

# The PS&E Package Module

The PS&E Package module allows the submittal of the PS&E Package to be entered and routed electronically from the Engineer of Record through the various review levels at the District and Central Office all the way to the Contract Office for Advertisement. The module was created to ensure the timely submittal and review, along with the improvement to the storage and availability of the associated documents.

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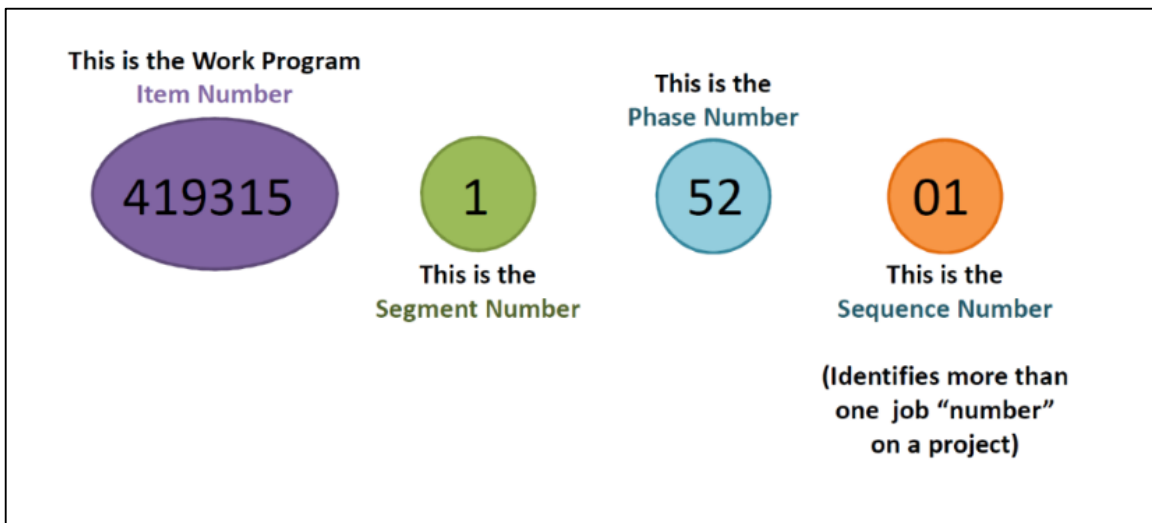
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## MODULE OVERVIEW

### Explanation of Terms

There are several terms used regarding the PS&E Module. To ensure a clear understanding of each term, a definition is given for the following terms.

**PROJECT NUMBER** is the first 7 unique digits assigned to a project. Many of you work with the **FINANCIAL NUMBER** as well. The financial number is an 11-digit number. It is the 7 unique digits along with 2 digits to represent the phase and 2 digits to represent the sequence. There is a great Computer Based Training that explains these two numbers in depth. It is called Work Program 101 and is highly recommended. The **PROPOSAL ID** is an identifier for the contractors bid proposal and will become the construction contract number. It is also shown on the Key Sheet of the plans set.



*Figure 1 Work Program Number Breakdown*

**MODULE** is each individual area of information. Think of a module as a file folder within a specific project. The module title bar is blue. If selected, it can be collapsed and expanded as needed. The **SUBMODULE** is a smaller section within a module. It too can be collapsed and expanded. By default, all submodules within the PS&E Package Module are collapsed to reduce the amount of scrolling.

**PACKAGE** is also known as the PS&E Submittal Package. This is the combination of the Contract File Index items (CFI), the PS&E submittal documents which includes signed and sealed plans, specifications and estimate files, and any supporting documents that have been included. Contained within the Package is the **SUBMITTAL**. The submittal contains the signed and sealed plans, specs packages, TSPs, and CADD.zip files that are submitted by the designer. There can be multiple submittals within a Package. Only the final, complete submittal is routed through to the Contracts Office. At times, changes must occur after a Package has made it to the Contracts Office. This is a **REVISION**.

At times, changes must occur after a Package has made it to the Contracts Office. This is a **REVISION**. The **PS&E Transmittal Date** is the date that control of the PS&E Package is transferred from the District PS&E Office to the Final Plans/Plans Processing office in Central Office for a Contract Class 1. The **PS&E Final Acceptance Date** is the date that control of the PS&E Package is transferred to the Contracts Office.

## Roles & Privileges

There are several user roles in this module. This section will define each role and privileges that are inherited or granted.

**Project Manager (PM)** – the user(s) assigned as the contact and responsible for the project. As a PM, the user *inherits* the abilities to the following actions on ALL projects they are assigned to:

- Create & Submit PS&E Submittals and/or Revisions
- Upload Documents
- Edit, Withdraw and/or Modify Submittals
- Edit, Withdraw and/or Modify Revisions
- Add comments
- Generate CFI Form, Transmittal Memo and/or Revision Memo

**Engineer of Record (EOR)** – the individual responsible for the delivery of the plans to the Department. As the EOR, the user *inherits* the abilities to the following actions on ALL projects where they are listed as the EOR in the address book:

- Create & Submit PS&E Submittals and/or Revisions
- Upload Documents
- Edit, Withdraw and/or Modify Submittals
- Edit, Withdraw and/or Modify Revisions
- Add comments
- Generate CFI Form, Transmittal Memo and/or Revision Memo

**Requestor** – the user who can create and submit a submittal package. As a Requestor, the user is *granted* the abilities to the following actions on ANY project within their district:

- Create & Submit PS&E Submittals and/or Revisions
- Upload Documents
- Edit, Withdraw and/or Modify Submittals
- Edit, Withdraw and/or Modify Revisions
- Add comments
- Generate CFI Form, Transmittal Memo and/or Revision Memo

**Reviewer** – the user who is assigned to review and to verify the submittal for completeness and accuracy. The reviewers exist at both the district and central office level. As a Reviewer, the user *inherits* the abilities to the following actions on ANY projects where they are assigned as a reviewer:

- View and Edit details of the Submittal
- View all attached documents
- Upload documents
- Include and Update Transmittal Memo Details
- Add Comments
- Request Changes to a Submittal
- Approve or Reject a Submittal
- Generate CFI Form, Transmittal Memo and/or Revision Memo

**Lead** – a user(s) who have been **granted** permission to handle a submittal in the absence of a reviewer or override the reviewer(s) decision. These Leads exist at both the district and central office level.

**Viewer** – user(s) who have been **granted** permission to view PS&E Submittals and the related documents for ANY project within their district.

## Module Privileges

There are 10 available privileges that can be granted to users for the PS&E Package Module. Each privilege is explained below.

**Manage PS&E Submittal** – allows a user to create and submit a submittal package or revision package on ANY project within the district. These actions include Upload Documents, Edit, Withdraw and/or Modify Submittals, Edit, Withdraw and/or Modify Revisions, Add comments, as well as Generate CFI Form, Transmittal Memo and/or Revision Memo

**PS&E District Lead**– to handle a submittal in the absence of a reviewer or override the reviewer(s) decision at the District Level Review on ANY project within their district. This privilege also allows the ability to view ALL submittals within their district.

**Manage Proposal Documents**– allows a user to upload, edit or remove documents within the Proposal Document submodule for ANY project within the district they are assigned.

**Manage District Review Assignment**– ability to Add and Remove users from the District Level reviewer list as needed.

**Manage Central Office Review Assignment**– ability to Add and Remove users from the Central Office Level reviewer list as needed.

**Manage PS&E Workflow / PSEE Admin**– ability create, update and remove workflows for use in the PS&E module.

**Manage Central Office Review Assignment**– ability to Add and Remove users from the Central Office Level reviewer list as needed.

**PS&E Central Office Lead** – to handle a submittal in the absence of a reviewer or override the reviewer(s) decision on at the Central Office Level Review ANY project within their district. This privilege also allows the ability to view ALL submittals within their district.

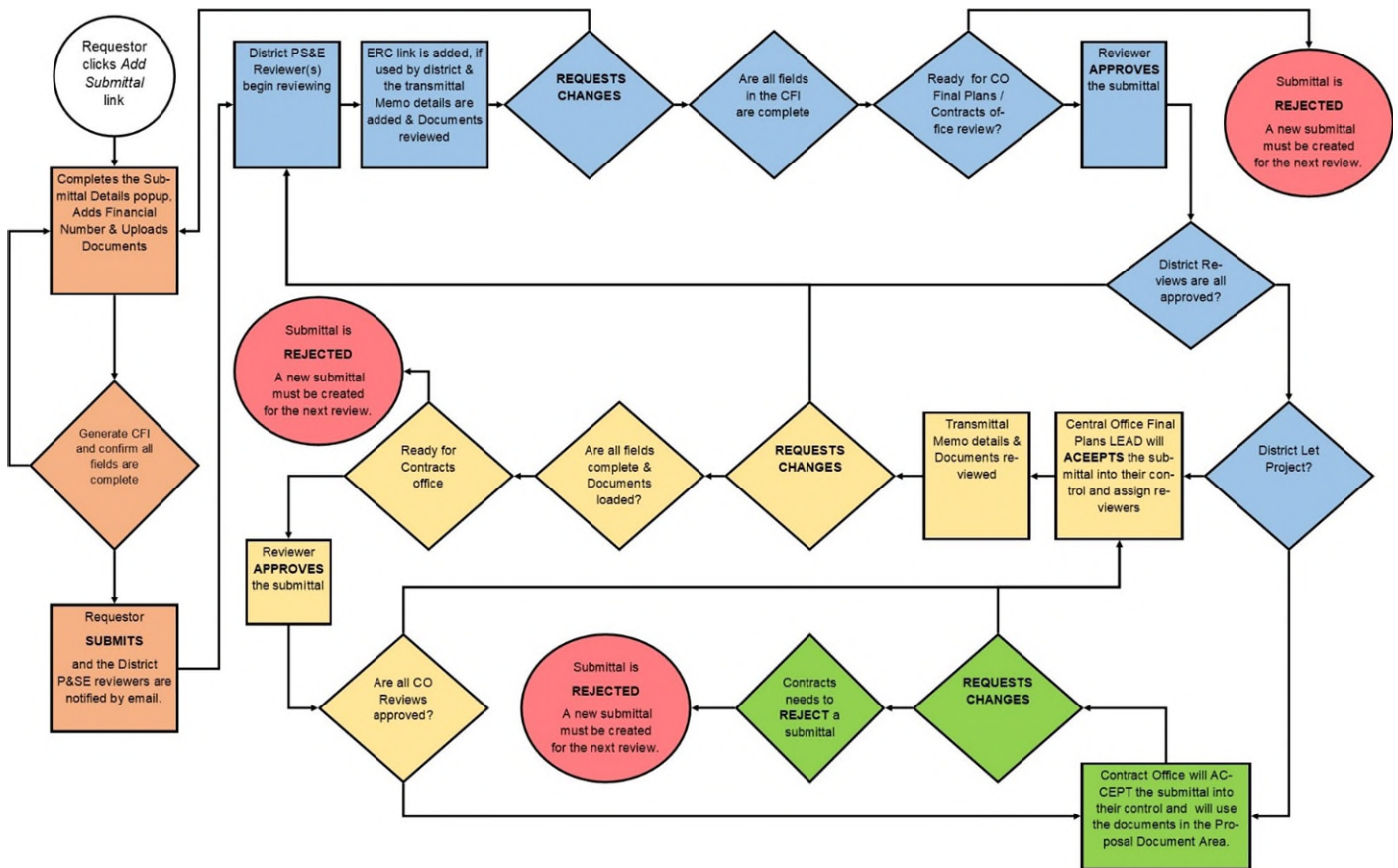
**CO Contracts Office** – allows a user to manage the package once it reaches the Contracts Office in Central Office. These actions include viewing submittal details, viewing all upload Documents, Reject, Request Changes, Request Revision, and Withdraw Submittals and Revisions, Add comments, as well as Generate CFI Form, Transmittal Memo and/or Revision Memo.

