CITY OF HOUSTON

ELECTRONIC PLAN REVIEW

Houston Hispanic Architects & Engineers

September 1, 2016

Outline

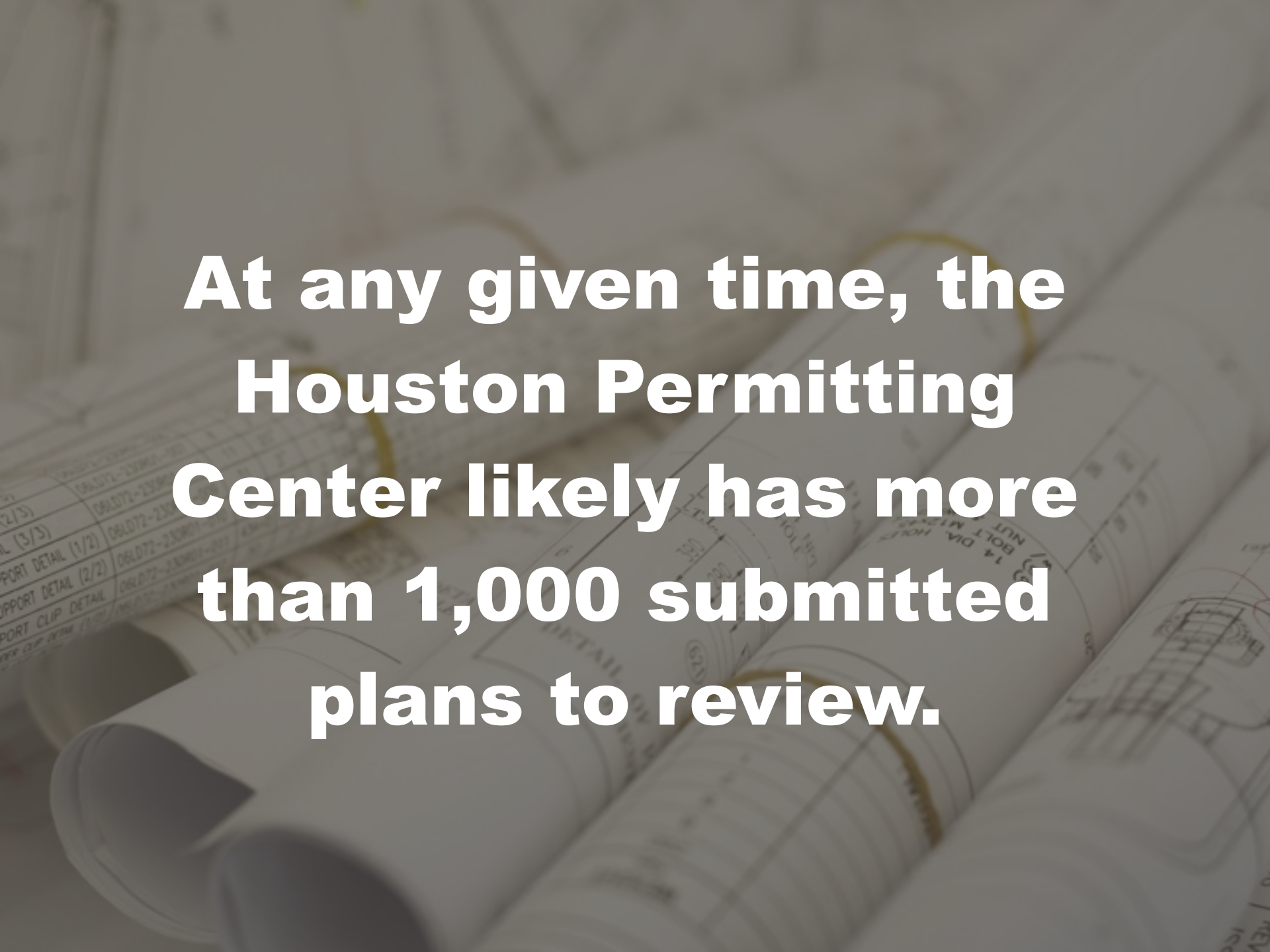
- HPC Overview
- Introduction to eServices
- Benefits of EPR
- EPR Overview
- Workshops
- Future Improvements

Houston Permitting Center

1002 Washington Avenue

It is our priority to measure our customers' satisfaction and continuously strive for improvement.

Four out of five HPC customers are satisfied with our services.


At any given time, the Houston Permitting Center likely has more than 1,000 submitted plans to review.

houstonpermittingcenter.org/dashboard-plans

The City of Houston
Official Site for Houston, Texas

Home | I Want To | Govt | Residents | Business | Departments | Visitors | Espanol

» Dashboard

Houston Permitting Center - Submitted Plans Dashboard

Welcome to the Houston Permitting Center's Online Dashboard.

We consider it a privilege to serve Houston's business and development communities, the driving forces of our city's economy. The Permitting Center's goals are continuously centered on improving the customer's experience. We know you are busy and we value your time. This dashboard provides our customers with an interactive snapshot of our progress - we encourage you to use it to measure our performance against those goals.

This dashboard was designed for our customers. Therefore, if you have questions or comments about this page, or any of the information it contains, please do not hesitate to call us at (832) 394-9000 or e-mail houston.permittingcenter@houstontx.gov

Mark McAvoy
Executive Director

HPC Main Menu

- About Us
- Visiting the HPC
- FAQs
- News and Events
- Code Enforcement Main Page
- Public Works Homepage

Daily Numbers

1241
Total Plans in System for Review

860	15
Commercial Plans	Oldest Plan (in days)
381	13
Residential Plans	Oldest Plan (in days)

Updates Daily Last Updated Thu Dec 01 2016 8:00am

Commercial Plan Review

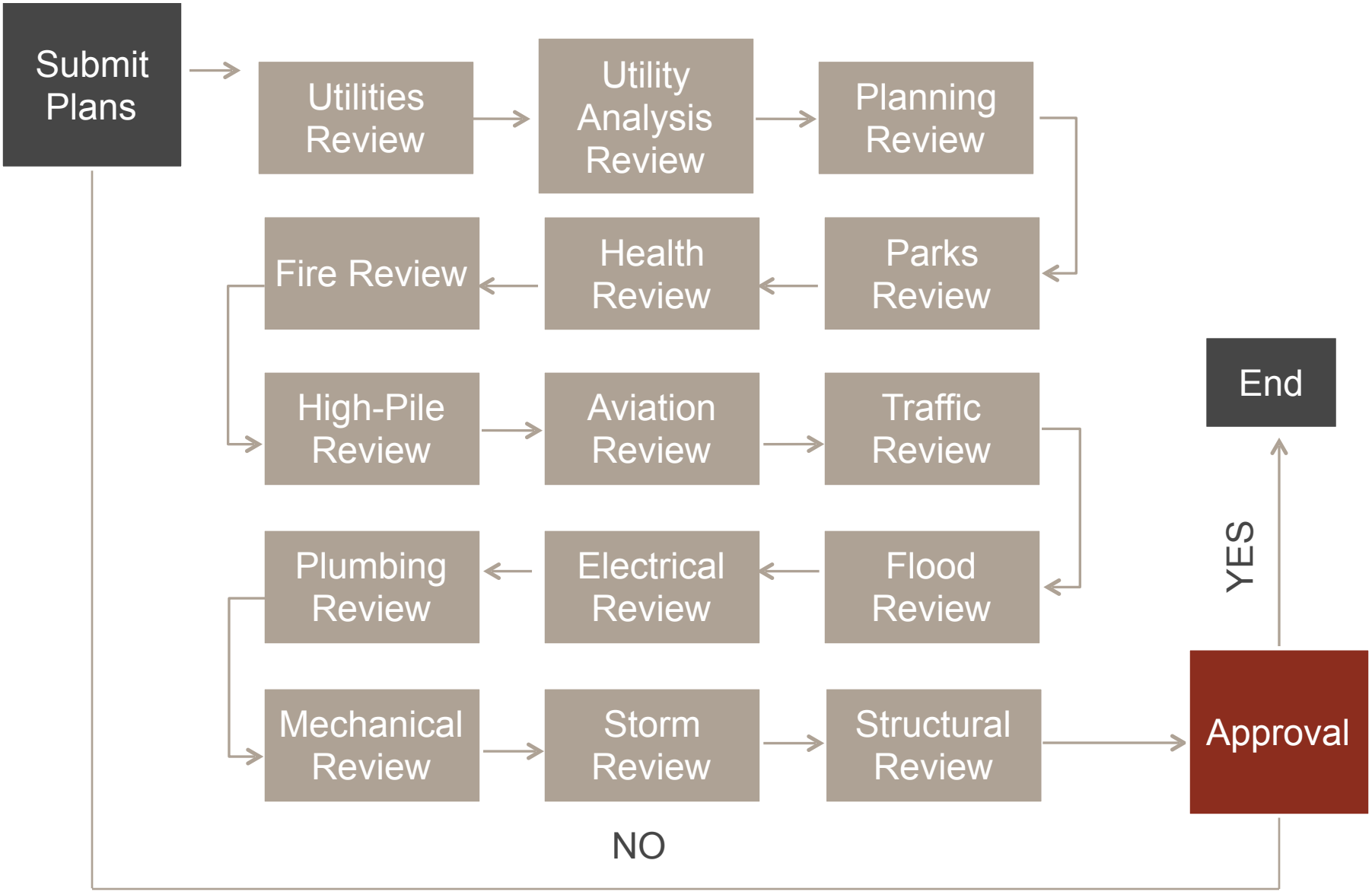
Time to Approval
Average number of review cycles to receive plan approval (last 90 days)

Project Valuation	New Construction	Remodel
$0-$200K	2.7	1.8
$201K-$999K	4.1	2.8
$1M-$4.9M	4.2	2.8
$5M and Up	4.4	3.3

