Addendum Checklist

In Preconstruction, when an addendum is required, follow these steps. Remember that, unlike PES/Client server where all addenda information was separated from the projects, all addendum detail is to be placed on the appropriate Project and Category. When the Contracts Administration Office (Central or District) has placed the proposal in Addenda Phase and opened an Addendum your role will have access to the proposal and project(s).

For Maintenance Users you must use a role that has Post Estimation in its Title or an Estimator Role if you have it. For Transportation Development users, your regular role will function.

- Click the link for the proposal and you will be at the Proposal General tab. This is a good time to run the **Proposal Sections and Line Numbers Report if you are to add pay items**.
  - o On the right end of the blue banner containing the Proposal Id, click on the white triangle for the "Actions Menu".
  - o Under the heading of "Tasks", click on the link for 'Proposal Section and Line Numbers Report'.
  - o The screen may blink a couple of times then on the right end of the blue banner click on the label "Execute".
  - o A WebGate screen will appear with your Proposal Id highlighted. Choose a report format of Excel, PDF, or HTML.   Your report will appear.
  - o Print or save your report.

- Click on the "Projects" tab.
- Click on the link for the appropriate Project.
- The Project General tab will open.

Using one of the means described in the Role Help [Adding and Maintaining Pay Items](#) proceed to add or delete pay items or change item quantities as necessary. Remember that when processing added Pay Items in an addendum you must **assign a Proposal Line Number(s) unique to that Pay Item(s)** in their approximate numerical position in the item list. The section number will be populated by the PrP system when you run the Auto Generate Sections process noted below. Use the Section and Line Number report to find the correct location for these added items. New Proposal Line Numbers should NOT end in 0 or 5. If there is a long list of items to be added, they may need to be inserted both before and after the Proposal Line Number of an existing pay item.

After all changes have been completed and saved, from the Actions Menu:
- Run the process [Auto Generate Sections](#) so that all proposal level changes will be made and be visible to bidders.
- Run the Proposal Addenda Detail and Proposal Addenda Item Detail reports to confirm that all changes are complete and correct.
- Run the Validate Proposal action to ensure that the proposal and all projects remain "valid".

Note: Any Validation Message other than the one below should be brought to the attention of the Estimator; TransDev or Maint Mgr. that submitted the Project(s)/Proposal for review **or** processing by the applicable Contracts Office to determine if correction(s) should be made prior to further actions.

- Proposal 'Proposal ID Here' is valid.
- Project 'Attached Project No. ID(s) Here' is valid.

The CAO staff will close out the addendum and place the Phase back to Advertised. The proposal will no longer be visible to you unless an additional Addendum is required.

NOTE: For proposals involving Design Consultants, run the "Summary of Pay Items Report" (WebGate report) and provide it to the Design Consultant if that consultant does not have access to run the report.