**DISTRICT Contracts Office** – allows a user to manage the package once it reaches the District Contracts Office. These actions include viewing submittal details, viewing all upload Documents, Reject, Request Changes, Request Revision, and Withdraw Submittals and Revisions, Add comments, as well as Generate CFI Form, Transmittal Memo and/or Revision Memo.

**Can View Submittal** – allows a user view the submittal and revision for ANY project within the district they are assigned.

### Process Flow Chart

The following flow chart follows a typical Package through the submittal stages from the creation of a submittal to the Contract’s Office receiving the Package for advertisement.





## Locating the Module

1. Select and open the Module Menu.
2. In the manage area, select PS&E Package.

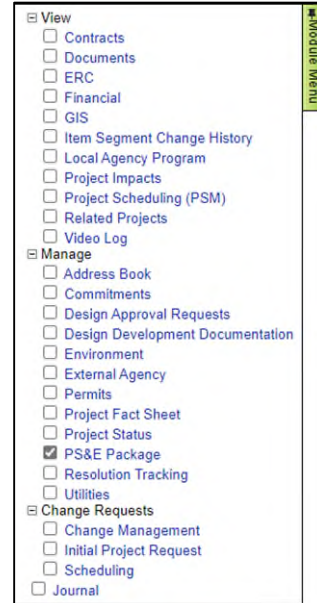


Figure 2 Module Menu

3. The module will display as "Plans, Specifications, and Estimates (PS&E) Package with several submodules.

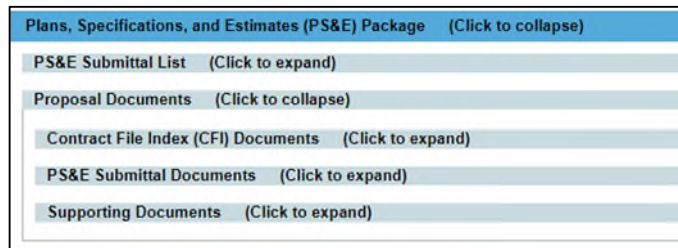


Figure 3 PS&E Module with Submodules collapsed

**Note:** Selecting the blue header of any modules currently displayed will collapse an open module so you can see the module you are working on more easily.

## Explanation of a Submittal and Its Details

Within the PS&E Package Module there are two submodules. The following is a brief explanation of each. A detailed explanation and the information expected will be covered in the respective area of this document.

### List of Submittal(s)

The “PS&E Submittal List” submodule lists each submittal and review that occurs to prepare the Package for advertisement. This list will also include each revision that is created.

The screenshot shows the 'PS&E Submittal List' interface. The top section is a table with columns: 'View', 'SUBMITTAL ID', 'Financial Number', 'Associated Projects', and 'Submitted Date'. Below the table are links for '[Add PS&E Submittal]' and '[Create a Revision]'. The bottom section shows a detailed view of a submittal with columns: 'Optional Notes', 'Status', 'Status Date', 'Submittal Managed By', 'Requested By', and 'Comments Due Date'.

View	SUBMITTAL ID	Financial Number	Associated Projects	Submitted Date
<a href="#">View</a>	SUBMITTAL 1	T1305	433899-2-52-01, 433899-2-57-01	10/12/2020
<a href="#">View</a>	REVISION 1	T1305	433899-2-52-01, 433899-2-57-01	10/12/2020

Optional Notes	Status	Status Date	Submittal Managed By	Requested By	Comments Due Date
	Revision Requested Under Modification	10/12/2020	Current Project	Eric Shimer	
		10/12/2020	Current Project	Eric Shimer	

**Note:** Depending on screen resolution, there may be a horizontal scroll bar to see all columns.

By clicking the “View” link, the submittal details can be seen. Information for each submittal is specific to that submittal.

### Submittal Overview Details

The first section of a submittal contains the submittals number. There are fields automatically completed by the application. This includes the Submittal Number, submittal status, Requested By, Created Date and the Approval Managed By fields. Upon creation, the requestor enters the Proposal ID, PS&E District Comments Due Date, and Optional Notes. If this was a re-let, it will also include the old proposal id number for the previous advertisement. The Include Transmittal Memo Information selection will add an additional submodule within the submittal.

The screenshot shows the 'Submittal Overview Details' form. It includes fields for Submittal Number, Is this a re-let project?, New Proposal ID, Status, PS&E District Comments Due Date, Requested By, Created Date, Optional Notes, Approval Managed By, and Include Transmittal Memo Information? (Yes/No). There are also links for [Edit] and [Submit].

Submittal Number: SUBMITTAL 1

Is this a re-let project?: No

New Proposal ID: T1305

Status: Draft

PS&E District Comments Due Date:

Requested By: Eric Shimer

Created Date: 10/9/2020

Optional Notes:

Approval Managed By: Current Project

Include Transmittal Memo Information?:  Yes  No

[Edit] [Submit]

Contract File Index Information (Click to expand)

## Submittal Submodules

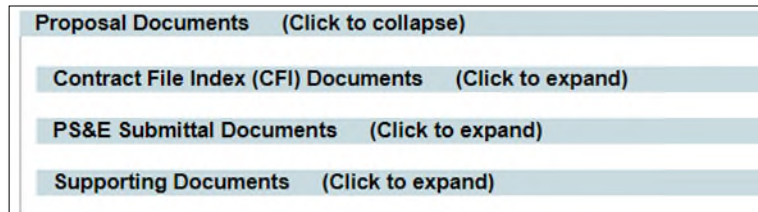
Include Transmittal Information??:  Yes  No

- Contract File Index Information (Click to expand) ↓
- Maintenance Agreement Executed Dates (Click to expand) ↓
- Phase and Sequence for Submittal (Click to expand) ↓
- Transmittal Memo Details (Click to expand) ↓
- Related ERC Submittals (Click to expand) ↓
- District Reviews (Click to expand) ↓
- Central Office Reviews (Click to expand) ↓
- Comments (Click to expand) ↓
- PS&E Review Document (Click to expand) ↓

- **Contract File Index Information** is the first submodule within a submittal. It contains the Yes, No, Not Applicable questions from the CFI Form. These questions are answered at the initial creation of the submittal.
- **Maintenance Agreement Executed Dates** only appears if YES is answered to the question in the Contract File Index Information. The dates of each Maintenance Agreement is added within here.
- **Phase and Sequence for Submittal** is the next submodule. This submodule has a pre-filtered list of all 5X, 6X and 7X phases that are currently funded for the lead project and any project with the Let-Together code in FM. These projects can also be seen in the Related Projects Module. From the pre-filtered list, the requestor/creator can select which financial projects are to be part of the Package.
- **Transmittal Memo Details** is a submodule to store details related to the transmittal memo and the Memo is generated from a link within.
- **Related ERC Submittals** is a submodule for the districts who track their reviews through the ERC application. Each ERC submittal can be associated to the PS&E Submittal.
- **District Reviews** submodule lists the reviewers involved in the submittal's review as well as the status of the review. The reviewers here are at the District level and primarily are from the PS&E office. There is also the inclusion of the FYI reviewers who are part of the review for informational purposes only. They do not have an action to complete.
- **Central Office Reviews** submodule plays the same role as the District Reviews, except this section is only included if the project is a Contract Class 1. Central Office reviews cannot begin until the District Reviews are all complete and approved. This module also includes FYI reviewers who are part of the review for informational purposes only. They do not have an action to complete.
- **Comments** submodule captures the comments left by any Reviewer during the review process, by FYI user, and by general users who have access to the module.
- The last submodule is the **PS&E Review Document**. This document area is for items related specifically to this submittal. If a document is related to the project or package as a whole, it will be uploaded in the **Proposal Documents** submodule.

## Proposal Documents

**Proposal Documents** submodule contains 3 additional submodules to better organize the documents associated to the Package. These document submodules are not submittal specific. Rather they apply to the Package as a whole. **They should be the most current/final document(s).**



*Figure 4 Proposal Documents Submodule Expanded*

- The first submodule is the **Contract Final Index** documents. These are the certifications that are expected as part of the submittal to the District PS&E Office.
- The second submodule is the **PS&E Submittal Documents**. These are the documents that the Contracts Office will download and post for the advertisement. This is the FINAL document version. These documents are identified by EDMS as 'Exempt from Public Record' and will be viewable based on privileges.
- The final submodule is **Supporting Documents**. These are 'extra' documents that are related to the package but not required for advertisement. This could include documents that are district specific.