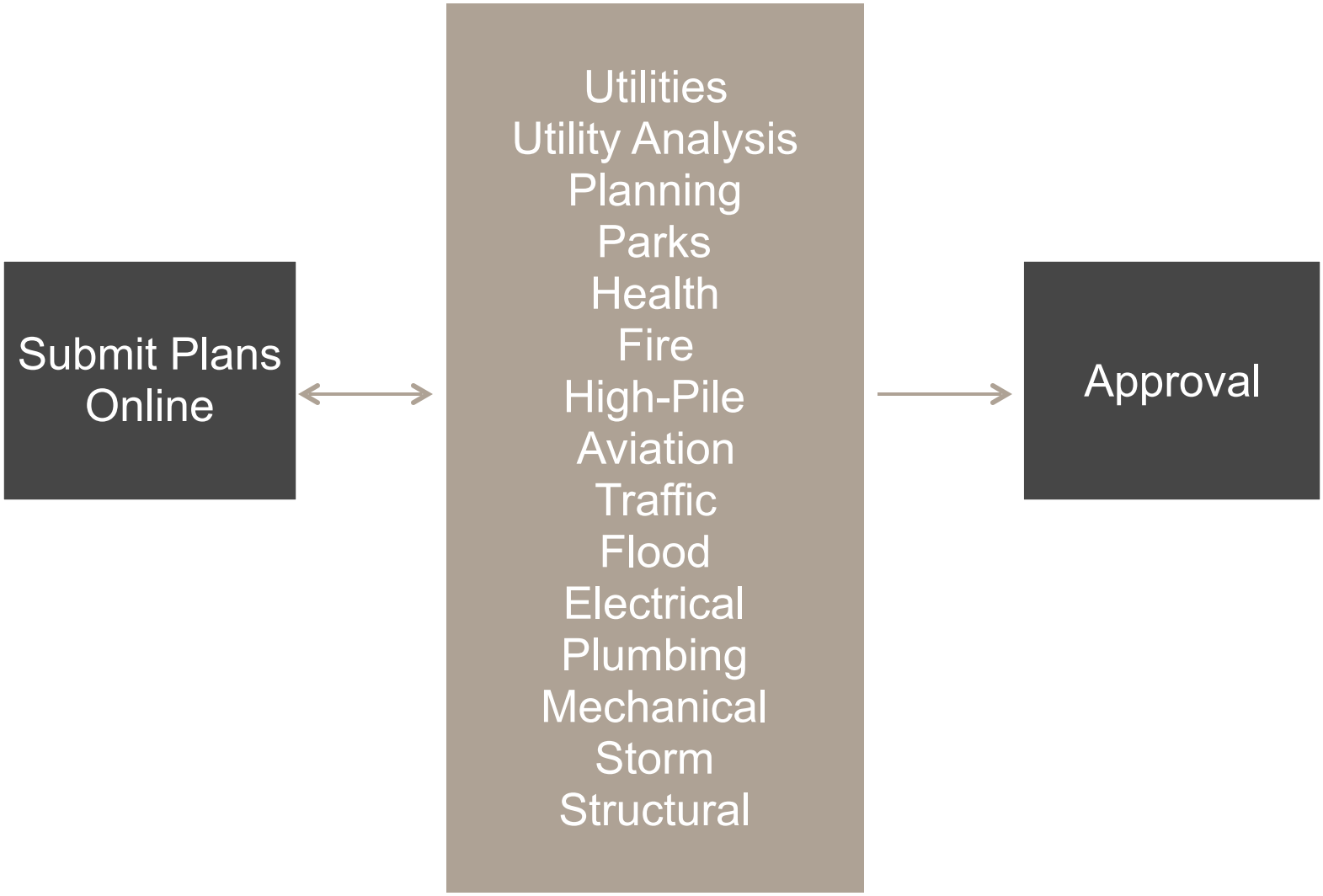
Introducing:

EPR

Traditional Process



Electronic Process



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Service Types

- Commercial Construction
- Residential Construction
- Infrastructure Projects
- Sign Installations

Our goal is to reach full participation in electronic plan submittals from the City's construction customers.

20%

Twenty percent of plans are currently submitted electronically.

Benefits

- Concurrent review among disciplines
- Quicker turnaround for resubmittals
- Accessible 24/7
- No need to visit the HPC
- Saves resources
- Enhanced collaboration
- Communication features
- Reporting and tracking tools

hpceservices.org

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Official Site for Houston, Texas

CITY OF HOUSTON | PUBLIC WORKS HOME | HOUSTON PERMITTING CENTER

Welcome to the Houston Permitting Center's eServices Web Portal

HOUSTON PERMITTING center
eSERVICES

Convenience with a click!

eSERVICES is the Houston Permitting Center's self-service portal—designed to make it easier for you to achieve your goals while complying with the City's regulations.

Click on the tabs below to learn about our available eServices. More convenient self-service options will be added in the near future as we continue working to improve your customer experience.

NOW AVAILABLE: Electronic Plan Review

Electronic Plan Review (EPR) is currently available for:

- Residential building construction projects (except One-Stop)
- Commercial building construction projects (except One-Stop)
- Projects within the City's right-of-way or tying to City utilities (Office of the City Engineer)

Use of EPR is voluntary, but a project must be submitted entirely online or entirely by paper. The two submission methods cannot be mixed.

Two online systems — **iPermits** and **ProjectDox** — are used to complete specific functions in the plan review process. Separate logins are required for each system; however, the same email address and password may be used to set up each system account.

- iPermits Portal
- Online Queuing Service
- ProjectDox Portal
- eServices Support

Resources

- Commercial EPR User Guide
- Office of the City Engineer EPR User Guide
- ProjectDox Installation Guide
- Residential EPR User Guide

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- Office of the City Engineer EPR User Guide
- ProjectDox Installation Guide
- Residential EPR User Guide

Quick Links

- iPermits Portal
- ProjectDox Portal
- Online Permits Website
- Customer Satisfaction Survey

August 2016

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

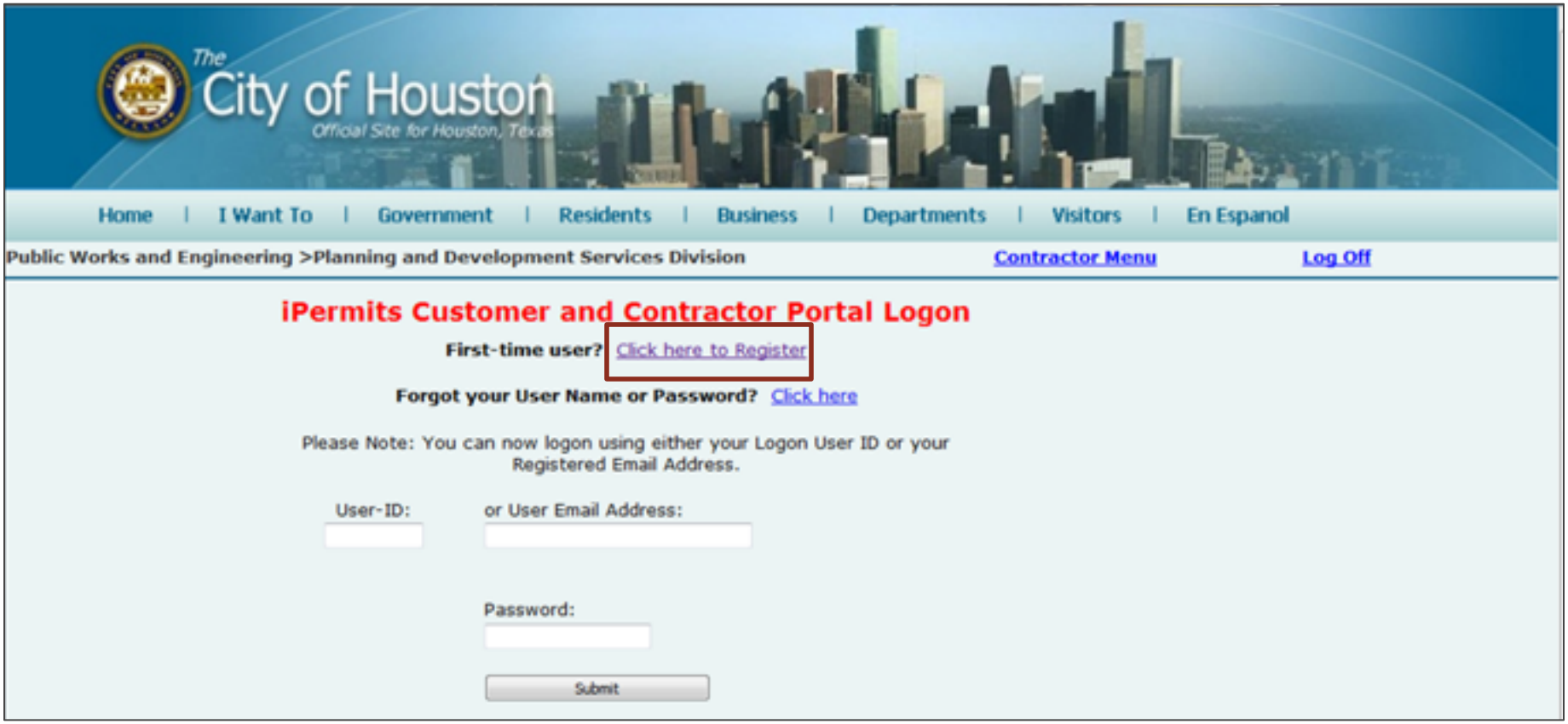
EPR Workshop- All Plan Types

August 25, 2016 at 9:00 AM

Houston Permitting Center, Training Room B1 - 1002 Washington Avenue - Houston, Texas 77002

Register Now!

