



User Guide

Final Estimate Status

July 3, 2019

Document Control

Version	Change	Made By	Date
0.1	QAR to QC Review Clarification Day(s) in Review	Taylor Carlquist	3/15/19
0.2	Clarification of Dates in SM	Ashley Anderson	4/4/2019
1.0	Application Update	Ashley Anderson	7/3/2019

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Final Estimates Section

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General

The Final Estimate Status application is used by Final Estimates staff to track Quality Control Review (QC Review) findings during construction and during the contract closeout process to track contract status, pay off date, and Post Audit Review (PAR) findings.

Form 700-050-26, Final Interest Payment Log, Form 700-050-28, Final Estimates Office Record of Final Plans and Documents, and the PAR Report are generated in this application.

Access

To access the application, the user must have an Active Directory (AD) Account.

[How do I change my password?](#)

You can change your AD password from the AD login screen. There is a Change Password Link under the Login button.

[How do I reset my password if I've forgotten it?](#)

To reset your AD account, you have two options.

1. Send an email to fdot.servicedesk@dot.state.fl.us request your AD account be reset.
2. You may use the [Hitachi ID Identity And Access Management Tool](#) if you have setup your questions.

Roles

Roles are initially set by the Final Estimates Status system based on user roles in SiteManager/PrC [identified by brackets below]. To edit role, please submit an Automated Access Request Form (AARF).

System Used by System to add new users [SMADMIN]

Admin Full Rights (SCO System Section and State Final Estimates Office) [PrCCenOffAdmin, COFEINQ, SMADMIN]

User Rights to create new contracts and edit all contract information (District Final Estimates Managers) [CND1FE, CND1FEE, CND2FE, CND2FEE, CND3FE, CND3FEE, CND4FE, CND4FEE, CND5FE, CND5FEE, CND6FE, CND6FEE, CND7FE, CND7FEE, CNTPFEE, CNTPFEE]

PAUser Rights to create new contracts and read access to findings (typically Project Administrators and Contract Support Specialists) [PrCRE, PrCRPA, CND1OENG, CND1REOE, CND1RPE, CND2OENG, CND2REOE, CND2RPE, CND3OENG, CND3REOE, CND3ROEP, CND3RPE, CND4OENG, CND4REOE, CND4RPE, CND5OENG, CND5REOE, CND5RPE, CND6OENG, CND6REOE, CND6RPE, CND7OENG, CND7REOE, CND7RPE, CNTPREOE, CNTPRPE]

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Menu

The menu bar is located at the top of the page. This is the primary means of navigation.



You have several options.

- Contracts
 - This is a link to all the contracts in the application.
- Users
 - This is a link to all the users in the application.
- Roles
 - This is a link to role description and groups.
- Code Values
 - This is a link to code descriptions for adjustments and statuses
- Report
 - This is a link to the reports page.
- Help
 - A link to the Help page, where you can find the icon legend, this user manual, and contact information to provide comments/suggestions or to get help with issues.

Search for a Contract

On the contracts tab, enter a Contract ID or Description to search for a contract. Contract list will reduce to entries that meet the criteria entered. Use the Clear button to display all contracts again.



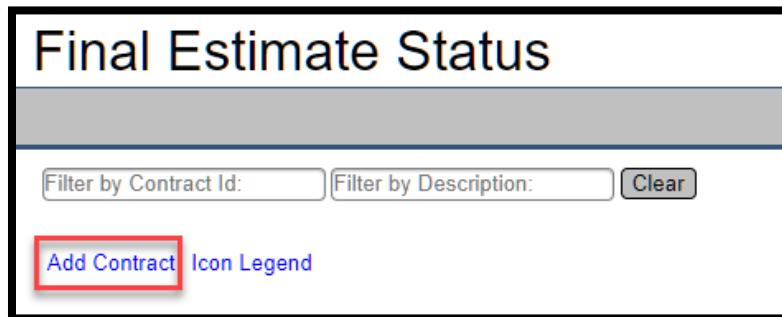
If an entry can't be found, a notification will display.



Add a Contract

This step is the responsibility of the Resident Office to initiate before submittal of the Final Estimates Documentation to the District Final Estimates Office, unless the District created the contract for a QC Review.

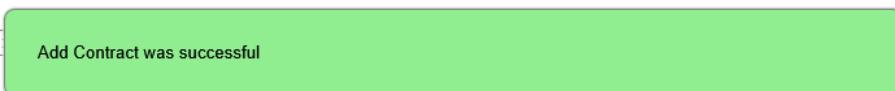
Select Add Contract.



Enter the Contract ID.



Successful entry.



Unsuccessful entry.