## ADDING A SUBMITTAL


A submittal is generally created by the Engineer of Record or the Project Manager, depending on the district.

### Add PS&E Submittal

The option to 'Add PS&E Submittal' will be visible in the PS&E Submittal List submodule.

1. With the PS&E Module open for the LEAD project, Select the Add PS&E Submittal link.

*Figure 5 Add PS&E Submittal link*

2. A new popup modal appears. This is where the details of the Submittal are entered. The  indicates fields that are required to save the entry. The questions answered will also fill out the Contract File Index.

*Figure 6 PS&E Submittal Pop-Up modal*

**Is this a re-let project?:** This Yes/No question is set by default to No. If Yes is selected, an additional input will appear requiring the old Proposal ID(s) to be entered.

**New Proposal ID:** This field is required. This is the proposal/construction contract number on the Key Sheet of the plans.

**Requested By:** By default, the user who is adding the submittal. If the requestor should be someone else, enter their name and select them from the list.

**PS&E District Comments Due Date:** This is the expected date the district review will be completed. This field is not required.

**Project of Division of Interest under agreements dates August 20, 2015:** This is a Yes/No question. By default, the question is set to No.

**Right of Way Certification mailed to State R/W Administrator:** This is a Yes/No question. By default, the question is set to No.

**Local Funds Agreement sent to Office of Comptroller:** This is a Yes/No or Not Applicable question. By default, the question is set to No.

**Local Funds sent to Office of Comptroller:** This is a Yes/No or Not Applicable question. By default, the question is set to No.

**Project requires a Maintenance Agreement:** This is a Yes/No or Not Applicable question. By default, the question is set to No. If YES is selected, an additional submodule will appear within the submittal. It is the Maintenance Agreement Executed Dates submodule. Its purpose is to store the dates of each Executed Maintenance Agreement.

**Optional Notes:** This field, as its name states, is optional. A maximum of 200 characters can be entered to add informational notes related to this submittal.

**Workflow Selection:** Based on district preferences, workflows are established by the District Administrators in coordination with the District PS&E Manager. If NO workflows have been set, the message 'No valid workflow exists.' will be displayed. A submittal without workflows will be managed by the District PS&E Manager or a user with District Lead privileges. If only 1 workflow exists, it will be automatically selected. If 2 or more workflows exists, a dropdown will appear for the user to select the appropriate workflow.

3. Select the SAVE button. The submittal is now saved as a DRAFT and is visible in the PS&E Submittal List.
4. Select the VIEW link next to the submittal created above. This will open the submittal for the details to be added.



The screenshot displays a web application interface for managing PS&E submittals. It features a blue header bar with navigation links: "Project Info [433899-2] (Click to expand)", "Plans, Specifications, and Estimates (PS&E) Package (Click to collapse)", and "Proposal Documents (Click to expand)". The main content area is titled "PS&E Submittal List (Click to collapse)" and contains a table with the following columns: "New Proposal ID", "Financial Number", "Associated Projects", "Submitted Date", "Optional Notes", "Status", "Status Date", "Submittal Managed By", "Requested By", and "Comments Due Date". A single row is visible with the following data: "View" (link), "SUBMITTAL 1", "T13O5", "Draft", "10/9/2020", "Current Project", and "Eric Shimer". A "[Remove]" link is located at the end of the row. Below the table is a "[Add PS&E Submittal]" link.

	<a href="#">New Proposal ID</a>	<a href="#">Financial Number</a>	<a href="#">Associated Projects</a>	<a href="#">Submitted Date</a>	<a href="#">Optional Notes</a>	<a href="#">Status</a>	<a href="#">Status Date</a>	<a href="#">Submittal Managed By</a>	<a href="#">Requested By</a>	<a href="#">Comments Due Date</a>	
<a href="#">View</a>	SUBMITTAL 1	T13O5				Draft	10/9/2020	Current Project	Eric Shimer		<a href="#">[Remove]</a>

Figure 7 PS&E Submittal List - DRAFT submittal

## Add Submittal Details in Submodules

### Editing Initial Data Input

If any of the submittal details in the top section or the Contract File Index Information submodule need to be updated/revise, select the submittal number to view.

1. Select the EDIT link. This will re-open the previous popup modal for editing.

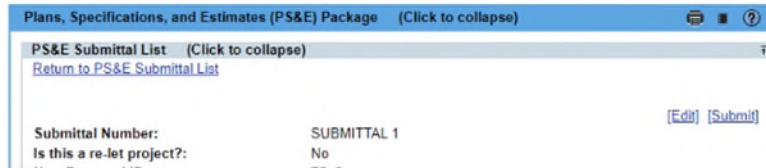


Figure 8 Edit Link

2. Make changes in the pop up.
3. Select the SAVE button to hold the changes.

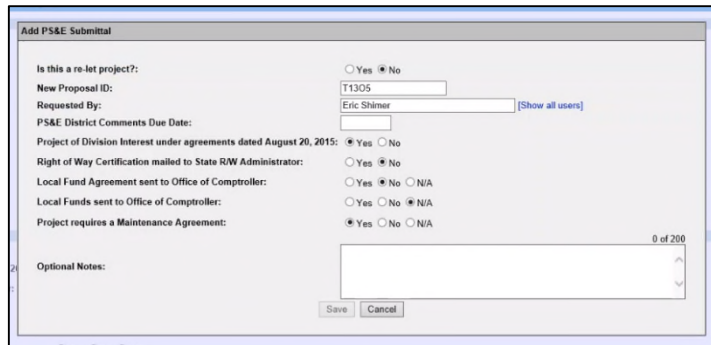


Figure 9 Submittal Edit Modal Popup

### Editing Contract File Index (CFI) Information

1. You can also edit by expanding the CFI area.
2. Select from the Yes, No or N/A items. A selection will close the submodule

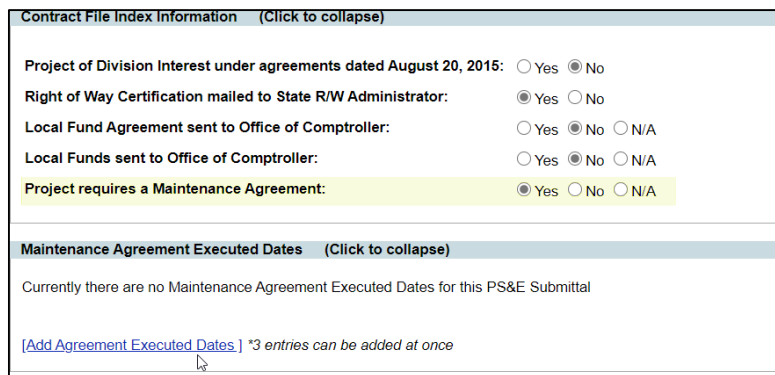


Figure 10 Editing CFI Information

3. If the project requires a maintenance agreement, you can add the dates the agreements were executed. Select the [Add Agreement Executed Dates] link. You can enter up to three dates at a time. To add more dates, reselect the [Add Agreement Executed Dates] link ..

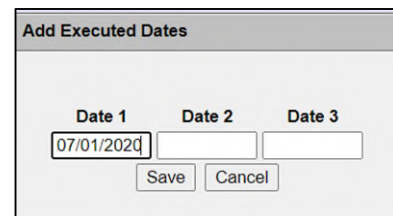


Figure 11 Add Executed Dates

## Adding Financial Number(s)

1. Expand the Phase and Sequence for Submittal submodule.
2. Select the Add Phase and Sequence link.

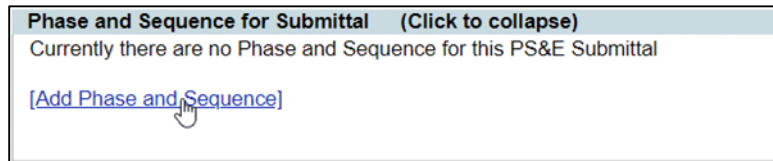


Figure 12 Add Phase and Sequence link

3. The pre-filtered list of ALL available phase and sequence combinations currently programmed in the FM system will appear. *This pre-filtered list is limited to only the 5X, 6X and 7X phases. The list will include the phase and sequences from the lead project and all projects which are set as Let Together (LT) in the Related Items Module.*
4. Click the checkbox for each financial number to be included.
5. Select the SAVE button to hold.

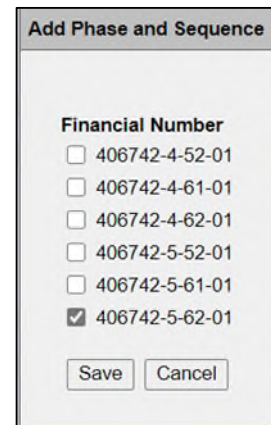


Figure 13 Phase &amp; Sequence Pre-Filtered List

## Upload Documents

Documents for the PS&E module should be uploaded in one of four submodules. The following slides will explain where each location is and what type of documents should be uploaded there.



## Adding Submittal-Specific Documents

1. Determine if there are documents specific to this submittal to be uploaded. If yes, continue to #2.
2. Within the submittal, scroll to the bottom and expand the PS&E Review Documents submodule.

**PS&E Submittal List** (Click to collapse)  
[Return to PS&E Submittal List](#) [\[Edit\]](#) [\[Submit\]](#)

Submittal Number: SUBMITTAL 1  
 Is this a re-let project?: No  
 New Proposal ID: T1305  
 Status: Draft  
 PS&E District Comments Due Date:  
 Requested By: Eric Shimer  
 Created Date: 10/9/2020  
 Optional Notes:  
 Approval Managed By: Current Project  
 Include Transmittal Memo Information?:  Yes  No

- Contract File Index Information** (Click to expand) ↓
- Maintenance Agreement Executed Dates** (Click to expand) ↓
- Phase and Sequence for Submittal** (Click to expand) ↓
- Related ERC Submittals** (Click to expand) ↓
- District Reviews** (Click to expand) ↓
- Central Office Reviews** (Click to expand) ↓
- Comments** (Click to expand) ↓
- PS&E Review Document** (Click to collapse) ↑

No Documents Found  
[\[Upload Document\]](#)

3. Select the [Upload Document] link.
4. Browse for the file. Select Save.

**Upload PS&E Review Document**

File:  No file chosen  
 (Size Limit: 2GB)

Figure 14 Upload PS&E Review Document

<b>PS&amp;E Review Document</b> (Click to collapse)			
<a href="#">EDMS Doc No</a>	<a href="#">Created By</a>	<a href="#">Created Date</a>	<a href="#">Document Name</a>
10718164	Katrina Sadler	10/12/2020	LOCKDOWN REPORT FOR 2021.pdf <a href="#">View</a> <a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50  
[\[Upload Document\]](#)

Figure 15 Document List with Uploaded Document

### Adding CFI Documents

1. Scroll toward the bottom of the PS&E Package Module to the Proposal Documents and select the Contract File Index Documents submodule.
2. For the CFI documents that will be part of the Package, select the 'Included' radio button.
3. Select the [Upload New Version] link to open the upload documents modal.