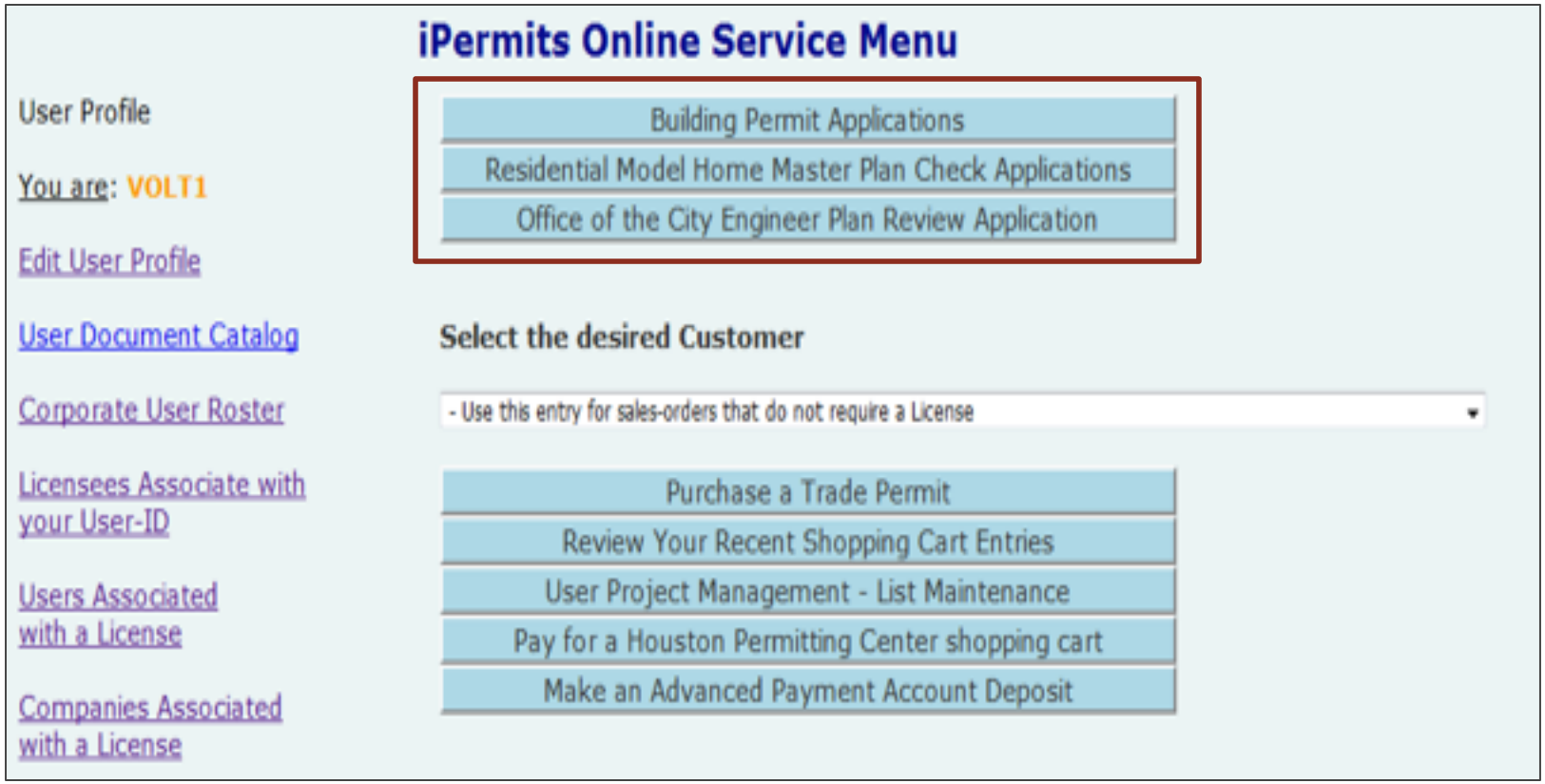
Create iPermits Account



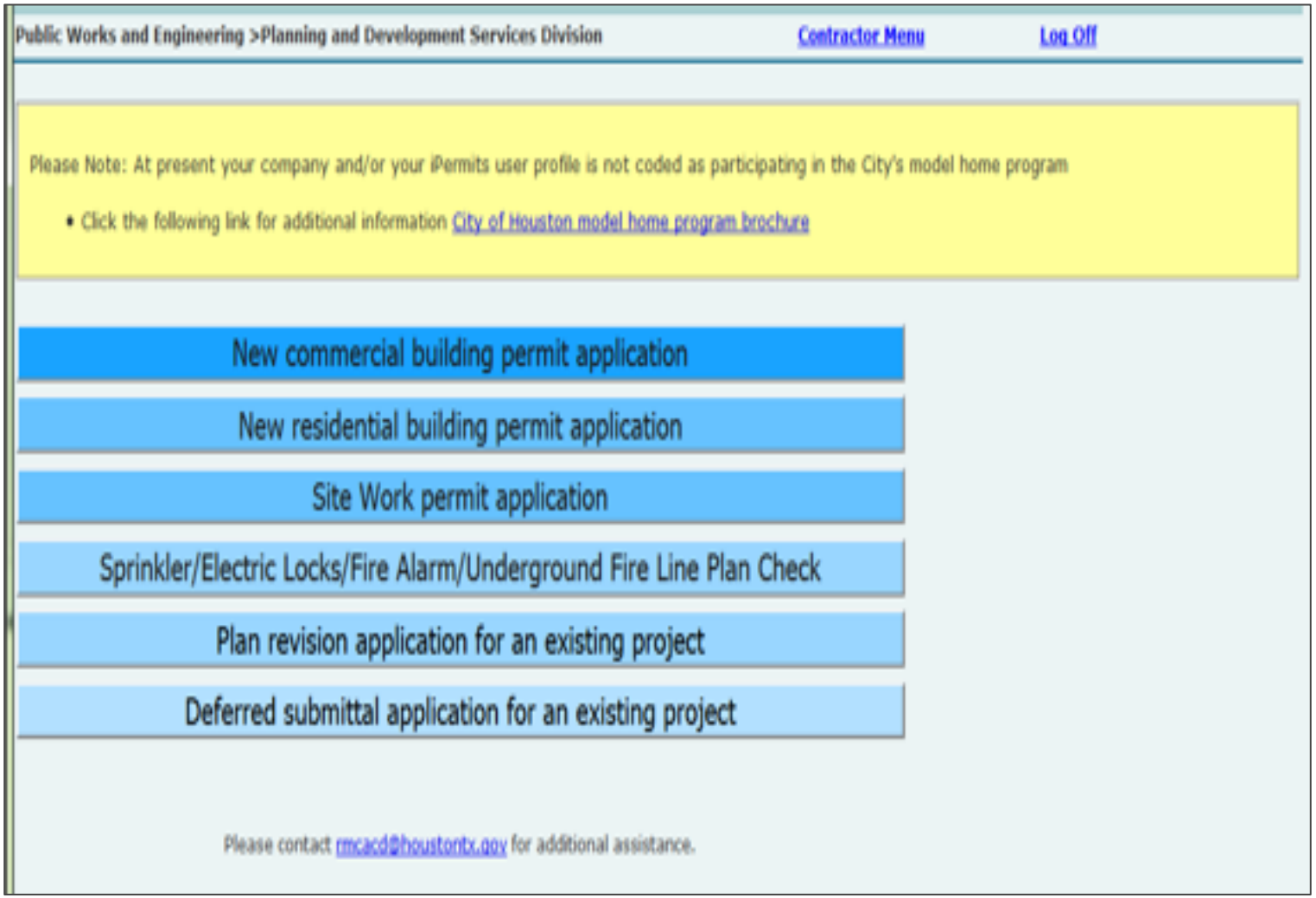
Create iPermits Account

- Account types for:
  - Licensed contractors
  - Engineering firms (Office of the City Engineer plans only)
  - Advanced payment account holders
  - Non-licensed users