Icon Legend

Final Estimate Status

Filter by Contract Id: Filter by Description:

[Add Contract](#) [Icon Legend](#) Icon Legend

District	Contract ID	Contract Type
01	21403	CC FROM AT
01	21575	CC US 17

Icon Legend

Legend

Icon	Title	Description
	Details	View more details about contract.
	Form 700-050-28	View the Final Estimates Office Record of Final Plans and Documents.
	PAR Report	View the PAR Report.
	Form 700-050-26	View the Final Interest Payment Log.
	Validate	Validate the contract.
	Unvalidate	Unvalidate the contract.
	Send to EDMS	Send Form 700-050-28 to EDMS.
	Unlock	Unlock the contract.
	Update	Update record.
T1234	Contract Link	Link to the PSSP contract site.
123456	EDMS Sequence	Link to Form 700-050-28 in EDMS.

Comment or Suggestions
If you have any comments or suggestions concerning this application, please send an email to CO-FinalEstimateSection@dot.state.fl.us

Issues
If you have any issues with this application, please submit a ticket at <https://scos.fdot.gov/>.

Contract Header

Most dates shown in the contract header are populated from the Key Dates in SiteManager in real-time. Others are calculated as indicated in the Explanation of Dates below. Names formatted as *LastName*,

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FirstName come from SiteManager and names formatted as *FirstName LastName* come from Active Directory. This formatting cannot be changed.

Contract Information								
Contract Id E3R38	Prime Project Id 21869925201	Description BRIDGE REPAIR-REHABILITATION	Vendor PNEUMATIC CONCRETE CO., INC.	Original Bid \$459,900.37				
Dates From SM								
Letting 6/14/2018	Executed 7/25/2018	Notice To Proceed 8/22/2018	Time Began 10/1/2018	Final Accepted 2/19/2019	Offer Final Payment 3/4/2019	Offer Final Payment Returned 3/4/2019	Regular Acceptance Letter Returned 4/8/2019	Qualified Letter Returned
21A Received 4/8/2019	Last Document Received 4/8/2019	Certification Compliance 3/6/2019	Certification Materials 2/26/2019	Received at DFEO 3/6/2019	Par Begin Date 3/6/2019	Par End Date 3/6/2019		
Calculated Dates								
Date To Submit 3/21/2019	45 Days from Req Doc 5/23/2019	75 Days from FA 5/5/2019	Required Pay Off 5/23/2019					
Project Personnel								
Project Administrator Munyon, Patrick	Project Manager Kerwin, Jeff	Resident Office Midway Operations Center	Resident Engineer Corbin, Gabriella	DFEM David Bradford	DCE Ed Hudec	District Secretary Philip Gainer		

Explanation of Dates

1. **Last Document Received** is the receipt date of last required document, besides the **21-A** and the **Acceptance Letter** required in Spec 9-8. Remember to identify the **Name of Last Document Received** on the DFEO tab. This is a Key Date in SiteManager.
2. **Date to Submit** is calculated as the **Final Acceptance Date** plus 30 days.
3. **45 Days from Req Doc** is calculated as 45 days from the latter of the **21-A**, the **Acceptance Letter**, or the **Last Document Received** (and is used to calculate the **Required Pay Off** date on the *Final Interest Payment Log*).
4. **75 Days from FA** is calculated as the **Final Acceptance Date** plus 75 days (and is used to calculate the **Required Pay Off** date on the *Final Interest Payment Log*).
5. **Required Pay Off** date is calculated per the *Final Interest Payment Log* form.
6. **Day(s) in Review** on the *PAR* form is calculated as the difference between the **Begin Post Audit Review** date entered in SiteManager and **End Post Audit Review** date entered in SiteManager. If **Begin Post Audit Review** and **End Post Audit Review** are equal, the days will be 1.
7. **Days to Submit FE Documentation** on the *PAR* form is calculated as the difference between **Final Acceptance Date** and **Received at District FE Office** entered in SiteManager. This number can be adjusted for weekends/holidays on the DFEO tab using the **Days to Submit Adjustment** field. The maximum adjustment is five (5) days.

The *SiteManager Key Dates* needed for this application are:

1. Time Begin Date
2. Final Acceptance Date
3. Offer of Final Payment Date
4. Receipt of Offer of Final Payment
5. Qualified Letter Returned
6. 21-A Received
7. Certification of Compliance Received
8. Material Certification Date
9. Received at District FE Office
10. Last Document Received
11. Begin Post Audit Review
12. End Post Audit Review