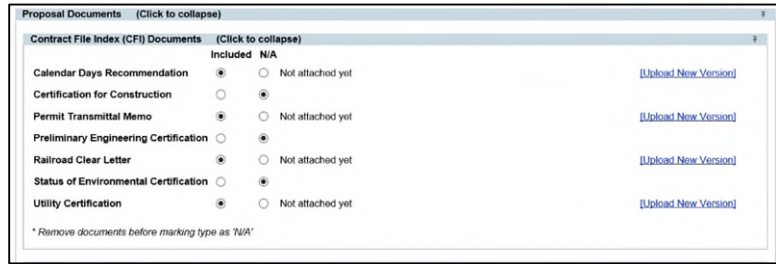


Figure 16 CFI Documents Area

4. Click the SELECT FILE button to browse for the file.
5. Click the SAVE button.

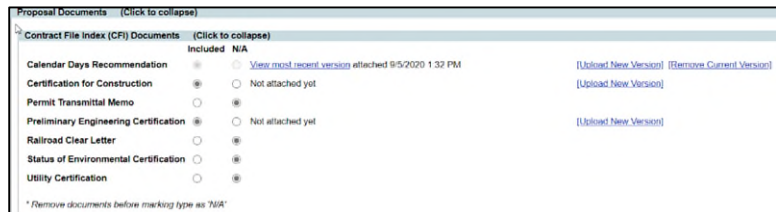


Figure 17 CFI Documents - Upload New Version

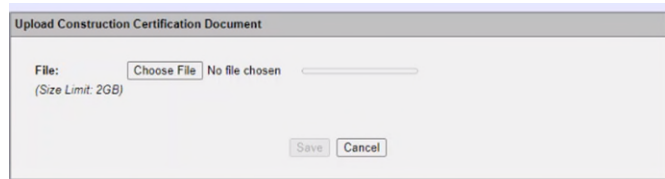


Figure 18 CFI Browse for File Modal

### Adding PS&E Submittal Documents

1. Scroll toward the bottom of the PS&E Package Module to the PS&E Submittal Documents submodule.
2. Select the [Upload Document] link.

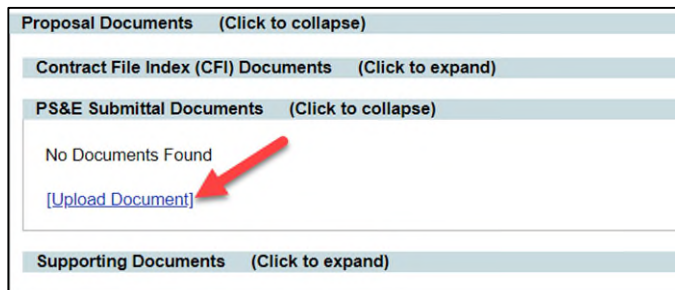


Figure 19 PS&E Submittal Documents Area

3. Click the SELECT FILE button to browse for the file.
4. Select the necessary file type for the document from the dropdown.
5. Click the SAVE button.

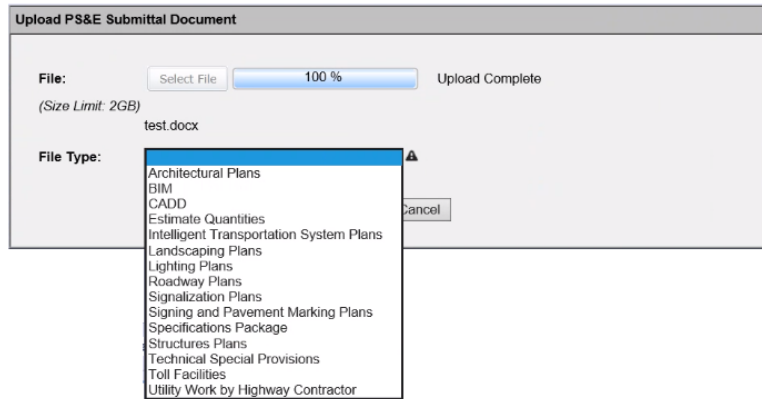


Figure 20 Submittal Documents - Browse for File Modal

### Adding Supporting Documents

1. Scroll toward the bottom of the PS&E Package Module to the Supporting Documents submodule.
2. Select the [Upload Document] link.

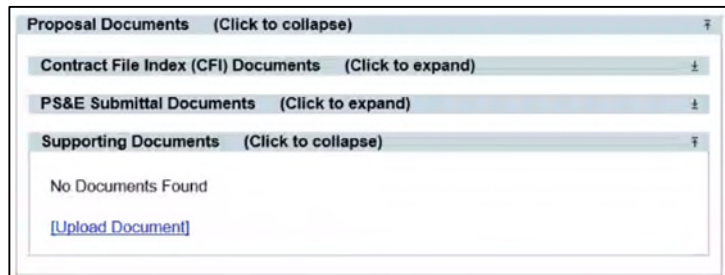


Figure 21 Supporting Documents Area

3. Click the CHOOSE FILE button to browse for the file.
4. Click the SAVE button.

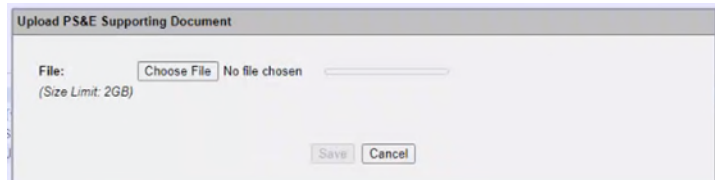


Figure 22 Supporting Documents - Browse for File Modal

## Generate the CFI Form

Before the creation of this module, there was a CFI Form completed, printed and 'handed-off' to the District PS&E Office. Now the form is completed by answering the questions above and completing the submodules.

1. Expand the Contract File Index Information submodule.
2. Select the [Generate Contract File Index Form] link.

PS&E Submittal List (Click to collapse)  
[Return to PS&E Submittal List](#) [Edit] [Submit]

Submittal Number: SUBMITTAL 1  
 Is this a re-let project?: No  
 New Proposal ID: T1305  
 Status: Draft  
 PS&E District Comments Due Date:  
 Requested By: Eric Shimer  
 Created Date: 10/9/2020  
 Optional Notes:  
 Approval Managed By: Current Project  
 Include Transmittal Memo Information?:  Yes  No

Contract File Index Information (Click to collapse) [Generate Contract File Index Form]

Project of Division Interest under agreements dated August 20, 2015:  Yes  No  
 Right of Way Certification mailed to State R/W Administrator:  Yes  No  
 Local Fund Agreement sent to Office of Comptroller:  Yes  No  N/A  
 Local Funds sent to Office of Comptroller:  Yes  No  N/A  
 Project requires a Maintenance Agreement:  Yes  No  N/A

Figure 23 Generate CFI Form

3. The form will open in a new tab.

While viewing the form onscreen, the print option allows the choice of Excel, Word or PDF.

4. Close the tab when finished viewing and/or printing.

CONTRACT FILE INDEX

Financial Project ID: 43999-2-03-01-43999-2-01  
 Proposal Contract ID: T1305

ATTACHMENTS (check if included or list expected date of transmittal to Central Office):  
 Calendar Days Recommendation  
 Certificate for Construction (Form 575-095-05)  
 Permit Transmittal Memo\*\*  
 Preliminary Engineering Certification\*  
 Railroad Clear Letter  
 Status of Environmental Certification  
 Utility Certification

No  Yes Projects of Division Interest under agreement dated August 20, 2015\*  
 No  Yes Right of Way Certification mailed to State R/W Administrator  
 No  Yes  N/A Local Funds Agreement sent to Office of Comptroller  
 No  Yes  N/A Local Funds sent to Office of Comptroller  
 No  Yes  N/A Project requires a Maintenance Agreement.  
 If yes, a Maintenance Agreement (   3   ) was executed on 12/12/202; 10/5/2019; 6/14/2020

\* Include if federally funded.  
 \*\* Must have District Secretary Approval if Permits are not received by Authorization to Advertise (Federally Funded Projects Only).  
 Note: If project is federally funded and has a state funded "Goos VMS", please provide the same documentation as required for a federally funded project.

Name: Eric Shimer  
 Project Manager

Generated on: 10/9/2020 2:33:58 PM

Figure 24 CFI Form - On Screen

### Notes if information is missing from the CFI Form:

- a. Financial Project ID missing: Revisit the Phase and Sequence for Submittal submodule to ensure the correct selection has been made.
- b. Attachments: Revisit the CFI Documents submodule. In order for the 'X' to appear, the Include radio button must be selected AND the document must be uploaded.
- c. Yes/No Questions: Revisit the Contract File Index Information submodule to correct answers.
  - i. If the question about Maintenance Agreements is Yes and the number of agreements is ZERO: Revisit the Maintenance Agreement Executed Dates submodule to enter the Agreement Dates. The count is based on the number of dates entered.

## Confirm District Reviews

1. Expand the District Reviews submodule

The screenshot displays the 'District Reviews' submodule expanded into four sections, each with a 'Click to collapse' link and a 'Status Date' of 10/9/2020.