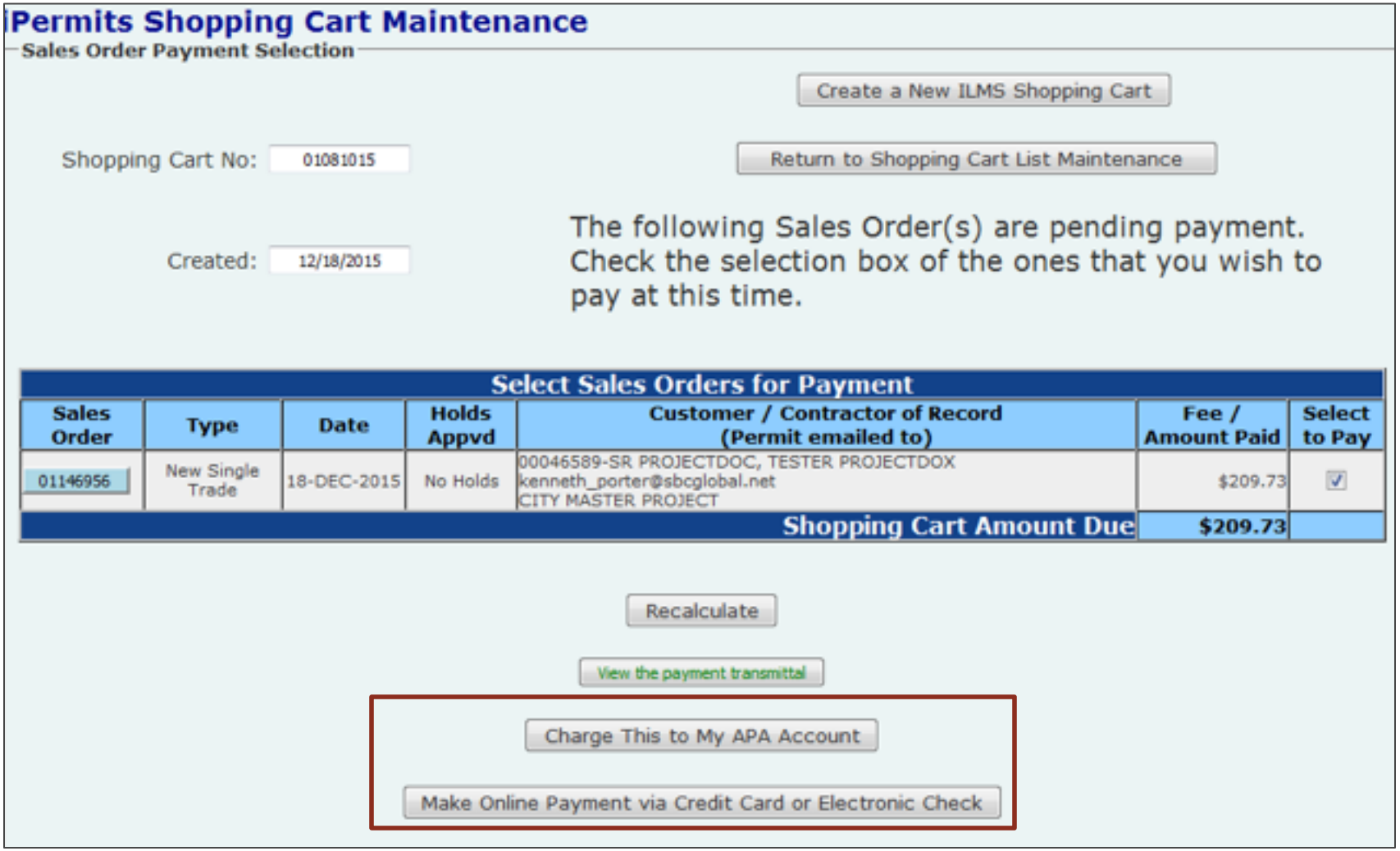
Submit an Application



Submit an Application

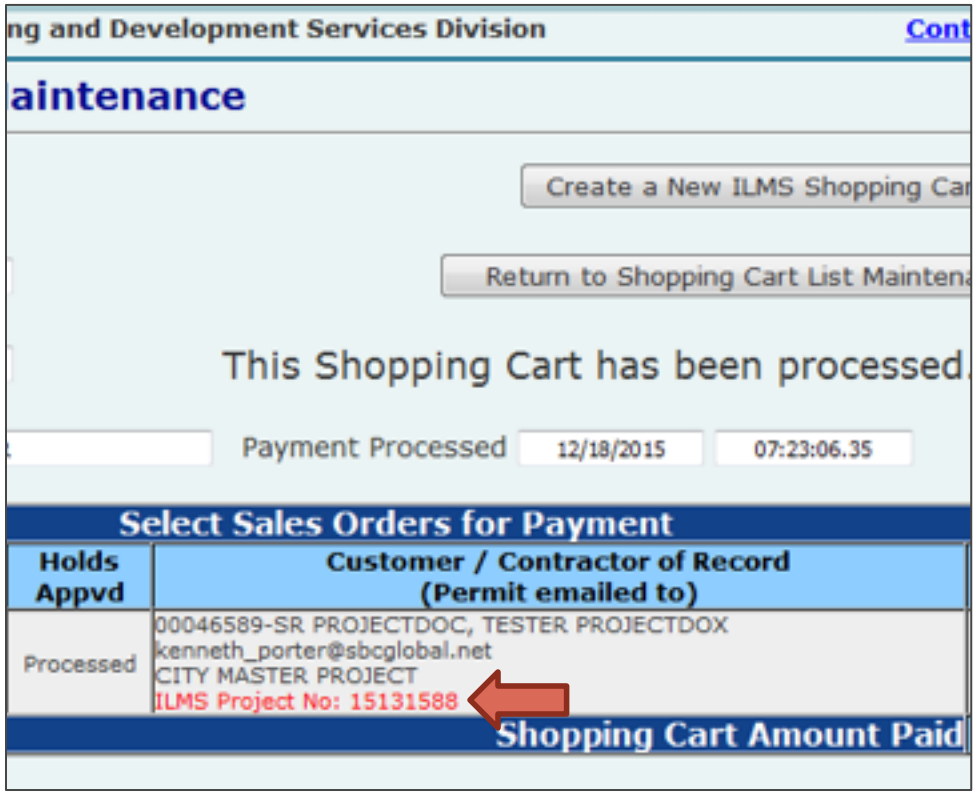


Make a Payment



Payment Complete

- No convenience fee for an APA payment
- $1 convenience fee for eCheck
- Sliding scale fee for credit/debit card
  - American Express not accepted online



ProjectDox Invitation

- Short cut to user guide, system settings and login page
- Temporary password for new users

Invitation to Join City of Houston Electronic Plan Review System

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Dear Applicant:

You are receiving this email from the City of Houston Building Code Enforcement in response to the Commercial Building Permit application for project Project No or you have been invited into the project by the applicant Applicant's Name. Your Project has been created in the ProjectDox system to allow you to upload drawings and documents for review. The ProjectDox system also allows you to check the status of the plan review and departments review comments in real time.

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 the ProjectDox system, click on the Project Access Link and enter the following user name and temporary password:

User name: Your Email Address
Temporary password: Temp Password

After logging in for the first time, you will be asked to create your permanent password and complete your User Profile. We recommend that first-time users review the Commercial User Guide before uploading drawings and documents.

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

Project Number:	**Your Project No**
Applicant Name:	**Your Name**
Applicant Email Address:	**Your Email Address**

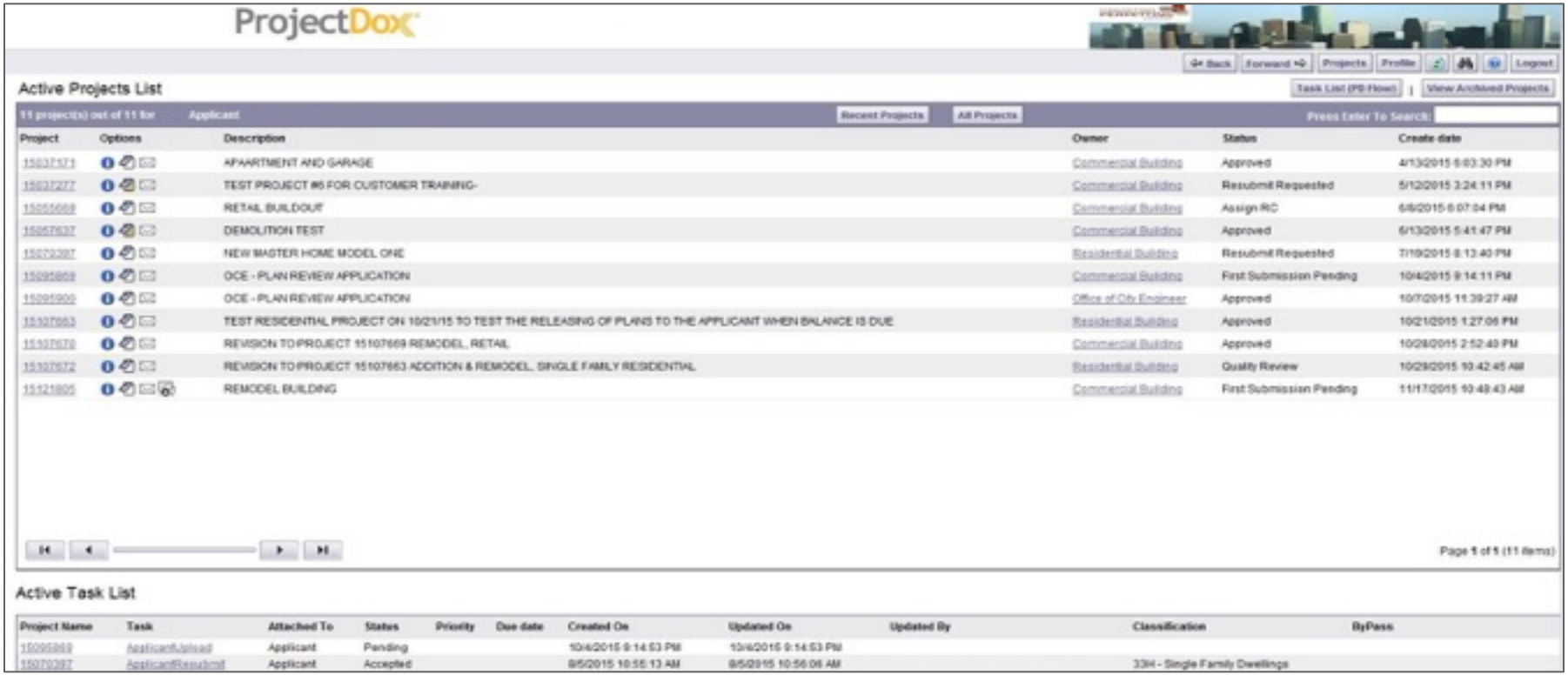
To access your plan review project, please follow the instructions indicated below;

Uploading Your Files

Login Page

The City of Houston
Official Site for Houston, Texas
HOUSTON PERMITTING center
eSERVICES
Enter your e-mail address and password to continue.
E-mail:
Password:
Login
Forgot your password?
ProjectDox
© 2015 Avolve Software.
ProjectDox (Version 8.3) is a trademark of Avolve Software. All rights reserved.
avolve software
Commercial User Guide
Residential User Guide
OCE User Guide
User PC Settings
Install ProjectDox Components
To create a desktop shortcut, click and drag the icon below to your desktop.
Click here to add ProjectDox 8.3.8.2 to your Favorites.

Home Page


ProjectDox
Back
Forward
Projects
Profile
Logout
Active Projects List
Task List (PD Flow)
View Archived Projects
11 project(s) out of 11 for Applicant
Recent Projects
All Projects
Press Enter To Search:
Project
Options
Description
Owner
Status
Create date
15037171 APARTMENT AND GARAGE Commercial Building Approved 4/13/2015 6:03:30 PM
15037277 TEST PROJECT #6 FOR CUSTOMER TRAINING- Commercial Building Resubmit Requested 5/12/2015 3:24:11 PM
15055069 RETAIL BUILDOUT Commercial Building Assign RC 6/8/2015 6:07:04 PM
15057637 DEMOLITION TEST Commercial Building Approved 6/13/2015 5:41:47 PM
15072397 NEW MASTER HOME MODEL ONE Residential Building Resubmit Requested 7/19/2015 8:13:40 PM
15095869 OCE - PLAN REVIEW APPLICATION Commercial Building First Submission Pending 10/4/2015 9:14:11 PM
15095900 OCE - PLAN REVIEW APPLICATION Office of City Engineer Approved 10/7/2015 11:39:27 AM
15107663 TEST RESIDENTIAL PROJECT ON 10/21/15 TO TEST THE RELEASING OF PLANS TO THE APPLICANT WHEN BALANCE IS DUE Residential Building Approved 10/21/2015 1:27:06 PM
15107669 REVISION TO PROJECT 15107669 REMODEL, RETAIL Commercial Building Approved 10/28/2015 2:52:40 PM
15107672 REVISION TO PROJECT 15107663 ADDITION & REMODEL, SINGLE FAMILY RESIDENTIAL Residential Building Quality Review 10/29/2015 10:42:45 AM
15121805 REMODEL BUILDING Commercial Building First Submission Pending 11/17/2015 10:48:43 AM
Page 1 of 1 (11 items)
Active Task List
Project Name
Task
Attached To
Status
Priority
Due date
Created On
Updated On
Updated By
Classification
ByPass
15095869 ApplicantUpload Applicant Pending 10/4/2015 9:14:53 PM 10/4/2015 9:14:53 PM
15070397 ApplicantResubmit Applicant Accepted 8/5/2015 10:55:13 AM 8/5/2015 10:56:06 AM 33H - Single Family Dwellings

