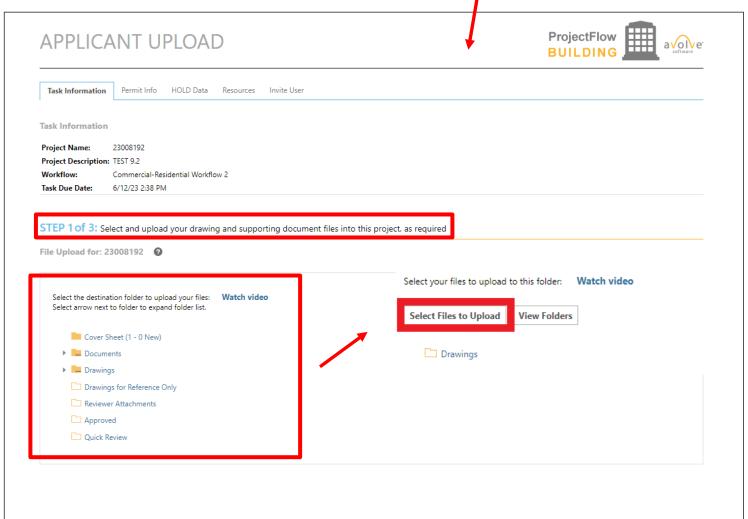
Upload Your Files

FIRST SUBMISSION



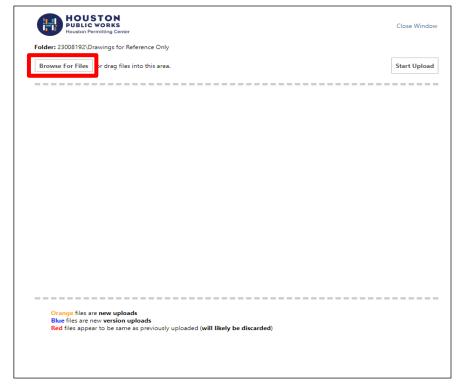
On your Projectdox Home Page click on the **Tasks** tab and click on **Accept or Applicant Upload**.

The eForm window will open in a pop-up screen. From there the applicant may select and upload drawings and supporting documents into the project



Upload Your Files

FIRST SUBMISSION



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

Click **Browse for Files** or Drag files into the Upload window.

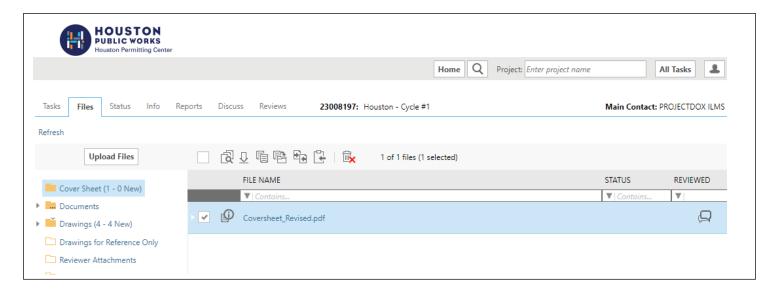
Once all files have been selected or dragged, Click **Start Upload**.

To upload files into a different folder, repeat the process until all drawings and documents are uploaded into their respective folders.





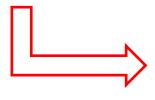
Managing Files

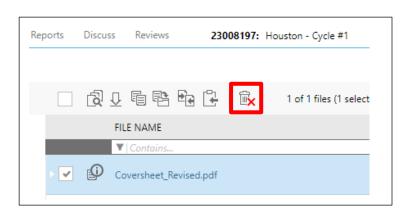


Once files are uploaded into a folder, the files will be visible. Next to each file is the file name, upload date and time, file size, and name of the user who uploaded that file.

If a file is uploaded into the wrong folder, select the check box next to the file name and then select the delete icon. Individuals invited into a project will not have this ability and should contact the main applicant to delete files.