- Plans Review:** Status: Pending. No Assignments currently exist. Includes an [\[Add Assignment\]](#) link.
- Specification Review:** Status: Pending. Includes a table with one row:
 

Assignment Type	Reviewer	Candidate Group	Status	Comments	Completed Date	
Reviewer	D2-Specs		Pending			<a href="#">[Remove]</a>

 Includes an [\[Add Assignment\]](#) link.
- Estimates Review:** Status: Pending. Includes a table with one row:
 

Assignment Type	Reviewer	Candidate Group	Status	Comments	Completed Date	
Reviewer	D2-Estimates		Pending			<a href="#">[Remove]</a>

 Includes an [\[Add Assignment\]](#) link.
- FYI Assignment:** User: Star Ayers. Includes a [\[Remove\]](#) link and an [\[Add Assignment\]](#) link.

Figure 25 District Reviews submodule Expanded

2. Look over and confirm the necessary reviewers are listed. (PMs may modify review assignments by default. )
  - a. Select [\[Remove\]](#) link to delete a reviewer or FYI assignment.
  - b. Select [\[Add Assignment\]](#) under the appropriate review section to include additional reviewers.
  - c. Select [\[Add Assignment\]](#) under the FYI Assignment to copy additional users to make them aware of the submittal.

## Submitting the Request

The last step is to submit the Package and begin its review.

1. Scroll to the top of the PS&E Package Module.
2. Select the [SUBMIT] link in the top right corner.

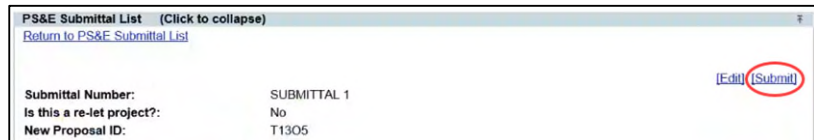


Figure 26 Submit Link

3. Confirm the Status of the Submittal is PS&E DIST - IN REVIEW. This status means the review assignments have been sent to the reviewer(s) listed under District Reviews submodule.

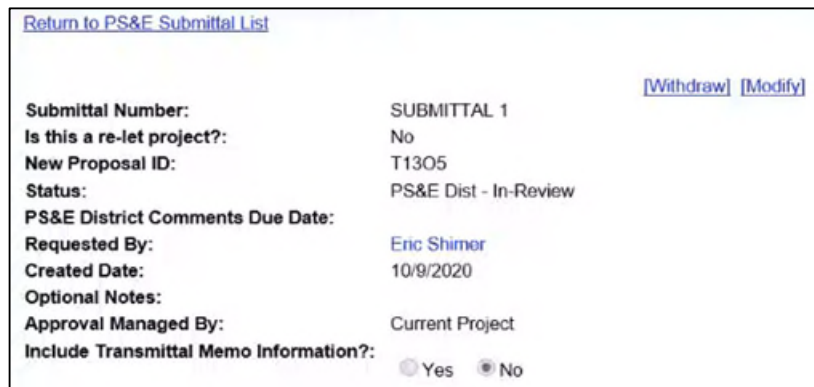


Figure 27 After Submit Screen

## Additional Actions After Submitting

### Withdraw

If there are major changes needed but the PM, EOR or Requestor feels it is necessary to keep the original submittal, the Withdraw action should be used. This action will change the status to Withdrawn and the original submittal cannot be edited or resubmitted. The system will create a **new** submittal as a duplicate from the original and the PM, EOR or Requestor will start the approval process again.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Withdraw] link.
3. A confirmation box will appear to confirm to WITHDRAW the submittal.
4. Select OK, if that was the intent.

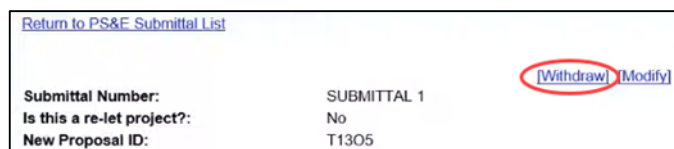


Figure 28 Withdraw Link

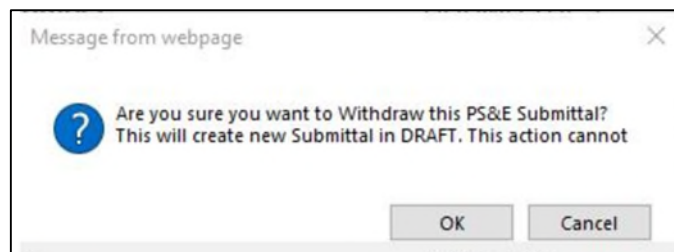


Figure 29 Withdraw Confirmation Message

## Modify

If the PM, EOR or Requestor realizes there are changes/corrections needed after the SUBMIT link is selected, the use the “Modify” action. This feature pulls the submittal back from the District PS&E Review. The reviewer’s status changes to Pending and the PS&E Submittal Package status is Under Modification.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.

2. Select the [Modify] link. This will set the status back to one similar to DRAFT.

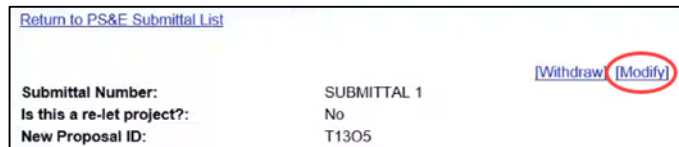


Figure 30 Modify Link

3. A confirmation box will appear to confirm that this is the action needed.
4. Select OK, if that was the intent. The status changes to ‘Under Modification’.

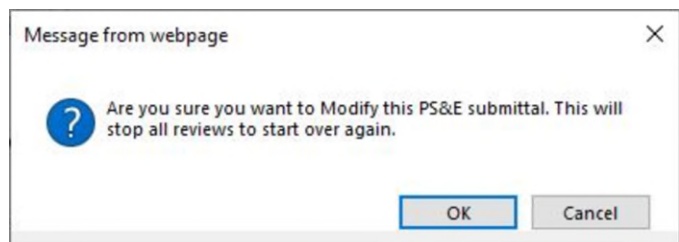


Figure 31 Modify Confirmation Message

5. Select the [Edit] link. Make changes/corrections.
6. Select the [Submit] link to place the PS&E Package Submittal back in the review cycle.

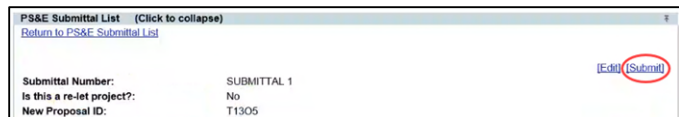


Figure 32 Edit and Submit after Modification

## ADDING A REVISION:

As mentioned in the beginning of this help document, there are times when a Package requires changes AFTER it has reached the Contracts Office. To do so, a Revision will be entered similar to adding a submittal. The revision could be requested by Contracts or initiated by the PM, EOR, Requestor, or the District PS&E Lead.

### Add A Revision

The option to 'Add PS&E Submittal' will be visible in the PS&E Submittal List submodule.

1. With the PS&E Module open for the LEAD project, Select the [Create a Revision] link.



Plans, Specifications, and Estimates (PS&E) Package (Click to collapse)										
PS&E Submittal List (Click to collapse)										
	New Proposal ID	Financial Number	Associated Projects	Submitted Date	Optional Notes	Status	Status Date	Submittal Managed By	Requested By	Comments Due Date
<a href="#">View</a>	SUBMITTAL 1	T1305 433899-2-52-01, 433899-2-57-01		10/12/2020		Received By CO Contracts	10/12/2020	Current Project	Eric Shimer	
<a href="#">[Add PS&amp;E Submittal]</a> <a href="#">[Create a Revision]</a>										


2. A new popup modal appears. This is where the details of the Revision are entered. The  icon indicates fields that are required to save the Revision.

Figure 33 Revision Detail Popup Modal



**Revision Date:** This is the date the Revision is made.

**Is this a Mandatory Revision?:** Yes/No. By default, No is selected.

**Did the District Specification Engineer review the effects on the Specifications Package and determine that the package revision is not required?:** Yes/No/Not Applicable. By default, No is selected.

**Did the Director of Transportation Development concur?:** Yes/No/Not Applicable. By default, No is selected.

**If Project of Division Interest, is it authorized by the FHWA Engineer?:** Yes/No/Not Applicable. By default, No is selected.

**If the revision is within 15 days of letting, is this approved by District Secretary?:** Yes/No/Not Applicable. By default, No is selected.

**If the revision is within 5 days of letting, is this approve by the Director of Design?:** Yes/No/Not Applicable. By default, No is selected.

**Does this Revision include a Supplemental Specification Package?:** Yes/No. By default, No is selected.

*If Yes is selected, an input field will appear to enter the Supplemental Specification Package Number.*

**Does this revision include a Reissued Specifications Package?:** Yes/No. By default, No is selected.

**Does this Revision include Plans Revision?:** Yes/No. By default, No is selected.

*If Yes is selected, an input field will appear to enter the Plans Revision Number.*

**Does this revision include a reissued estimate of quantities report?:** Yes/No. By default, No is selected.

**Reissued BIM.ZIP?:** Yes/No. By default, No is selected.

**Reissued CADD.ZIP?:** Yes/No. By default, No is selected.

**Is the Contract Time Revised?:** Yes/No. By default, No is selected.

*If Yes is selected, an input field will appear to enter the updated Total Number of Calendar Days.*

3. Select workflows. If no workflow or only one workflow is set, this selection will be automatically set.
4. Select the SAVE button. The submittal is now saved as a DRAFT and is visible in the PS&E Submittal List.
5. Select the VIEW link next to the revision created above. This will open the revision for the details to be added.

The screenshot shows a web application window titled "Plans, Specifications, and Estimates (PS&E) Package (Click to collapse)". It displays a table with the following data:

View	PS&E Submittal List	New Proposal ID	Financial Number	Associated Projects	Submitted Date	Optional Notes	Status	Status Date	Submittal Managed By	Requested By	Comments Due Date
<a href="#">View</a>	SUBMITTAL 1	T1305	433899-2-52-01, 433899-2-57-01		10/12/2020		Revision Requested	10/12/2020	Current Project	Eric Shimer	
<a href="#">View</a>	REVISION 1	T1305	433899-2-52-01, 433899-2-57-01				Draft	10/12/2020	Current Project	Eric Shimer	<a href="#">[Remove]</a>

Figure 34 Submittal List with Revision

## Updating Details in Submodules

The details entered for the last PS&E Submittal will be copied into the Revision. While the Revision is in a DRAFT status, the submodules can be updated if needed.