File Standards

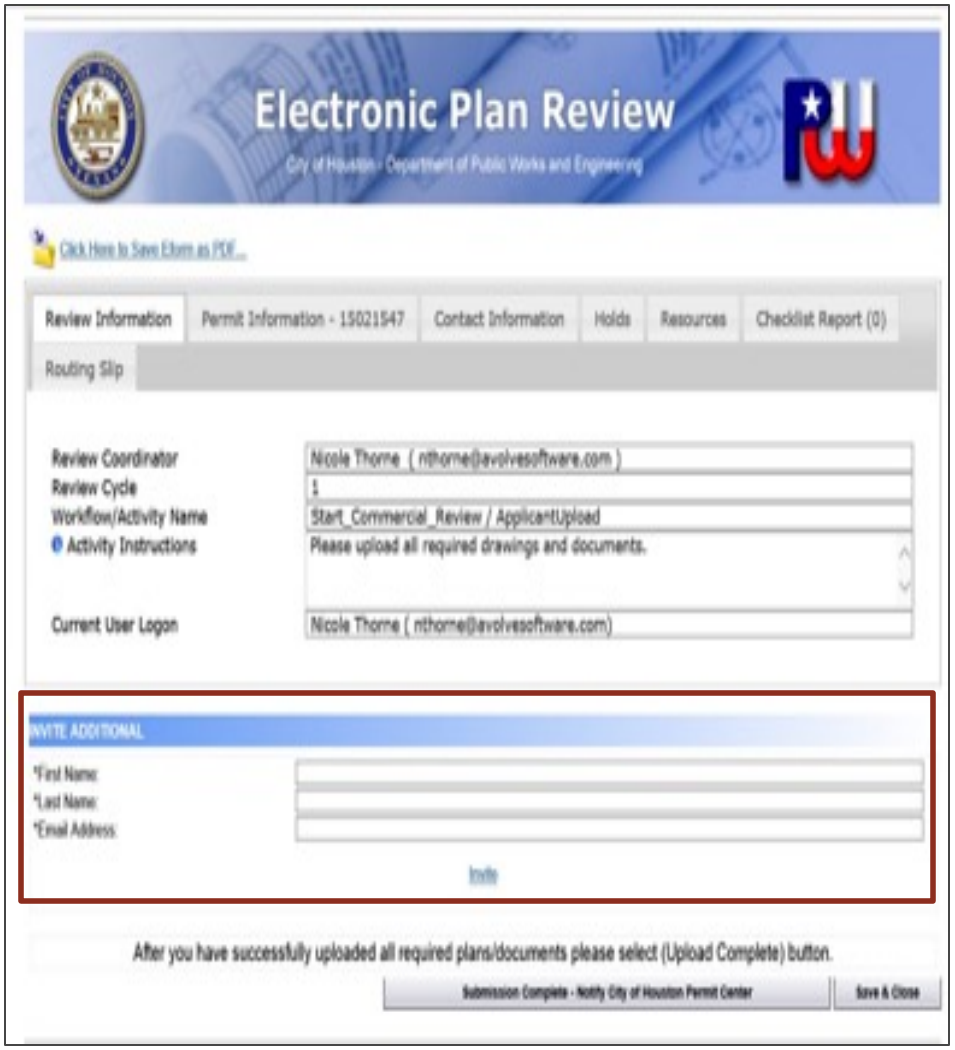
- Submit **drawings** as *single-page files* in landscape mode
- Submit **documents** as *multi-page* files
- Follow required naming conventions for the plan type
- File names limited to 70 characters

First Submission

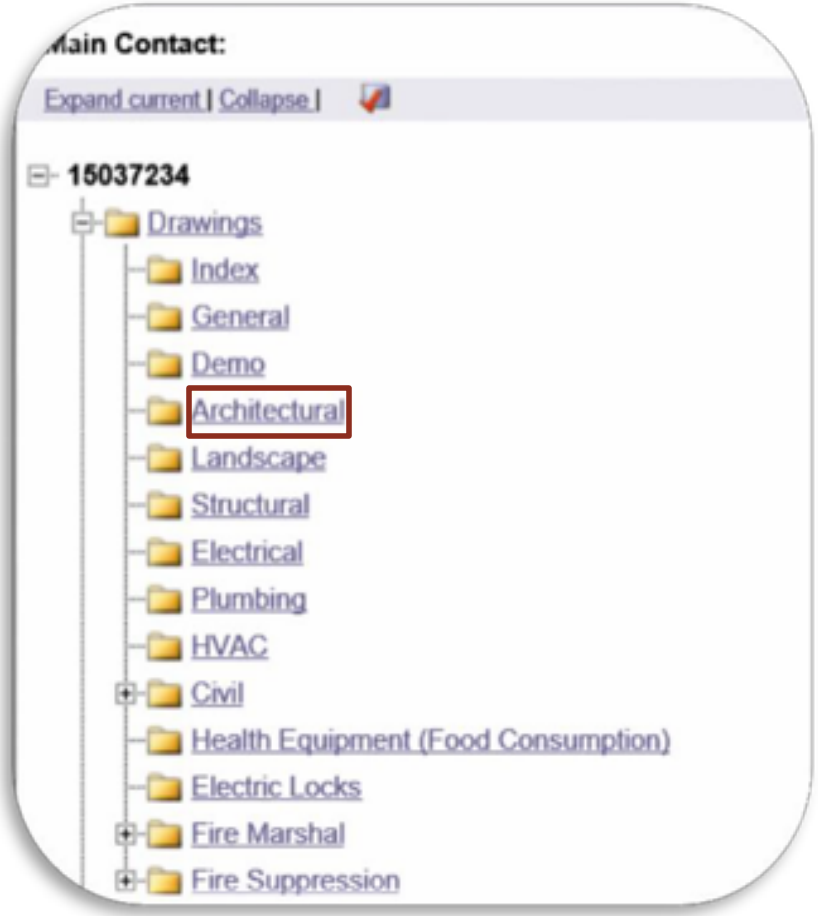
- Click on the ***Project Name*** link to navigate to the folders to upload the files yourself
- Click on the ***Task*** link to navigate to the eForm to invite other users to upload the files

Invite Users

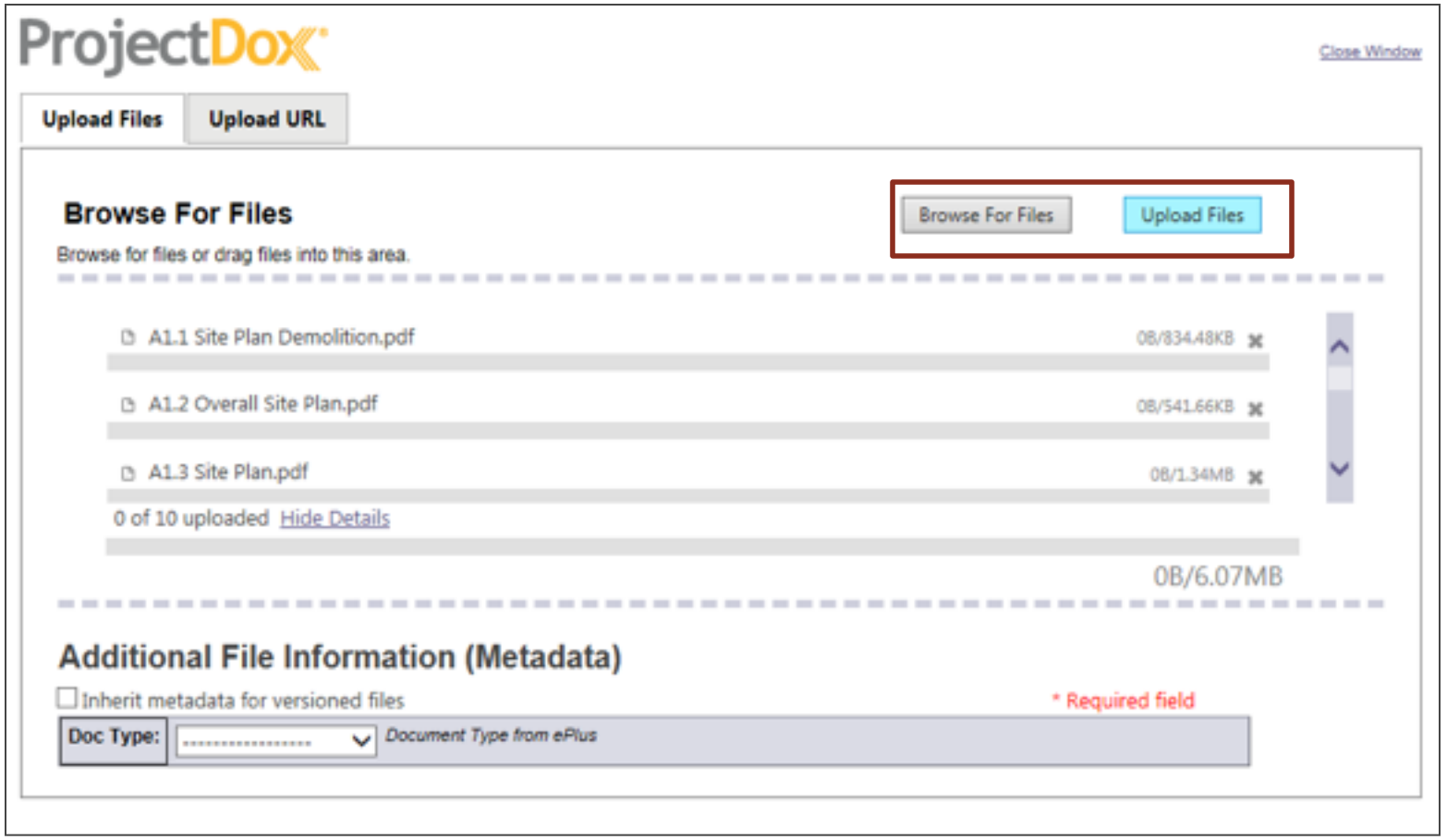
- Only available when main applicant is assigned a task
- Invitations are per project
- Invited users cannot be uninvited