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Add Contract Details

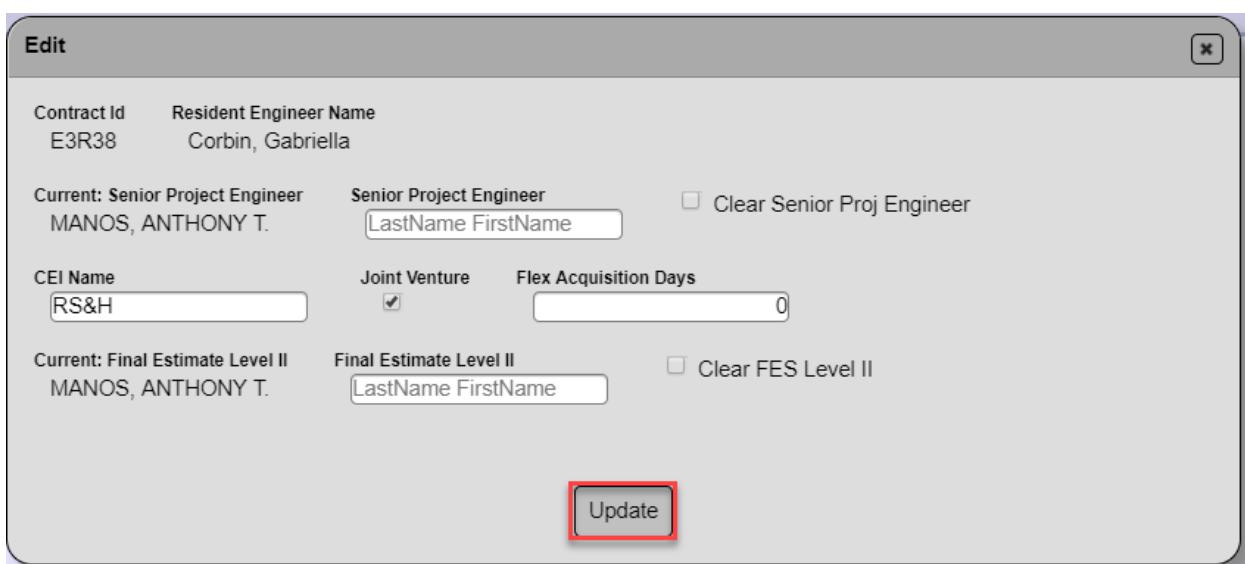
Contract Information tab

This step is the responsibility of the Resident Office to initiate before submittal of the Final Estimates Documentation to the District Final Estimates Office, unless the District created the contract for a QC Review.

Select Edit.



Enter the appropriate Contract Information, then select Update.



The dialog box contains the following fields:

Contract Id	Resident Engineer Name	
E3R38	Corbin, Gabriella	
Current: Senior Project Engineer	Senior Project Engineer	
MANOS, ANTHONY T.	<input type="text"/> LastName FirstName	
<input type="checkbox"/> Clear Senior Proj Engineer		
CEI Name	Joint Venture	Flex Acquisition Days
RS&H	<input checked="" type="checkbox"/>	<input type="text"/> 0
Current: Final Estimate Level II	Final Estimate Level II	
MANOS, ANTHONY T.	<input type="text"/> LastName FirstName	
<input type="checkbox"/> Clear FES Level II		
<input type="button" value="Update"/>		

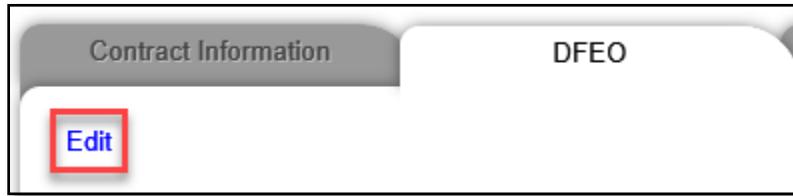
NOTE: Senior Project Engineer and Final Estimate Level II are selected from FDOT Active Directory. Enter Last Name {space} first name and then wait for list to generate. This may take a moment. Contact [SCO System Section](#) if a name doesn't appear in the list.

Flex Acquisition Days should match the flex acquisition days in SiteManager. We collect this number in Final Estimate Status as an integer (number), since SiteManager collects it as a text field. This aids in using the number of days in reporting and calculations.

DFEO tab

This step is the responsibility of the District Final Estimates Office.

Select Edit.



Enter the appropriate Contract Information, then select Update.

NOTE: PAR Reviewer is selected from FDOT Active Directory. Enter Last Name {space} first name and then wait for list to generate. This may take a moment. Contact [SCO System Section](#) if a name doesn't appear in the list.

Refund Offer Amount is the amount the Department overpaid the Contractor and is requesting back from the Contractor on the Offer Letter (i.e. the Contractor will submit a check with the Acceptance Letter).

Qualified Amount is the amount qualified by the Contractor on the Qualified Acceptance Letter.

Days in Review is automatically calculated by the system as the difference between the *Begin Post Audit Review* date entered in SiteManager and *End Post Audit Review* date entered in SiteManager. If *Begin Post Audit Review* and *End Post Audit Review* are equal, the days will be 1. This is used on the *PAR form*.

Days to Submit Adjustment is used to adjust the *Days to Submit* on the *PAR form* for weekends or holidays. The maximum adjustment is five (5) days.

Name of Last Document identifies the last required document in Specification 9-8, except the 21-A and Acceptance Letter, received from the Contractor.