### Editing Revision Details

1. Expand the Revision Memo Details submodule.
2. Select the [Add/Update Revision Memo] link.

Revision Memo Details (Click to collapse)

[Add/Update Revision Memo](#) [\[Generate Revision Memo\]](#)

Revision Date: 10/1/2020

Is this a Mandatory Revision?:  Yes  No

Did the District Specification Engineer review the effects on the Specifications Package and determine that the package revision is not required?:  Yes  No  N/A

Did the Director of Transportation Development concur?:  Yes  No  N/A

If Project of Division Interest, is it authorized by the FHWA Engineer?:  Yes  No  N/A

If the revision is within 15 days of letting, is this approved by District Secretary?:  Yes  No  N/A

If the revision is within 5 days of letting, is this approved by Director of Design?:  Yes  No  N/A

Does this Revision include a Supplemental Specifications Package?:  Yes  No

Does this revision include a Reissued Specifications Package?:  Yes  No

Does this include Plan Revision?:  Yes  No

Does this revision include a Estimated Quantities report?:  Yes  No

Reissued BIM.Zip?:  Yes  No

Reissued CADD.Zip?:  Yes  No

Is the Contract Time Revised?:  Yes  No

Supplemental Specifications Package Number: 1

Plans Revision Number: 1

Total Number of Calendar Days: 202

Plans Revisions (Click to expand)

Supplemental Specifications (Click to expand)

Summary of Quantities (Click to expand)

Figure 35 Edit Revision Details

3. The popup modal will appear. Make changes.
4. Select the SAVE button to hold the changes.

### Adding Plans Revision Details

1. Expand the Plans Revisions submodule within the Revision Memo Details submodule.
2. Select the [Add Plans Revision Entries] link.

Plans Revisions (Click to collapse)

Currently there are no Plan Revisions for this PS&E Revision

[\[Add Plans Revision Entries\]](#) \*5 entries can be added at once

Figure 36 Add Plan Revision Link

3. A popup modal will appear. Select the correct FPID from the dropdown. Enter Sheet Number. Enter Revision Date. Enter Description. Only 5 entries at a time can be entered.
4. If you start to enter an FPID, you must complete the remainder of the information for the record.
5. Select the SAVE button to hold the changes.

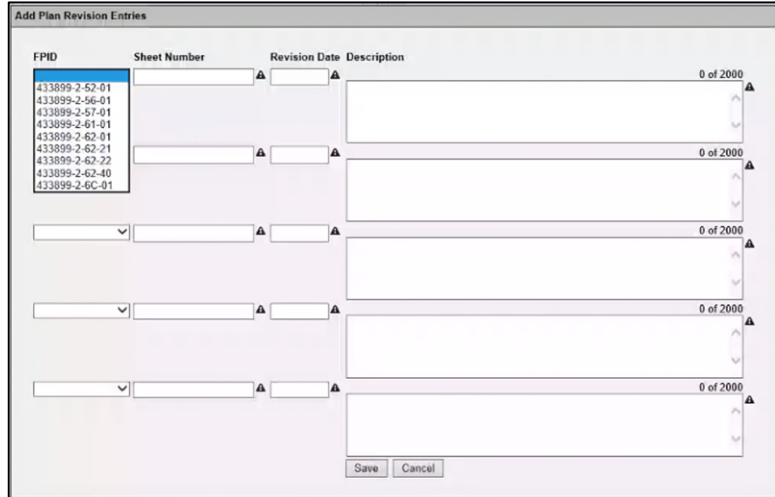


Figure 37 Plan Revision Entries popup

6. Repeat if more entries are needed.

### Adding Supplemental Specifications Details

1. Expand the Supplemental Specifications submodule within the Revision Memo Details submodule.
2. Select the [Add Supplemental Specification Entries] link.

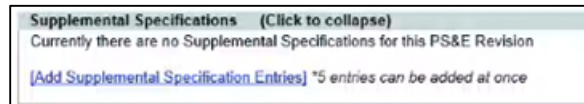


Figure 38 Add Supplemental Specifications Details

3. A popup modal will appear. Enter Sheet Number. Enter Revision Date. Enter Description. Only 5 entries at a time can be entered.
4. If you start to enter a Sheet Number, you must complete the remainder of the information for the record.
5. Select the SAVE button to hold the changes.
6. Repeat if more entries are needed.

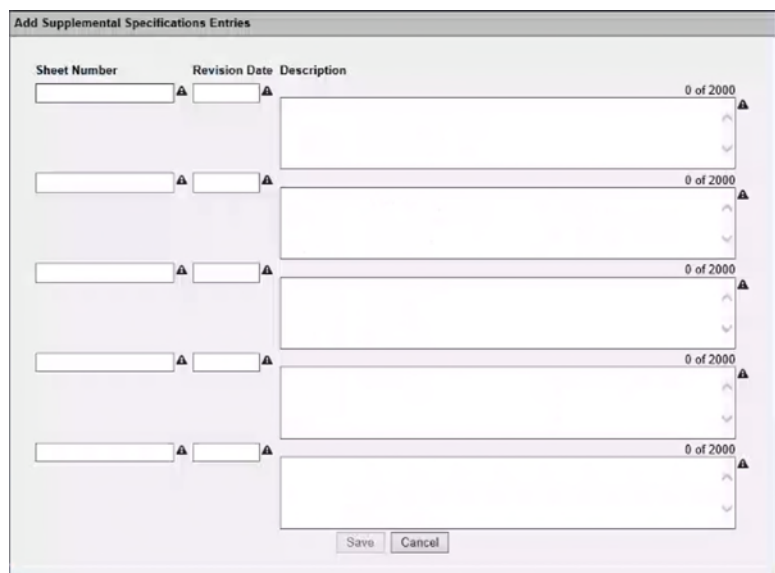


Figure 39 Supplemental Specifications Entries popup

## Adding Summary of Quantities Details

1. Expand the Summary of Quantities submodule within the Revision Memo Details submodule.
2. Select the [Add Summary of Quantities Entries] link.

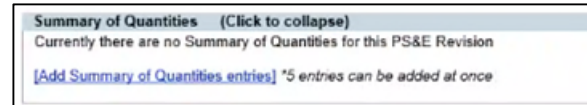


Figure 40 Add Summary of Quantities Details

3. A popup modal will appear. Select FPID from the dropdown. Enter Pay Item. Select Addition, Deletion, or Revision from dropdown. Enter the Old Quantity and the New Quantity.

Figure 41 Summary of Quantities Entries

**NOTE:** Only 5 entries at a time can be entered.

4. If you start to enter an FPID, you must complete the remainder of the information for the record.
5. Select the SAVE button to hold the changes.
6. Repeat if more entries are needed.

## Editing Revision Details

1. If any of the revision details in the top section or the Contract File Index Information submodule need to be updated/revised, select the [Edit] link. This will open the popup modal for editing.
2. Make changes.
3. Select the SAVE button to hold the changes.

## Editing Contract File Index (CFI) Information

1. You can also edit by expanding the CFI area.
2. Select from the Yes, No or N/A items. A selection will close the submodule

Figure 42 Editing CFI Information

3. If the project requires a maintenance agreement, you can add the dates the agreements were executed. Select the [Add Agreement Executed Dates] link. You can enter up to three dates at a time. To add more dates, reselect the [Add Agreement Executed Dates] link ..

## Editing Financial Number(s)

1. Expand the Phase and Sequence for the submittal submodule.
2. Select the [Add Phase and Sequence] link.

Figure 43 Add Phase and Sequence Link

3. The pre-filtered list of ALL available phase and sequence combinations currently programmed in the FM system will appear. *This pre-filtered list is limited to only the 5X, 6X and 7X phases. The list will include the phase and sequences from the lead project and all projects which are set as Let Together (LT) in the Related Items Module.*
4. Click the checkbox for each financial number to be included.


Figure 44 Phase & Sequence Pre-Filtered List

### Removing Financial Number(s)

1. Expand the Phase and Sequence submodule.
2. Select the [Remove] link next to the Financial Number to be removed.
3. A warning message will display to confirm the removal. Click OK, if removal was the intent.

*Figure 45 Remove Financial Project*

### Updating Transmittal Memo Details

1. Select the [Update Transmittal Memo] link.
2. A modal will appear to enter Transmittal Details. The  indicates fields are required to save the entry.
3. Select the SAVE button.

*Figure 46 Update Transmittal Memo Link*

*Figure 47 Transmittal Memo Details Modal*

## Upload Documents

### Adding Submittal-Specific Documents

1. Determine if there are documents specific to this submittal to be uploaded. If yes, continue to #2.
2. Within the submittal, scroll to the bottom and expand the PS&E Review Documents submodule.