To upload files into another folder, click on the folder. Repeat the process until all drawings and documents are uploaded into their respective folder.





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

Completing the Submittal

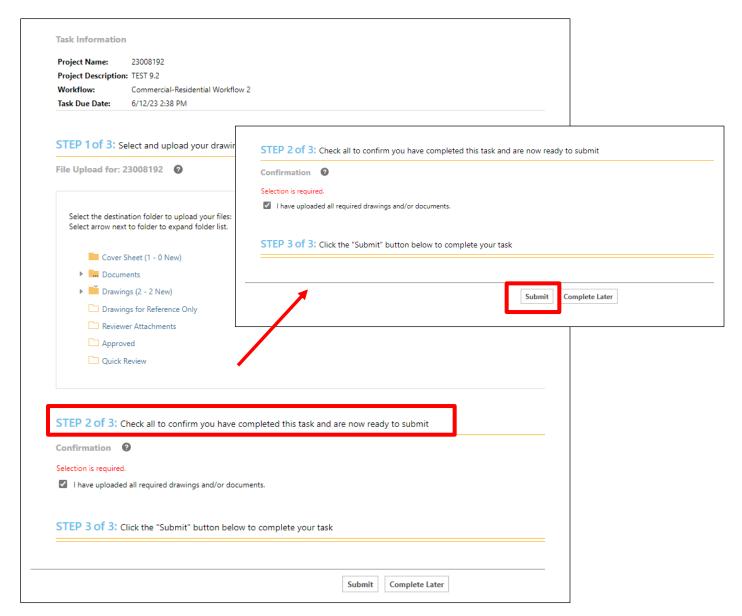
ProjectDox® moves a project through a series of tasks called a workflow. Some of these tasks are assigned to the applicant and others to City staff.

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

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

To notify the City of Houston that your plans are ready for pre-screen, the applicant must complete the **ApplicantUpload** task.

From the **eForm** where plans were uploaded, the applicant will need to check to confirm all required documents and/or drawings have been uploaded.

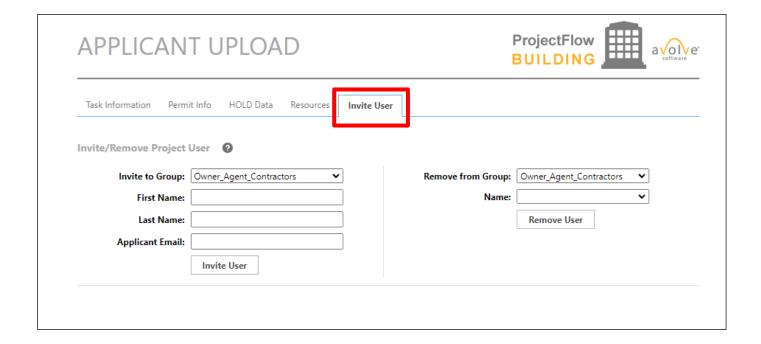


Completing the Submittal

APPLICANT UPLOAD

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

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



Formal Review of Plans

PROCESS OVERVIEW

A supervisor in the Sign Administration Coordinator Group will assign and route the submission to a Plan Analyst for review.

If the review is approved, the plan analyst applies the necessary stamps and annotations. Afterward, the applicant will receive an **Approved email** with instructions.

At this point, permits are set-up, fees are assessed, and permits are sold-out utilizing funds from your AP Account. Note: All permit fees must be paid at the conclusion of the Plan Review, prior to the Site Inspection.

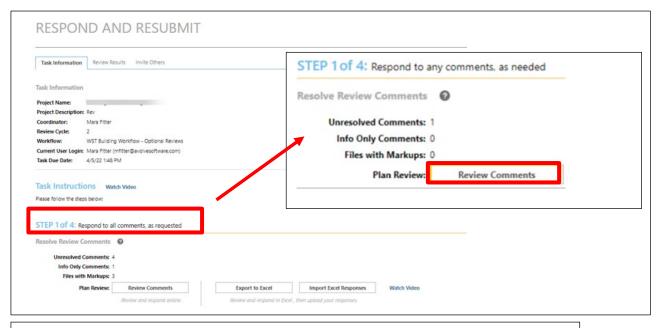
In version 9.2, if the reviewer has selected "Rejected", the applicant will receive an email notification of the **Applicant Respond and Resubmit** task with instructions on how to resubmit to fix the issues.