Current Status

The current status listed on the DFEO tab is determined as follows:

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UNDER CONSTRUCTION

- Initial status for all contracts

FINAL ACCEPTED – CONSTRUCTION COMPLETE, JOB IN RESIDENT OFFICE

- Status change triggered when **Final Acceptance Date** in SiteManager is entered

FE PGK NOT SUBMITTED – FINAL ESTIMATE PACKAGE NOT RECEIVED AS REQUIRED BY DFEO

- Status change triggered when 30 days pass after Final Acceptance without **Received at District FE Office** date in SiteManager

SUBMIT – FINAL ESTIMATE HAS BEEN SUBMITTED TO CONTRACTOR FOR REVIEW AND ACCEPTANCE

- Status change triggered when **Offer of Final Payment Date** in SiteManager is entered.

F.E. DOCUMENTATION RECEIVED - SUBMITTED TO DFEO

- Status change triggered when **Received at District FE Office** date in SiteManager is entered

NEW – FINAL ESTIMATES BEING CHECKED

- Status change triggered when **PAR Begin Date** in SiteManager is entered

ADD FIND – VERIFY CHANGES, PREPARE FOR SUBMIT TO CONTRACTOR

- Status change triggered when **UnderPayment Amount** or **OverPayment Amount** in FES is not zero; AND
- Finding Sent** and **Finding Received Dates** in SiteManager are blank

BEING HELD FOR INFORMATION

- Status change triggered when **Pending Change Orders** exist in SiteManager; AND
- No PAR checkbox** checked or **PAR End Date** in SiteManager is entered

RESERVE – CONTRACTOR HAS SUBMITTED A QUALIFIED ACCEPTANCE LETTER

- Status change triggered when **Qualified Letter Returned Date** in SiteManager is entered; AND
- No PAR checkbox** checked or **PAR End Date** in SiteManager is entered

PASSED

- Status change triggered when **Passed Date** in SiteManager is entered

PAID OFF

- Status change triggered when **Paid Off Date** in SiteManager is entered.

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PAR Finding tab

This step is the responsibility of the District Final Estimates Office.

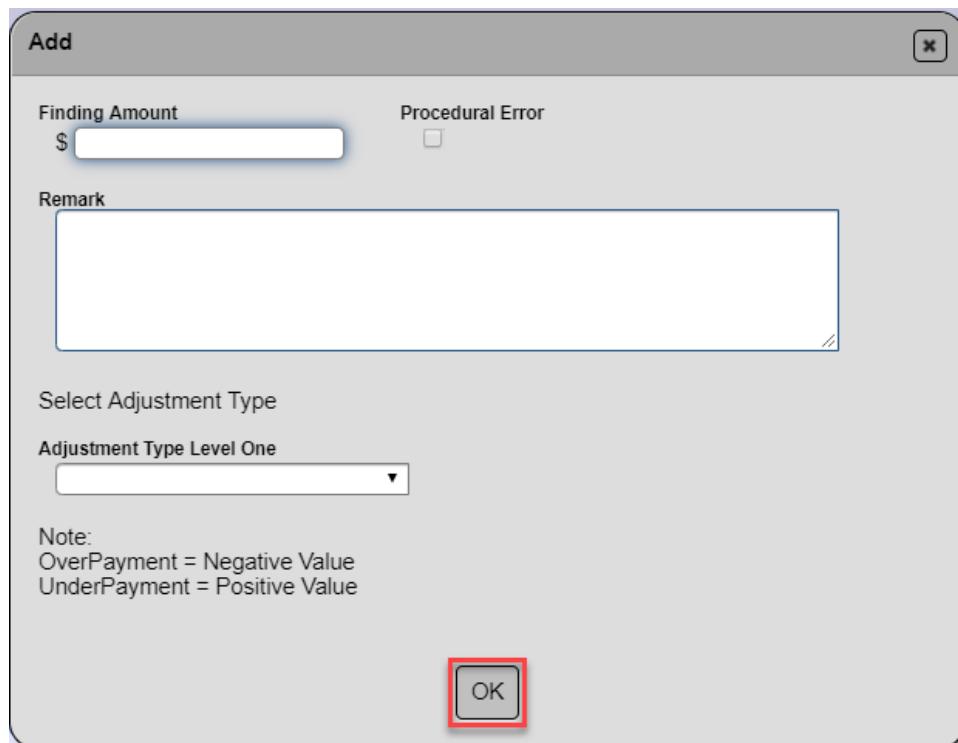
The District Final Estimates Office will enter all findings that should appear on the PAR Report here with the corresponding dollar amount. The application will automatically calculate the Overpayment, Underpayment, Net Value, and Absolute Value from the PAR Findings Entries.

Select Add.



Over Payment	Under Payment	Net Value	Absolute Value
\$0.00	\$0.00	\$0.00	\$0.00

Enter each PAR finding (separately), select OK, and repeat as needed.



Edit or Delete entries as needed.

Edit	Finding Amount	Adjustment Type Description
	\$0.00	General
Remark a 24" x 30" pull box was installed in place of the original called for 30" x 60" pull box, but was not denoted on plan sheet T-8		
		Delete

Findings tab

This step is the responsibility of the District Final Estimates Office.