Select a Folder



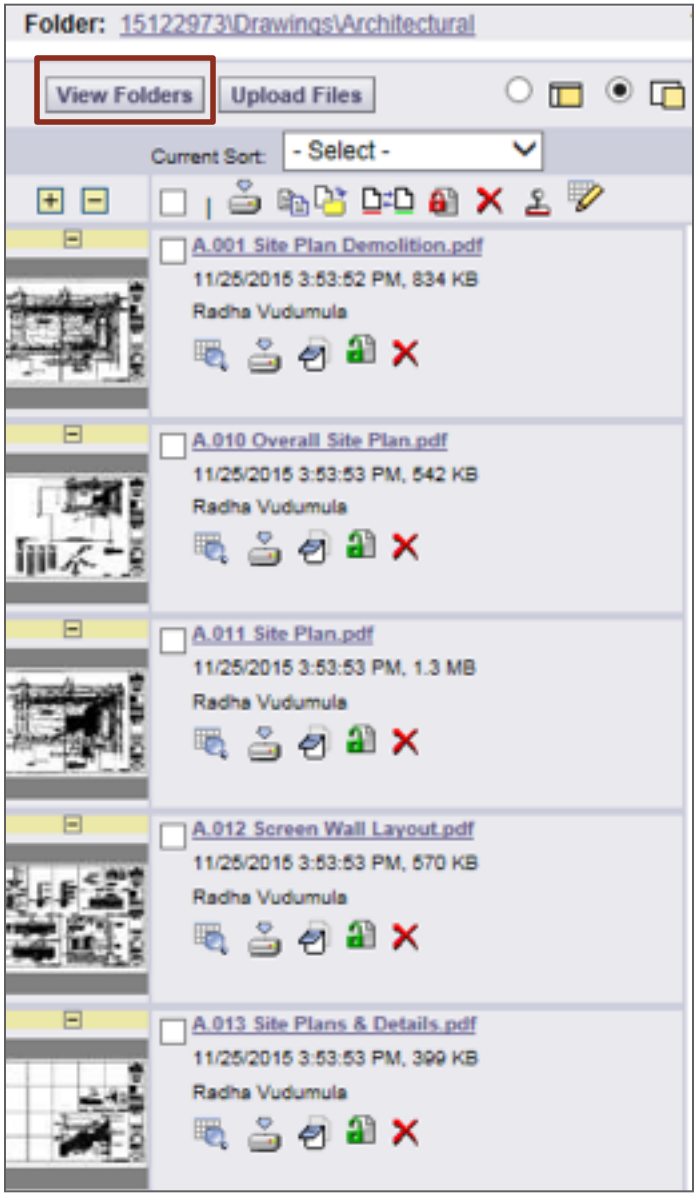
Upload Files



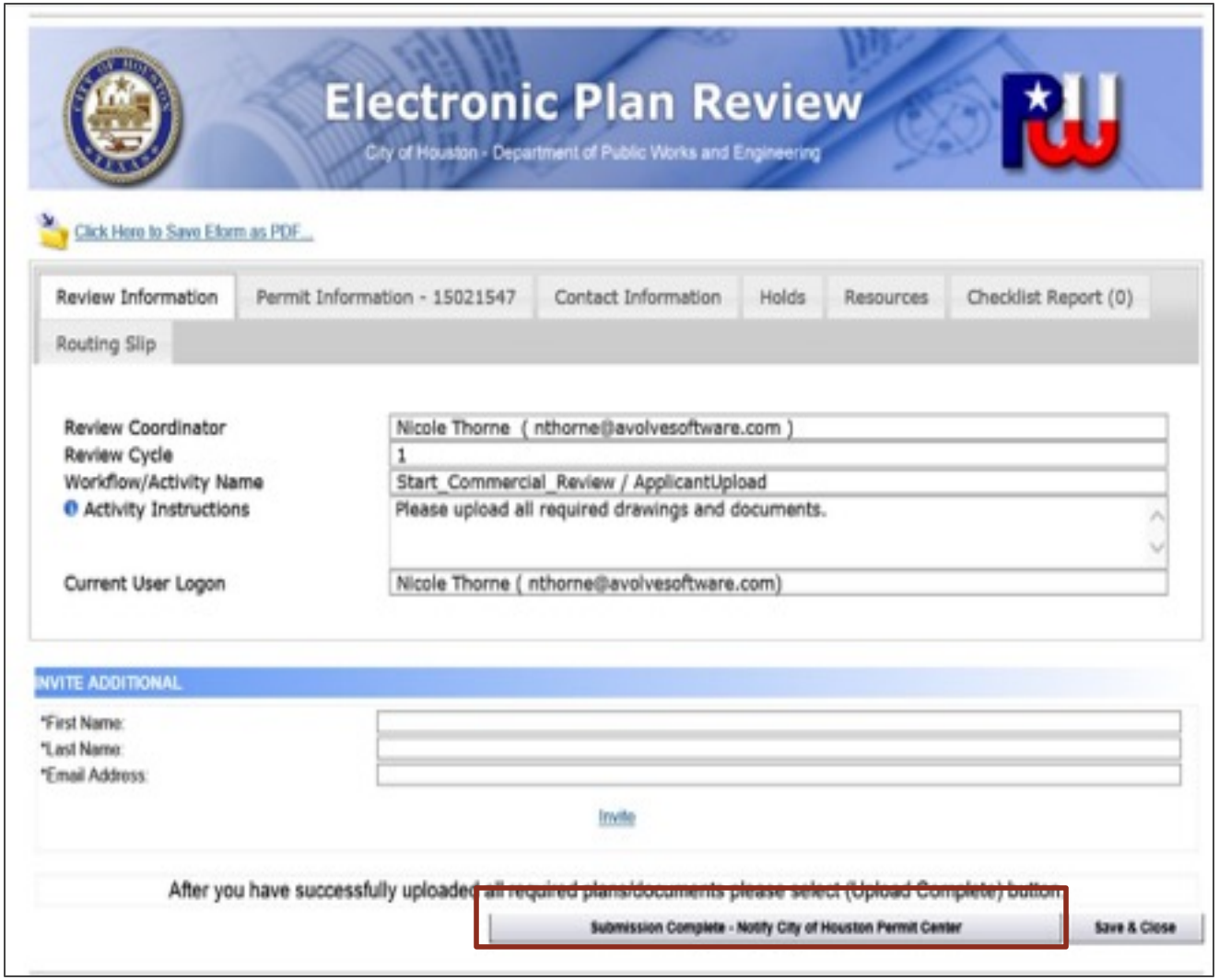
Maximum of 200 files or 1 GB per upload

Upload Files

- Do not need to wait for thumbnails to render to upload to another folder
- The delete feature is only available to the main applicant when assigned a task



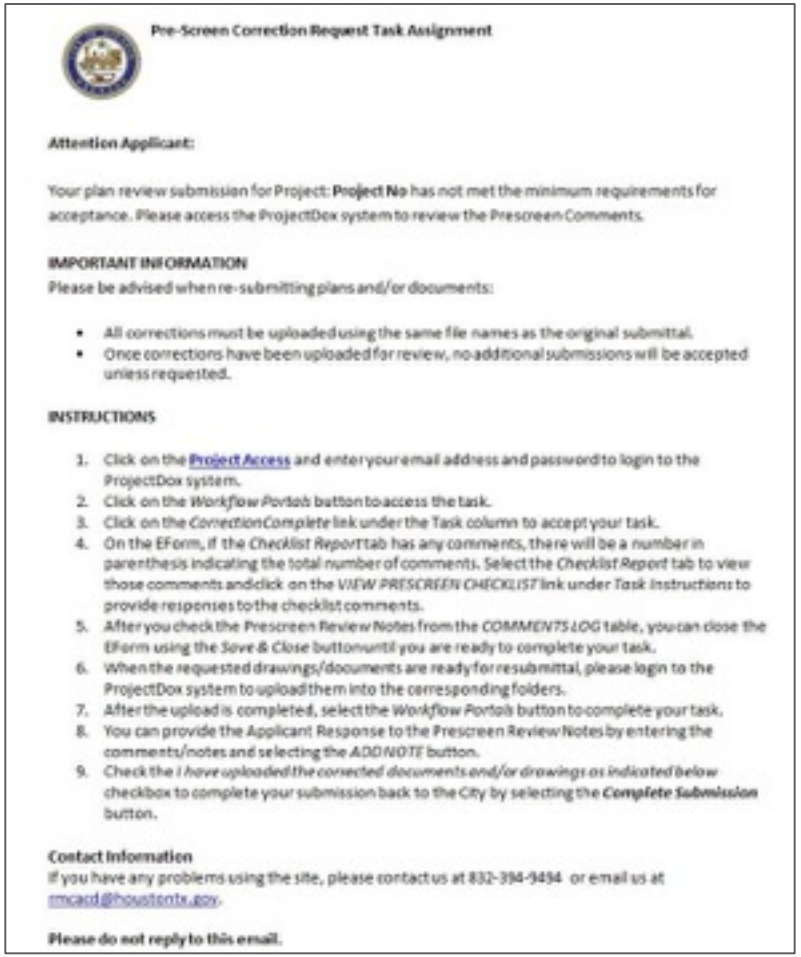
Complete Assigned Task



The City will be notified to begin its review once the task is completed.

Corrections Required

1. Open the eForm to review, respond to, or export comments and changemarks
2. Upload the corrected files with the *original file names*
3. Complete the assigned task



Pre-Screen Correction Request Task Assignment

Attention Applicant:

Your plan review submission for Project: **Project No** has not met the minimum requirements for acceptance. Please access the ProjectDox system to review the Prescreen Comments.