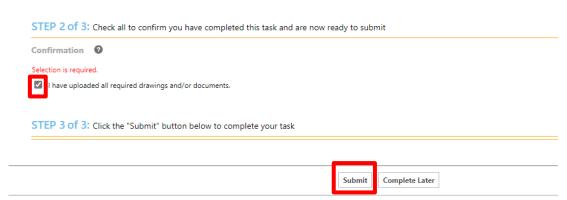
Formal Review of Plans

APPLICANT RESUBMIT TASK

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

- 1. Log in to ProjectDox®.
- 2. From the Home page select **Task** bar
 - a) This can be done from the respond and resubmit email sent to applicant.
- 3. Click on Review Comments:
 - a) View the reviewer comments and markups
 - b) Click on file name to open the drawing with markups
 - c) Add your response in the Applicant Response column
- 4. Make Corrections to the files and upload them to their original folder
 - a) "Versioned Files"- New version of a file previously submitted.
 - b) "New Files"- New file, not previously uploaded and submitted.
- 5. Confirm you have completed Task and are ready to submit.
 - a) Check box "I have responded to all review comments."
 - b) Check box "I have uploaded my revised files, if requested."
 - c) Select the Submit button to complete your task





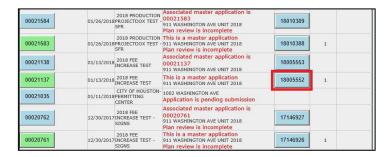
Download Plans

ACCESSING APPROVED PLAN SET & PERMITS

After notification of approval you can download your approved permits, site sheet and stamped plan set.



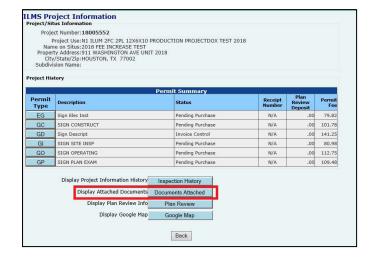
 Log into iPermits and proceed to the Contractor Menu and click the Sign Administration Plan Review Application button.



2. In the Application list find the lead (or lone) project number of the project that has been approved and click on the Project Number button.

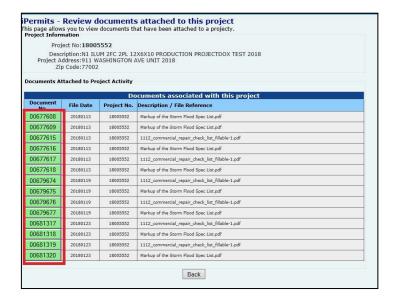
Download Plans

ACCESSING APPROVED PLAN SET & PERMITS



3. The following page will list the attached permit fees for this project number. At the bottom of the page find the Documents Attached button.

NOTE: If there is no Documents Attached button here, then go back to Step 2. & click on the Application Number button. At the top of that page will be a Documents Attached button.



- 4. All the associated permits, site verification sheet, and stamped plans and drawings will be accessible by clicking on the green buttons.
 - For multiple sign packets: If there are ultimately no documents attached to the lead project, try the subordinate project to which the GI Permit (Site Inspection) is attached.

NOTE: Approved Permits, Site Verification Sheets and stamped plans can either be printed, or downloaded to a tablet, laptop or notebook to be present at the job site during installation.



Thanks for using electronic plan review!

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



1002 Washington Avenue Houston, Texas 77002

832.394.8890

signadministration@houstontx.gov www.houstonpermittingcenter.org