The District Final Estimates Office will enter all additional findings here with the corresponding dollar amount, date sent, and date received.

Edit PAR Entry

The application will automatically enter the first Finding based on the entries from the PAR Finding tab. The District Final Estimates Office will need to enter the corresponding dates for when the PAR was sent and when a response was received, as well as upload the PAR response document.

Select Edit.

Contract Information	DFEO	PAR Finding	Findings
Add Edit Type PAR Sent Response Received Finding Amount Remark PAR mm/dd/yyyy mm/dd/yyyy 828.78			

Enter appropriate dates and remarks. When the CEI PAR response is received upload the file here, in lieu of the SharePoint site, then select Update.

Edit	
PAR Sent	Response Received
mm/dd/yyyy	mm/dd/yyyy
Remark	
<input type="text"/> Current Document <input type="checkbox"/> Remove Current Document Document <input type="button" value="Upload File"/>	
Update	

Enter Additional Findings

Select Add.

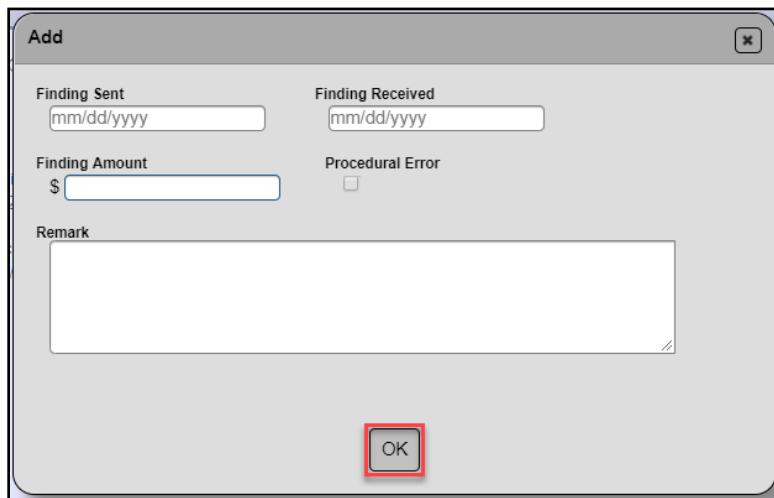


Contract Information DFEO PAR Finding Findings

Add

Edit	Type	PAR Sent	Response Received	Finding Amount	Remark
	PAR			828.78	

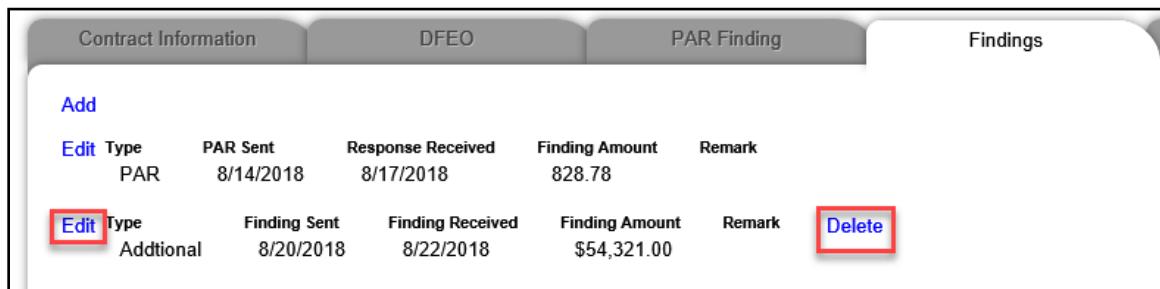
Enter appropriate information, then select OK.



Add

Finding Sent <input type="text" value="mm/dd/yyyy"/>	Finding Received <input type="text" value="mm/dd/yyyy"/>
Finding Amount <input type="text" value="\$"/>	Procedural Error <input type="checkbox"/>
Remark <input type="text"/>	
OK	

Edit or Delete entries as needed.



Contract Information DFEO PAR Finding Findings

Add

Edit	Type	PAR Sent	Response Received	Finding Amount	Remark
	PAR	8/14/2018	8/17/2018	828.78	
Edit	Type Additional	Finding Sent 8/20/2018	Finding Received 8/22/2018	Finding Amount \$54,321.00	Delete

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District QC tab

This step is the responsibility of the District Final Estimates Office.