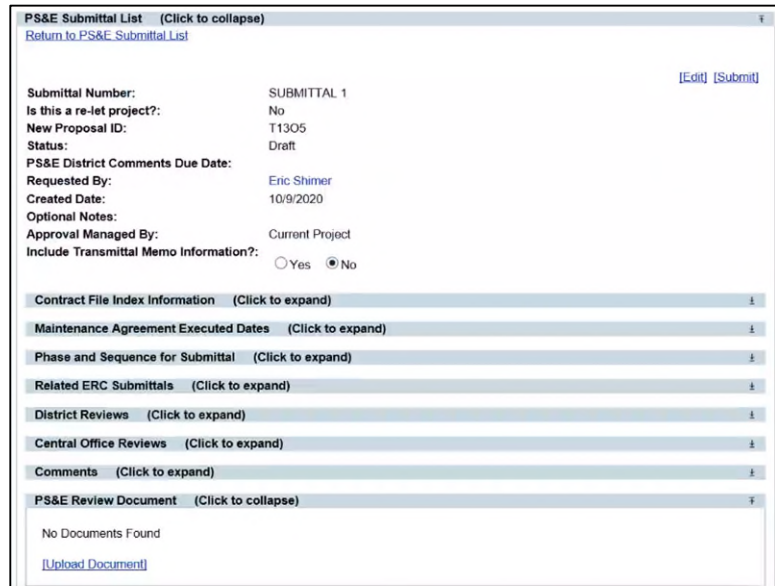


Figure 48 Upload Document link

3. Select the [Upload Document] link.
4. Select "Choose File", browse for the file, and select Save.

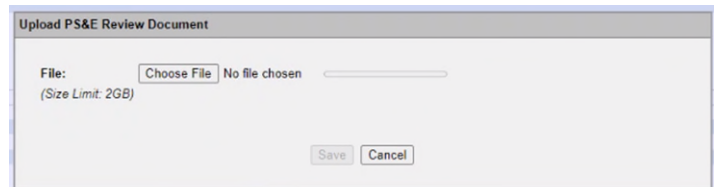


Figure 49 Upload PS&E Review Document



Figure 50 Document List with Uploaded Document

### Adding CFI Documents

1. Scroll toward the bottom of the PS&E Package Module to the Proposal Documents, and select the Contract File Index Documents submodule.
2. For the CFI documents that will be part of the Package, select the 'Included' radio button.

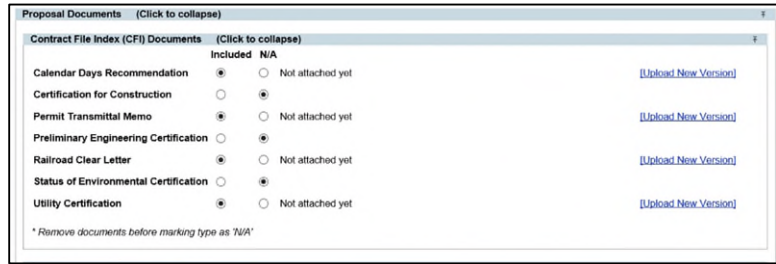


Figure 51 CFI Documents Area

3. Select the [Upload New Version] link to open the upload modal.

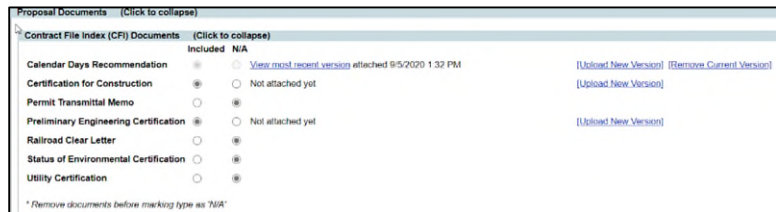


Figure 52 CFI Documents - Upload New Version

4. Click the CHOOSE FILE button to browse and upload a file.
5. Click the SAVE button.

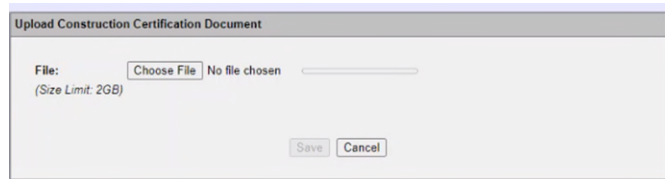


Figure 53 CFI Browse for File Modal

### Adding PS&E Submittal Documents

1. Scroll toward the bottom of the PS&E Package Module to the PS&E Submittal Documents submodule.
2. Select the [Upload Document] link.

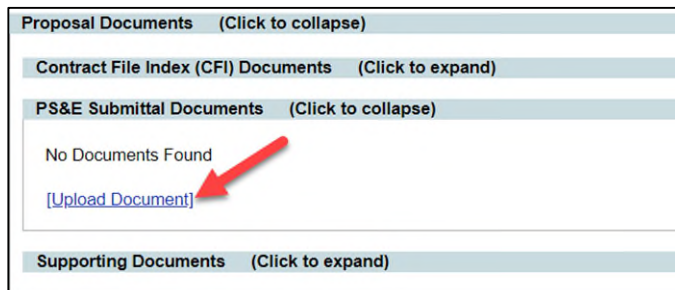


Figure 54 PS&E Submittal Documents Area



3. Click the CHOOSE FILE button to browse for the file.
4. Select the necessary file type for the document from the dropdown.
5. Click the SAVE button.

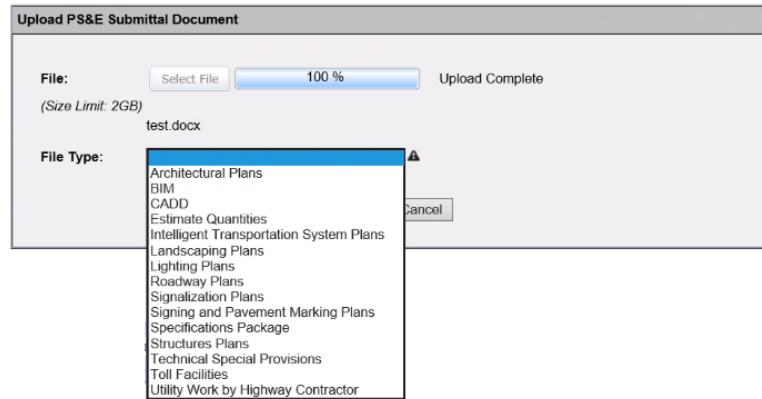


Figure 55 Submittal Documents - Browse for File Modal

### Adding Supporting Documents

1. Scroll toward the bottom of the PS&E Package Module to the Supporting Documents submodule.
2. Select the [Upload Document] link.

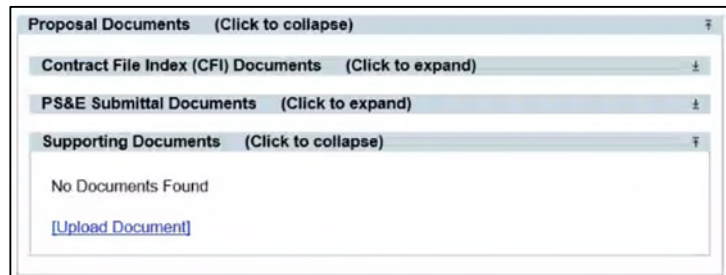


Figure 56 Supporting Documents Area

3. Click the CHOOSE FILE button to browse for the file.
4. Click the SAVE button.

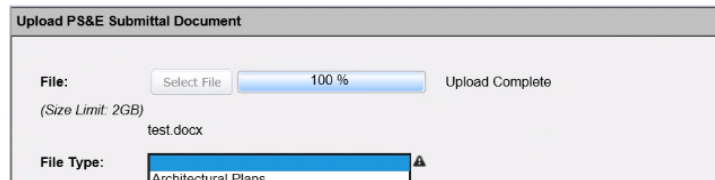


Figure 57 Supporting Documents - Browse for File Modal

### Generate the Revision Memo

Before the creation of this module, there was a Revision Memo completed, printed and ‘handed-off’ to the District PS&E Office. This form required many ‘wet’ signatures for completion. Now the form is completed by answering the questions above and completing the submodules. In place of the ‘wet’ signatures there is a statement of certification which states: *“By transmittal of this Revision Package it is certified that applicable approvals, authorizations or concurrences have been obtained and that the required documentation can be produced upon request.”* The method of documentation is left to the District’s discretion. It could be, but not limited to, email, scanned copy with ‘wet’ signatures, and/or inclusion of individuals are part of the review at the respective levels.

1. Expand the Revision Memo Details submodule.

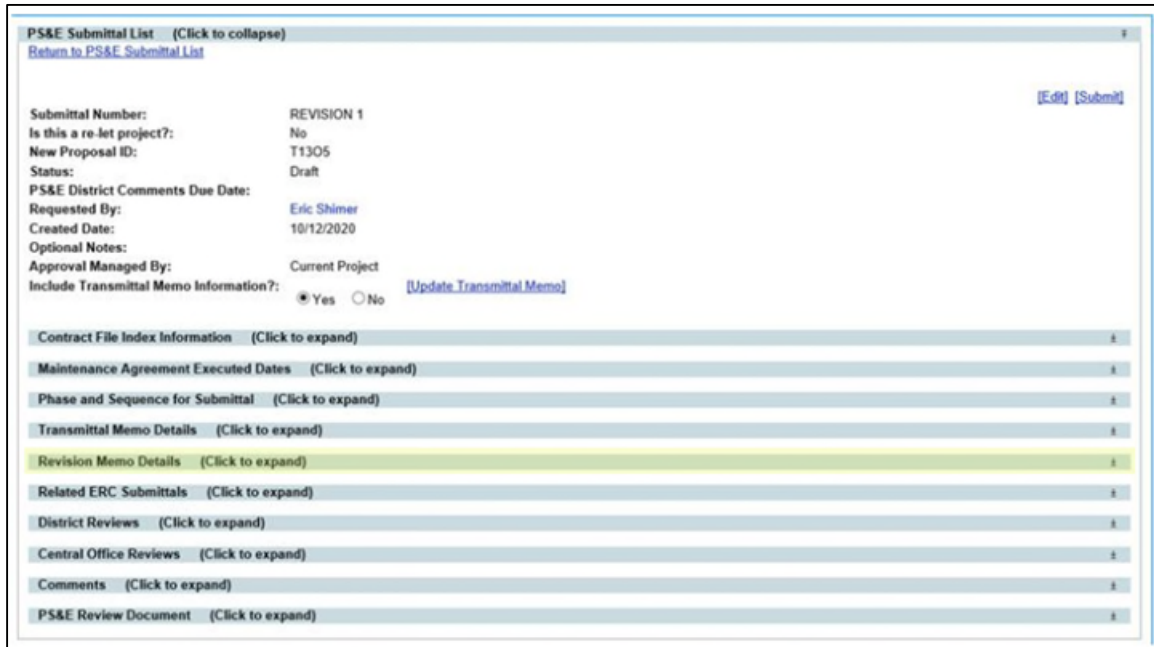


Figure 58 Revision Memo Submodule

2. Select the [Generate Revision Memo] link.
3. The form will open in a new tab.
4. While viewing the form onscreen, print option allows the choice of Excel, Word or PDF.