IMPORTANT INFORMATION

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

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

INSTRUCTIONS

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

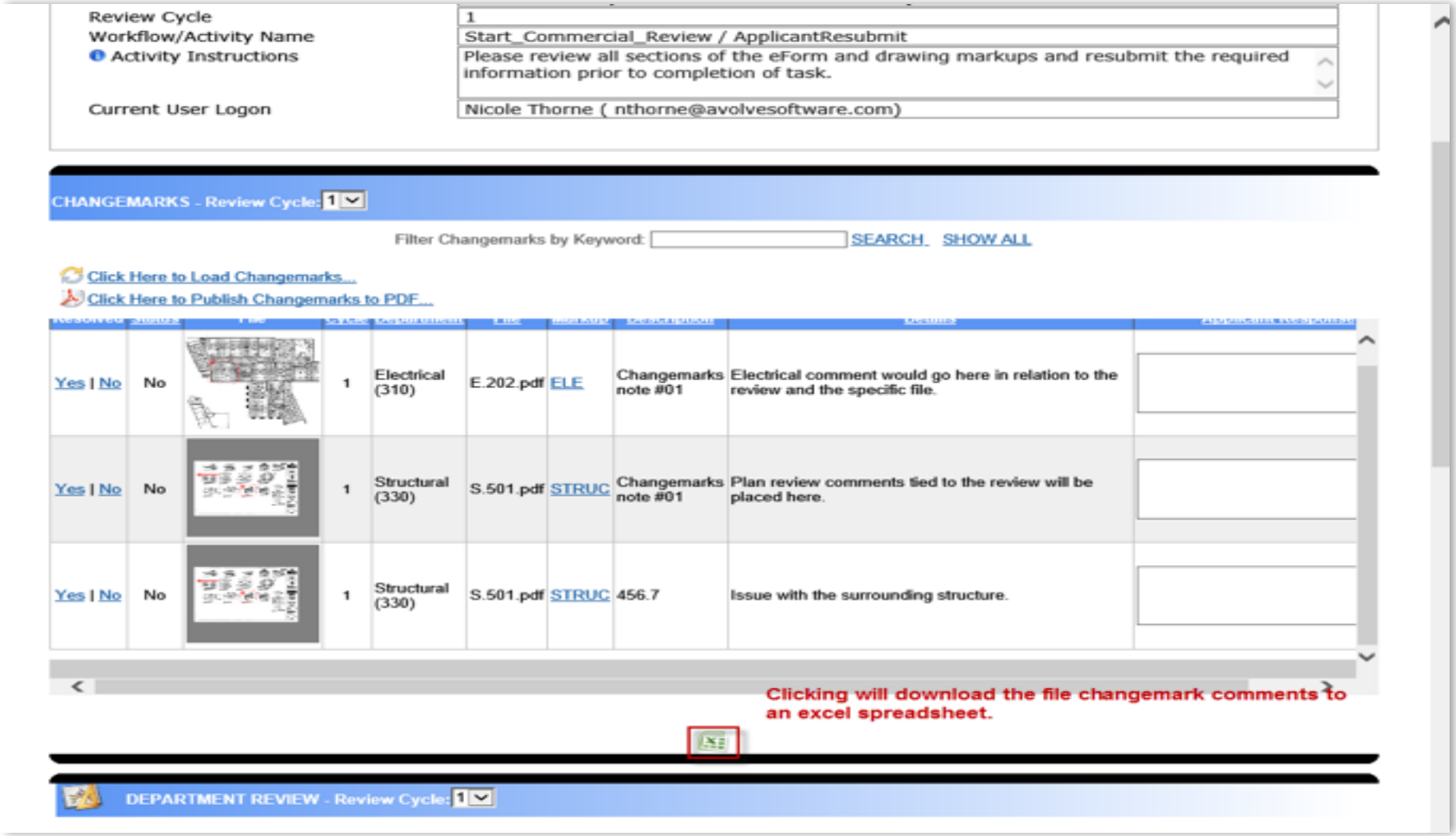
Contact Information

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

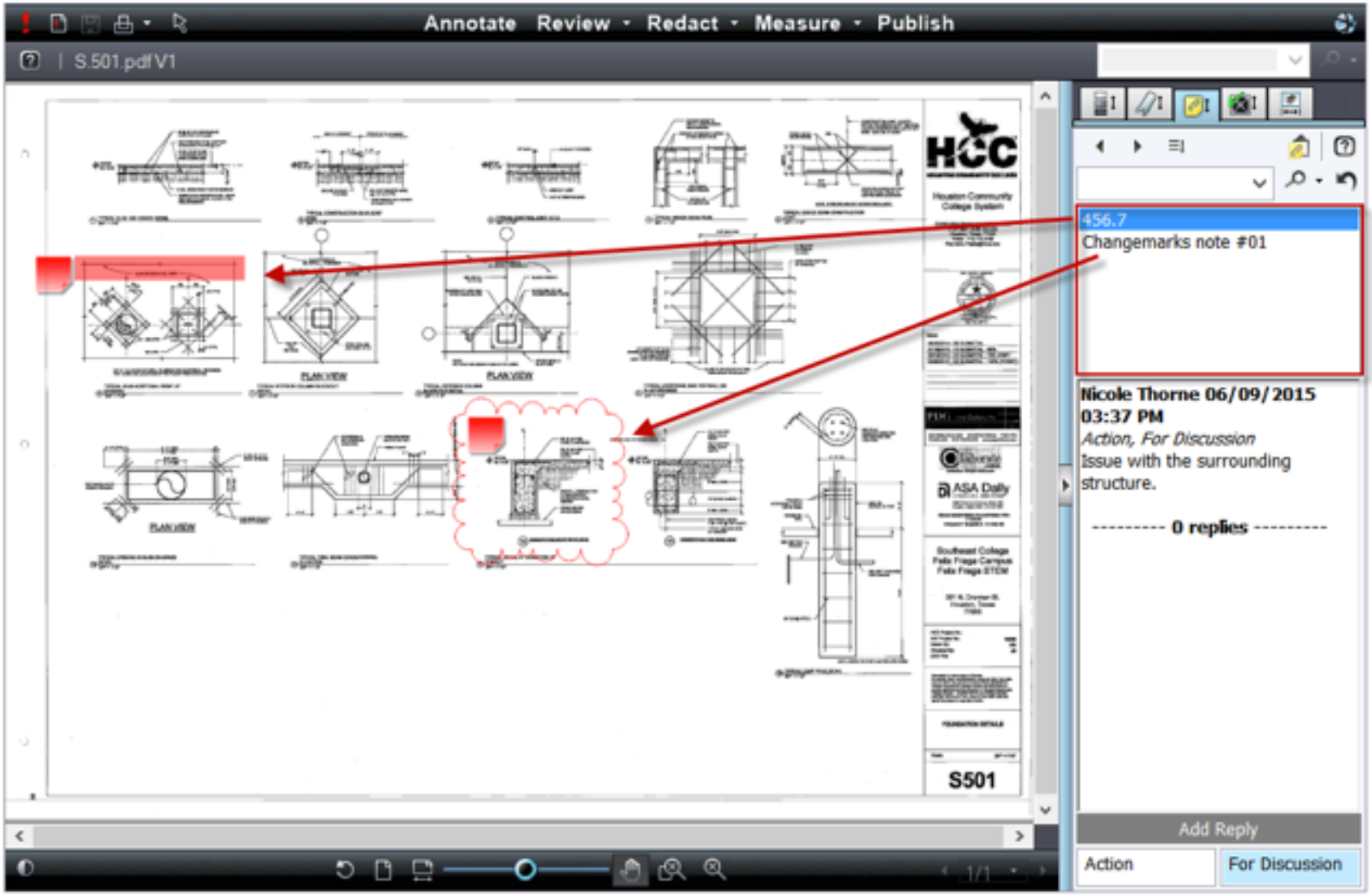
Please do not reply to this email.