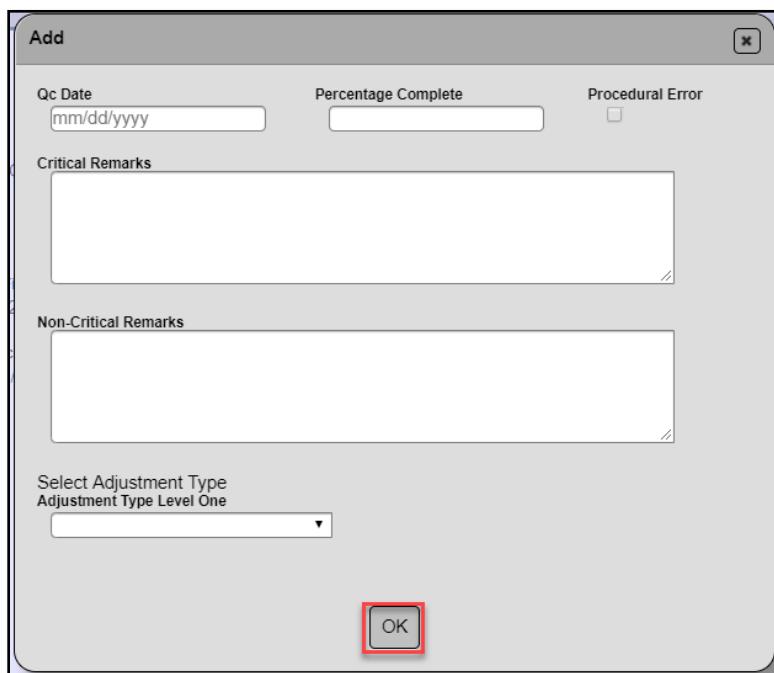
The District Final Estimates Office will enter all findings from QC Reviews here with the corresponding QC Review date and Percentage contract was reviewed.

NOTE: FE Field Review Form can be used to take notes and aid data entry for QC Reviews, but this form is no longer required to document QC Review findings. Also, QC Reviews no longer require a response from the CEI.

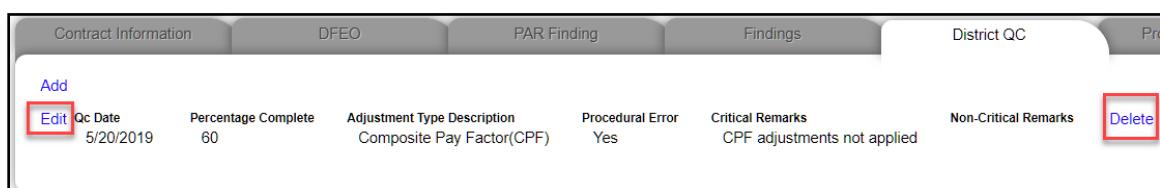
Select Add to enter a Finding.



Enter the appropriate information and select OK. Repeat as needed.



Edit or Delete entries as needed.



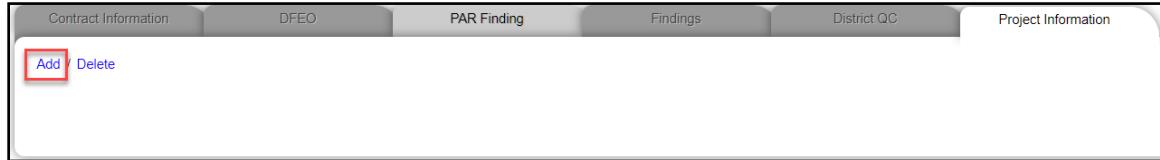
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Project Information tab

Much of the project information will be automatically filled in by the application from data entered in SiteManager.

Add the project information, if it is not displayed.

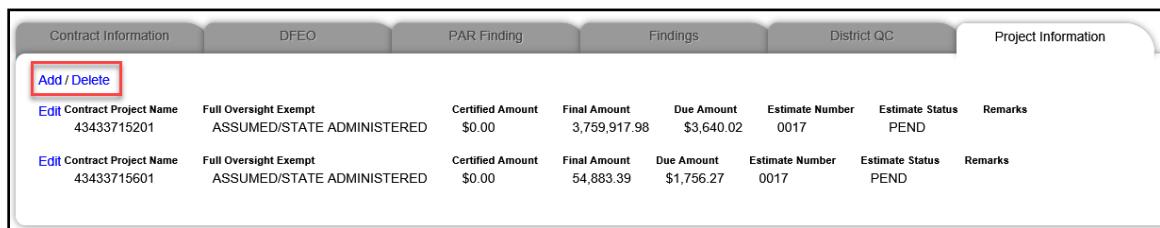


The screenshot shows a tabbed interface with the 'Project Information' tab selected. A red box highlights the 'Add / Delete' button located in the top-left corner of the content area.

Depending on the District's preference, the project information tab can be maintained two ways:

1. The District can Add and Delete the project information as many times as needed until only the final information is displayed.
2. The District can Add as many times as needed to keep a running history of the estimates submitted on the contract.

NOTE: The Delete option will delete all information displayed, which can't be undone.



The screenshot shows the 'Project Information' tab with two rows of data. The first row has an 'Edit' button highlighted with a red box. The data for the first row is: Contract Project Name 43433715201, Oversight Status Full Oversight Exempt ASSUMED/STATE ADMINISTERED, Certified Amount \$0.00, Final Amount 3,759,917.98, Due Amount \$3,640.02, Estimate Number 0017, Estimate Status PEND, and Remarks. The second row has an 'Edit' button highlighted with a red box. The data for the second row is: Contract Project Name 43433715601, Oversight Status Full Oversight Exempt ASSUMED/STATE ADMINISTERED, Certified Amount \$0.00, Final Amount 54,883.39, Due Amount \$1,756.27, Estimate Number 0017, Estimate Status PEND, and Remarks.

Edit the contract information as needed by selecting Edit.



The screenshot shows the 'Project Information' tab with two rows of data. The first row has an 'Edit' button highlighted with a red box. The data for the first row is: Contract Project Name 43433715201, Oversight Status Full Oversight Exempt ASSUMED/STATE ADMINISTERED, Certified Amount \$0.00, Final Amount 3,759,917.98, Due Amount \$3,640.02, Estimate Number 0017, Estimate Status PEND, and Remarks. The second row has an 'Edit' button highlighted with a red box. The data for the second row is: Contract Project Name 43433715601, Oversight Status Full Oversight Exempt ASSUMED/STATE ADMINISTERED, Certified Amount \$0.00, Final Amount 54,883.39, Due Amount \$1,756.27, Estimate Number 0017, Estimate Status PEND, and Remarks.

Enter the appropriate information, then select Update. Repeat for each project included in the contract.



The screenshot shows an 'Edit' dialog box. It contains the following fields: Project ID 43433715201, Oversight Status Full Oversight Exempt ASSUMED/STATE ADMINISTERED, Certified Amount \$0.00, Final Amount \$3,759,917.98, and Amount Due \$3,640.02. Below these, there are fields for Estimate Number 0017, Estimate Status PEND, and Remarks (which is empty). At the bottom is an 'Update' button.

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Certified Amount is the amount entered by the CEI on *Form 700-050-10 Pay Item Summary and Certification Sheet* or by the CCEI on *Form 700-050-38, Certification as to Accuracy of Final Estimate*.

Final Amount is automatically generated by the system as the final amount paid to the Contractor as of the estimate number indicated.

Amount Due is automatically generated by the system for the last estimate in SiteManager. If the status is PEND, this is the amount due on the estimate number indicated. If the status is APRV, this amount is \$0.00 since the estimate is paid there is no longer an amount due to the Contractor.

Estimate Number is automatically generated by the system for the last estimate in SiteManager.

[Return to the List of Contracts](#)

Select Hide Details

Hide Details
Hide Header

Contract Information

Contract Id	Prime Project Id	Description	Vendor	Original Bid
E3R38	21869925201	BRIDGE REPAIR-REHABILITATION	PNEUMATIC CONCRETE CO., INC.	\$459,900.37

Dates From SM

Letting	Executed	Notice To Proceed	Time Began	Final Accepted	Offer Final Payment	Offer Final Payment Returned	Regular Acceptance Letter Returned	Qualified Letter Returned
6/14/2018	7/25/2018	8/22/2018	10/1/2018	2/19/2019	3/4/2019	3/4/2019	4/8/2019	

21A Received	Last Document Received	Certification Compliance	Certification Materials	Received at DFEO	Par Begin Date	Par End Date
4/8/2019		3/6/2019	2/26/2019	3/6/2019	3/6/2019	3/6/2019

Calculated Dates

Date To Submit	45 Days from Req Doc	75 Days from FA	Required Pay Off
3/21/2019	5/23/2019	5/5/2019	5/23/2019

Project Personnel

Project Administrator	Project Manager	Resident Office	Resident Engineer	DFEM	DCE	District Secretary
Munyon, Patrick	Kerwin, Jeff	Midway Operations Center	Corbin, Gabriella	David Bradford	Ed Hudec	Philip Gainer

Contract Information
DFEO
PAR Finding
Findings
District QC
Project Information

 [Create Form 700-050-28, Final Estimates Office Record of Final Plans and Documents](#)

Select the icon to create **Form 700-050-28, Final Estimates Office Record of Final Plans and Documents**. Then select Open or Save.



 [Create PAR Report](#)

Select the icon to create the PAR Report. Then select Open or Save.



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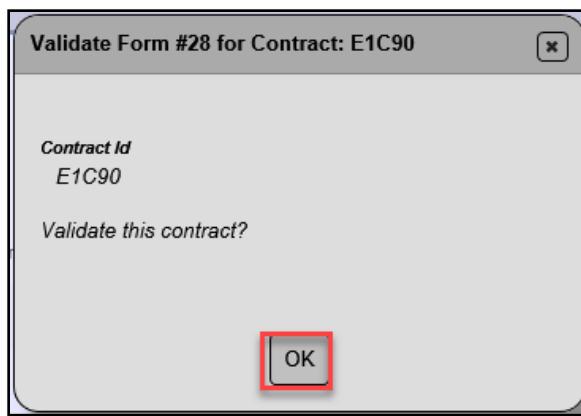
Create Form 700-050-26, Final Interest Payment Log

Select the icon to create **Form 700-050-26, Final Interest Payment Log**. Then select Open or Save.