Checklist Report

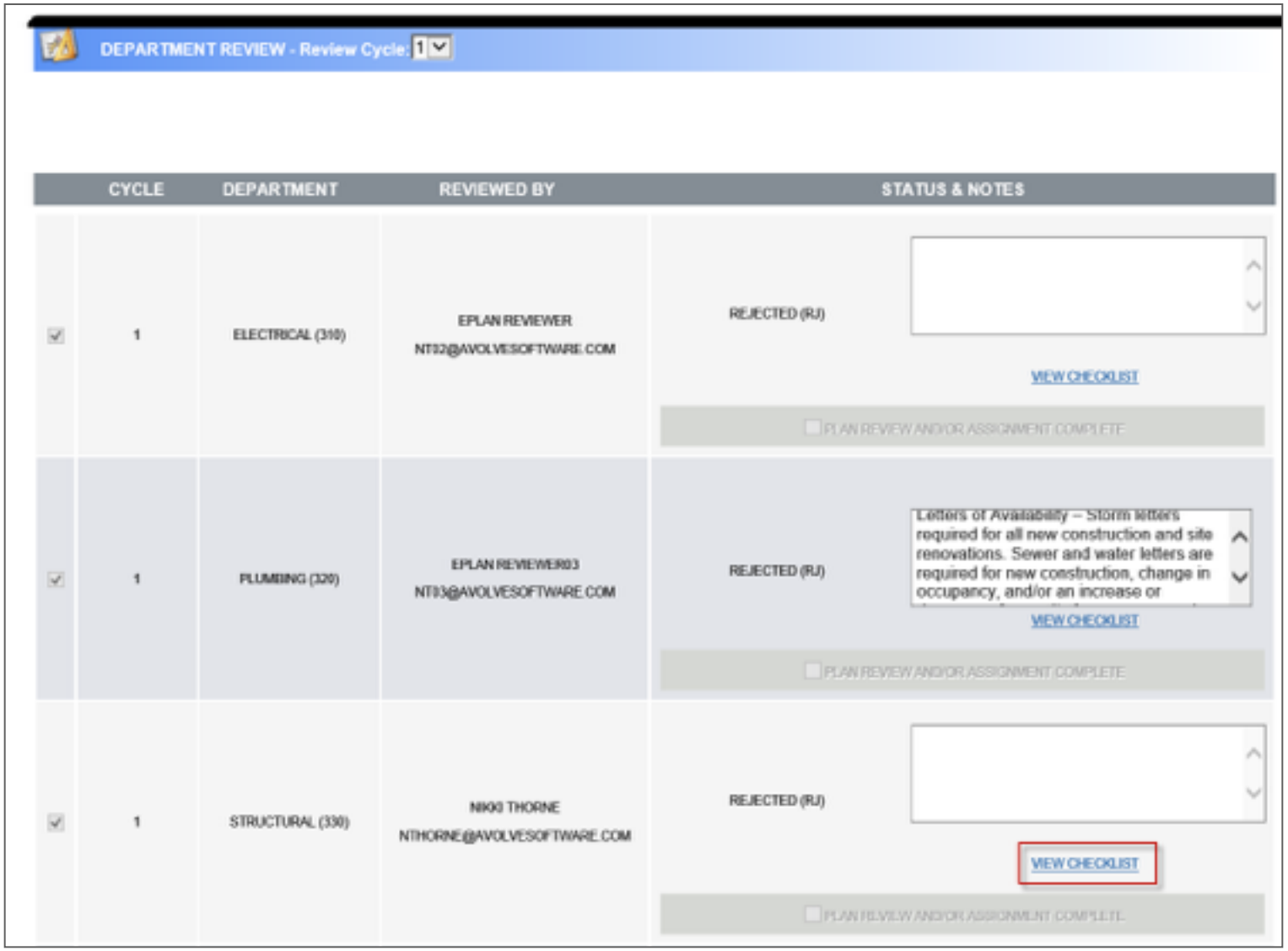
Changemarks



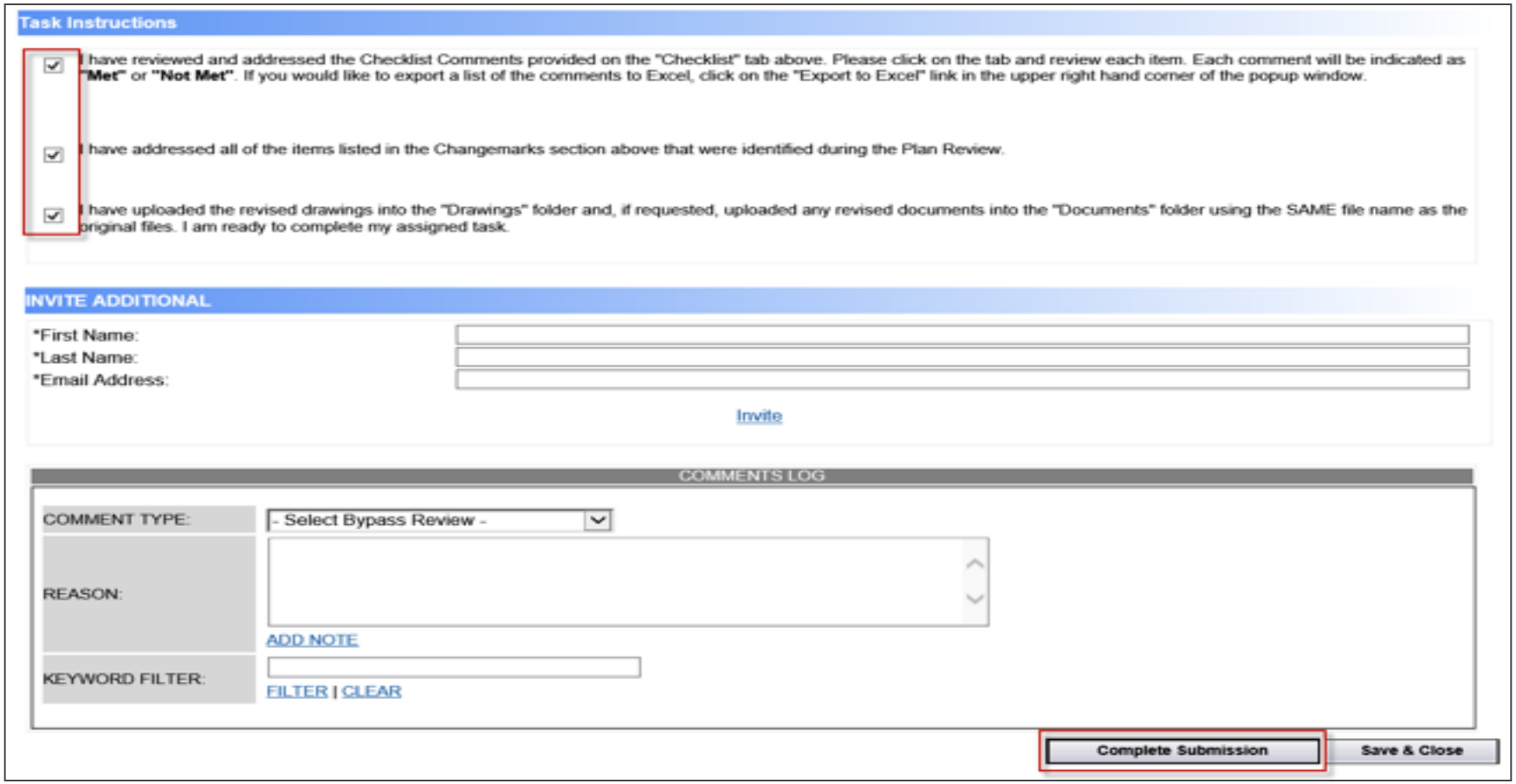
Changemarks



Department Comments

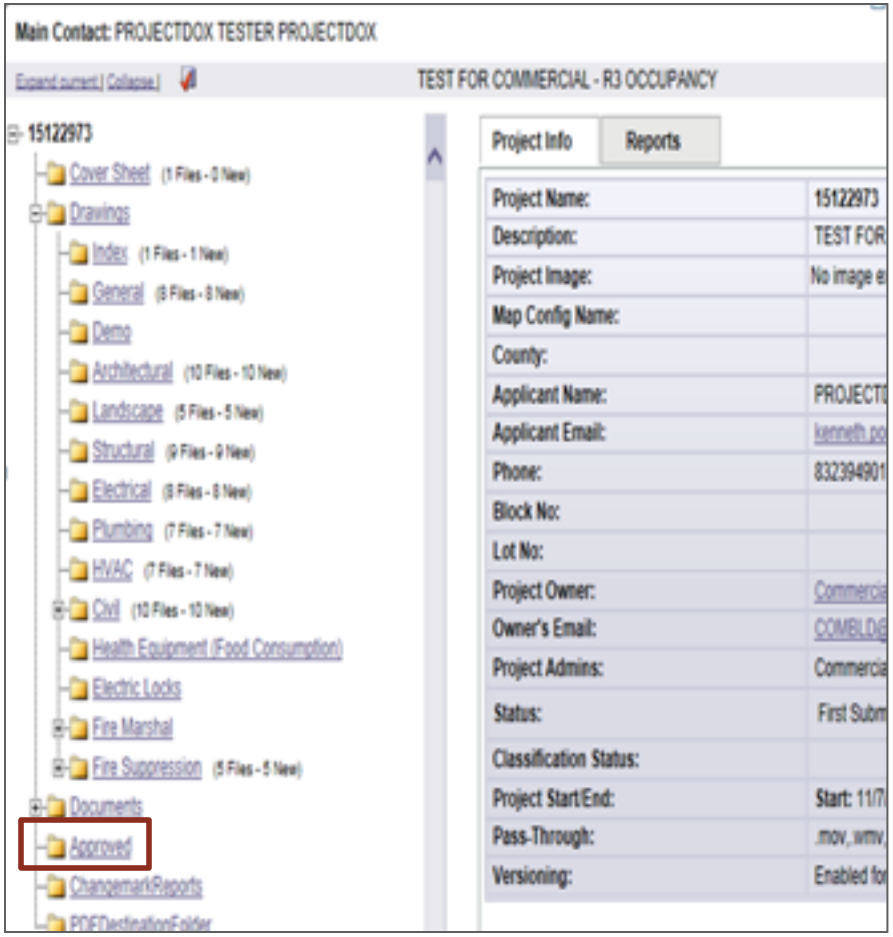


Complete Assigned Task

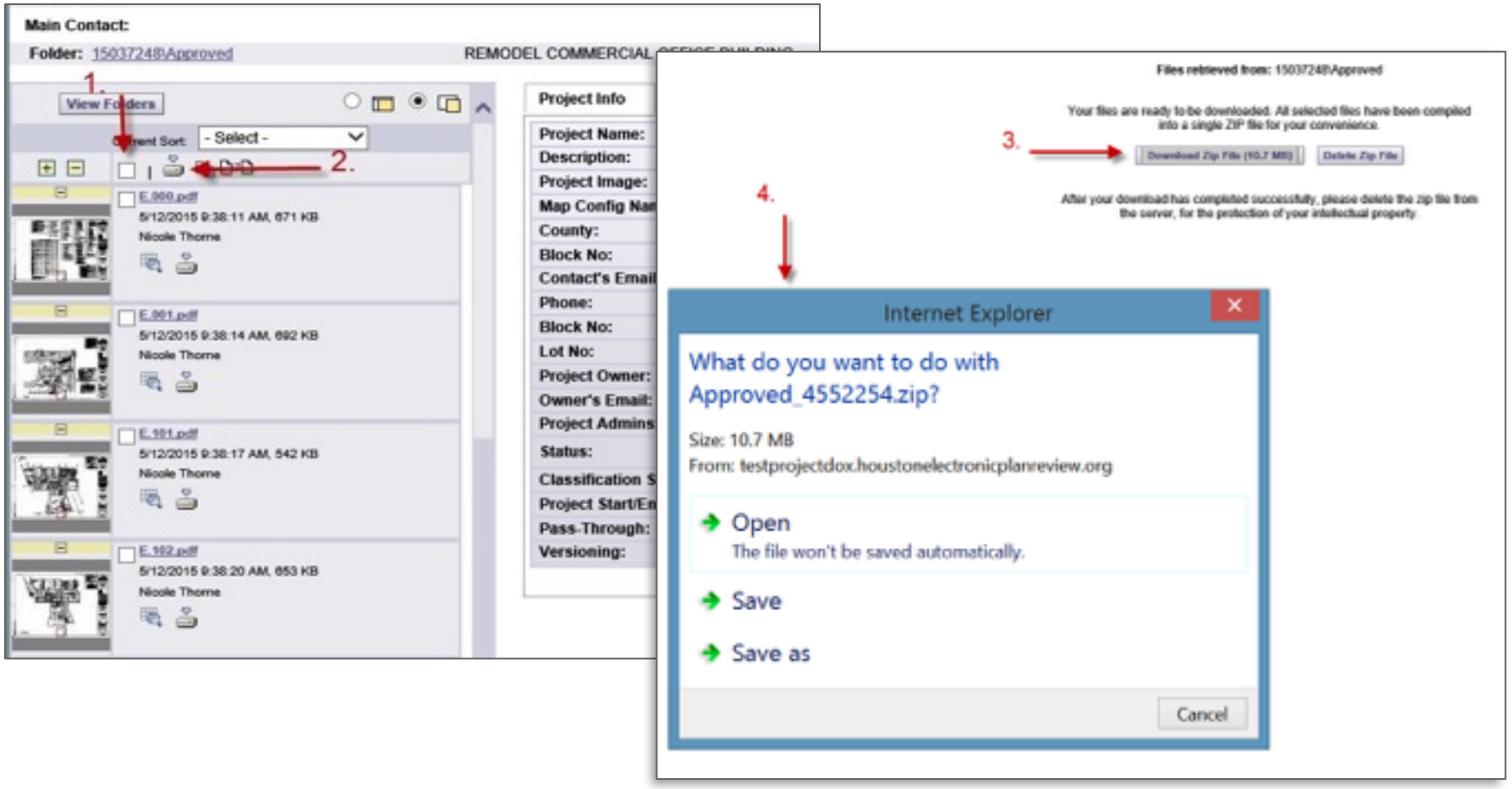


Download Approved Plans

- Might be required to pay remaining fees before given access to the Approved folder



Download Approved Plans



Training & Help

Live Chat

- Assistance through online messaging
- Available during regular business hours

Training & Help

Workshops

- Instructor-led practice with ProjectDox at the HPC
- Online registration

Next offerings:

Monday, Sept. 12 | 2-3:30 pm
Thursday, Sept. 29 | 9-10:30 am

A look ahead...

- Focus groups
- Streamlined application process
- User profile improvements
- New web portal

HOUSTON PERMITTING center

eSERVICES

houstonpermittingcenter.org