Validate Form 700-050-28, Final Estimates Office Record of Final Plans and Documents

Select the icon to validate the information on **Form 700-050-28, Final Estimates Office Record of Final Plans and Documents** is accurate. This step is required before it can be sent to EDMS. Do not enter this form into EDMS directly.



This step will verify the following information is complete:

In SiteManager:

1. Push Button Liquid Damages Amount
2. Notice To Proceed Date
3. Time Began Date
4. Work Began Date
5. Warranty Date
6. Certification of Materials Date
7. Offer of Final Payment Date
8. Receipt Offer of Final Payment Date
9. Regular Acceptance Letter Returned Date
10. Acceptance Refund Amount
11. PAR Begin Review Date
12. PAR End Review Date
13. Passed Date
14. Paid Off Date

In Final Estimates Status:

15. PAR sent date from Findings tab
16. Remarks are missing from Project Info

In Contract Information Monitoring (CIM):

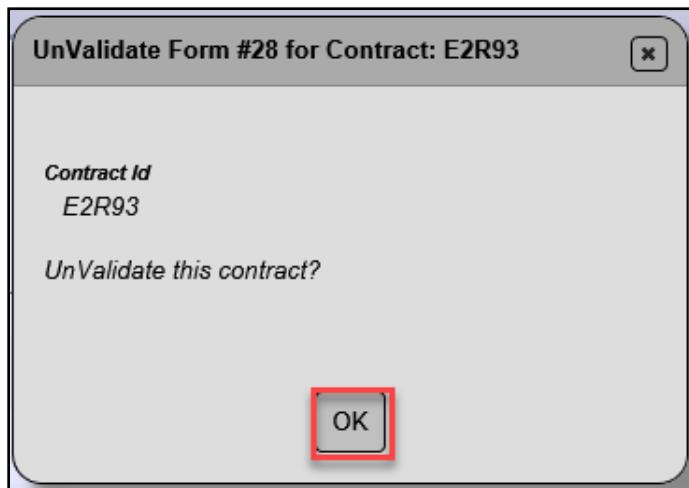
17. Warranty information
18. Warranty Begin date
19. Warranty End date

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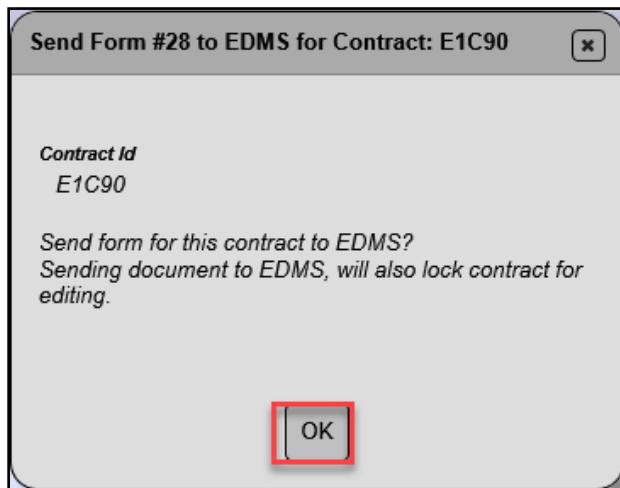
⑤ **Unvalidate Form 700-050-28, Final Estimates Office Record of Final Plans and Documents**

Select the icon to unvalidate **Form 700-050-28, Final Estimates Office Record of Final Plans and Documents**.



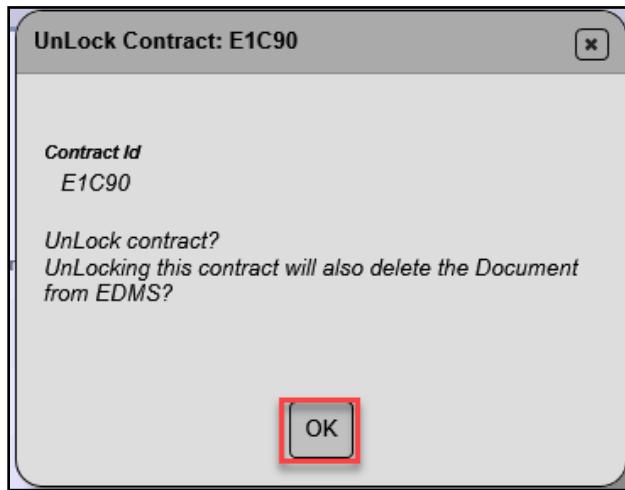
⑥ **Send Form 700-050-28, Final Estimates Office Record of Final Plans and Documents to EDMS**

Select the icon to send **Form 700-050-28, Final Estimates Office Record of Final Plans and Documents** to EDMS. Do not enter this form into EDMS directly.



Unlock Contract

Select the icon to unlock the Contract. This will delete the document from EDMS and open the contract for additional editing.



Comments or Suggestions

If you have any comments or suggestions concerning this application, please send an email to CO-FinalEstimateSection@dot.state.fl.us.

Issues

If you have any issues with this application, please submit a ticket to <https://scos.fdot.gov/>.