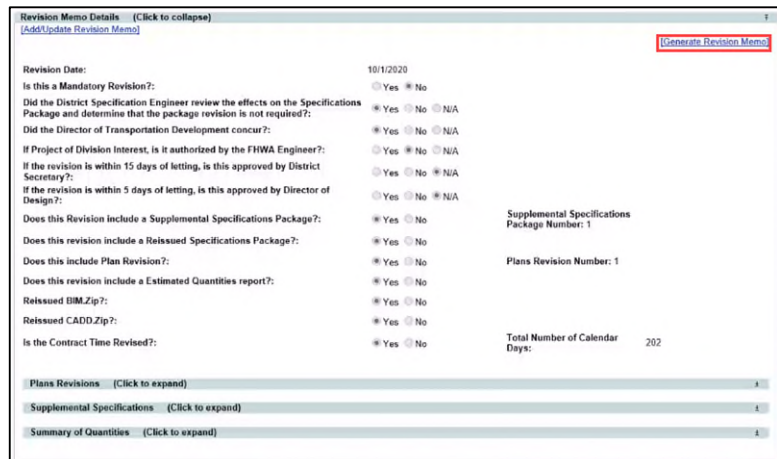


Figure 59 Generate Revision Memo Link

Figure 60 Revision Memo Page 1 On Screen

FPID	Sheet Number	Revision Date	Description
438002-52-01	12	10/2/2020	Add information details here

Sheet Number	Revision Date	Description
00	10/1/2020	Add more information in this box

FPID	Pay Item	Addition / Deletion / Revision	Old Quantity	New Quantity
438002-52-01	421ABC abc	Addition	0	25

Figure 61 Revision Memo Page 2 On Screen

5. Close the tab when finished viewing and/or printing.

**Notes if information is missing:**

- a. Financial Project ID missing: Revisit the Phase and Sequence for Submittal submodule to ensure the correct selection has been made.
- b. Yes/No Questions: Revisit the [Add/Update Revision Memo] link to modify answers.

**Confirm District Reviews**

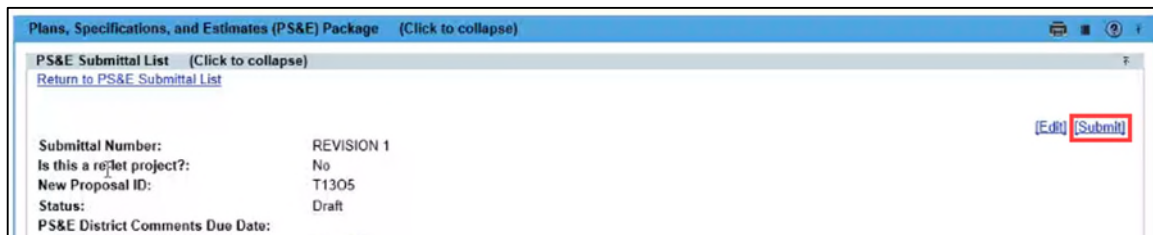
1. Expand the District Reviews submodule.

2. Look over and confirm the necessary reviewers are listed. (*PMs may modify the reviews assigned by default.*)
  - a. Select [Remove] link to delete a reviewer or FYI assignment.
  - b. Select [Add Assignment] under the appropriate review section to include additional reviewers.
  - c. Select [Add Assignment] under the FYI Assignment to copy additional users to make them aware of the submittal.

## Submitting the Revision

The last step is to submit the Revision and begin its review.

1. Scroll to the top of the PS&E Package Module.



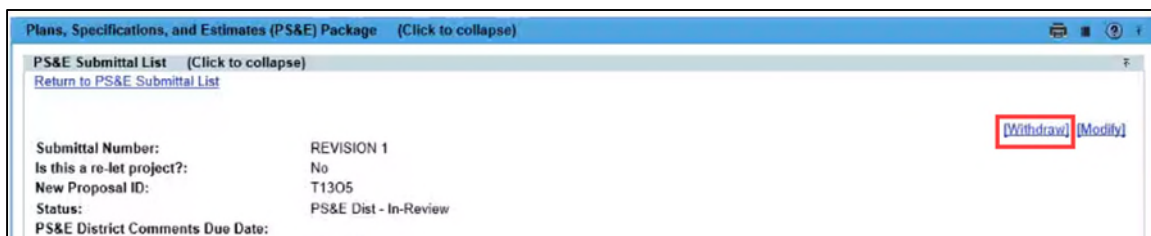
2. Select the [SUBMIT] link in the top right corner.
3. Confirm the status of the Submittal is PS&E DIST - IN REVIEW. This status means the review assignments have been sent to the reviewer(s) listed under the District Reviews submodule.

## Additional Actions after Submittal

### Withdraw

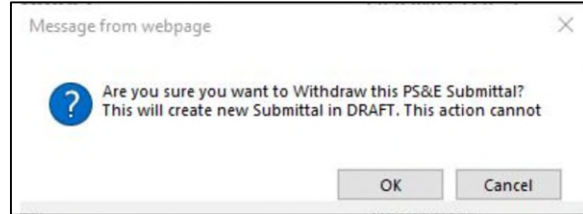
The Withdraw action should be used when there are major changes needed, but the PM, EOR or Requestor feels it is necessary to keep the original submittal.. This action will change the status to Withdrawn and the original submittal cannot be edited or resubmitted. A new submittal will be created (a duplicate of the original) in a status of Draft for the PM, EOR or Requestor to begin a new submittal.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.



2. Select the [Withdraw] link.

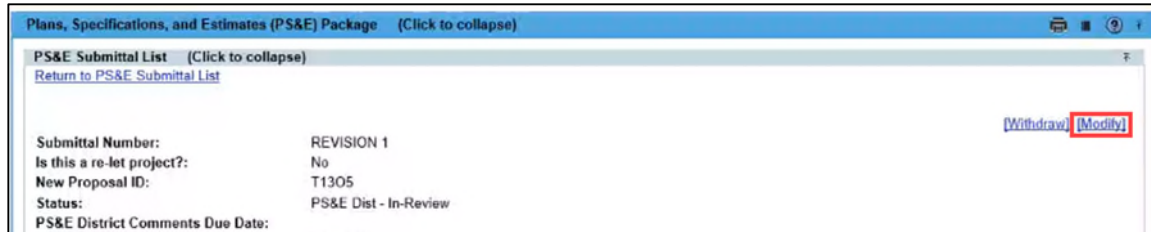
3. A confirmation box will appear for the Lead to confirm they would like to modify.
4. Select OK, if that was the intent.



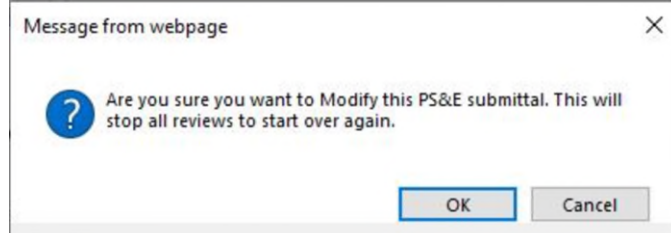
## Modify

The Modify action should be used if the PM, EOR or Requestor realizes there are changes/corrections needed after the SUBMIT link is selected. This feature pulls the submittal back from the District PS&E Review. The reviewers' statuses change to Pending and the PS&E Submittal Package changes to Under Modification.

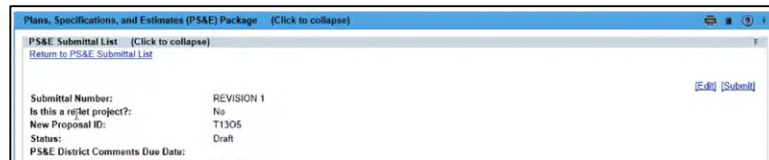
1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.



2. Select the [Modify] link. This will set the status back to one similar to DRAFT.
3. A confirmation box will appear for the user (the Lead) to confirm they would like to modify the submittal.



4. Select Yes, if that was the intent. The status changes to 'Under Modification'.
5. Select [Edit] link to make changes/corrections.
6. Select the [Submit] link to place the PS&E Package Submittal back into the review cycle.



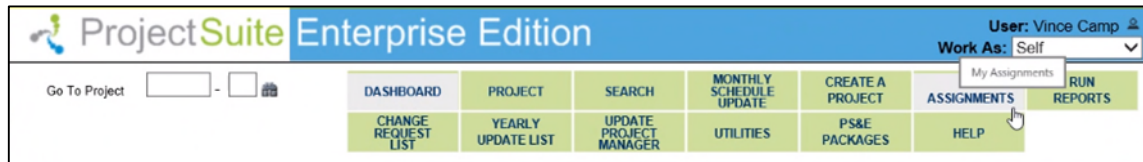
## DISTRICT LEVEL REVIEWS

The first level of reviews of a submittal or revision is performed by the District PS&E Office staff. These users' roles could be Reviewer, FYI or District Lead.

### Receiving Assignments

When a review assignment changes from PENDING to IN REVIEW, the application will automatically send the Reviewer an email to notify that an assignment is ready. FYI assignments receive an automatic email when a PS&E submittal is submitted. The Lead(s) can see the current status of the review.

1. Select the MY ASSIGNMENT button in the global toolbar.



2. Assignments will be listed in the "PS&E Reviewer Assignment" submodule.
3. Select the VIEW link for the project. If more than one, refer to the subject line of the email.

Vince Camp's Assignments (Click to collapse)

[See Assignments for Other User]

Change Request - Reviewer (Click to expand)

Change Request - FYI (Click to collapse)

Request Type: [All]

Project	Request Type	Reason	Submitted Date	Description
<a href="#">View</a> 428455-1	Funding	Supplemental Agreement	9/2/2020	Request funding and authorization in the amount of \$27,147.45 for Phase 52 Sequence 01 for the addi...
<a href="#">View</a> 209301-3	Funding	Other	8/31/2020	Requesting funding and authorization for Phase 52 Sequence 01 in the amount of \$59,579.03 Federal fu...
<a href="#">View</a> 211079-6	Funding	Initial	8/26/2020	Please authorize \$495,852 in phase 32-02 funding for contract CA557 TWD 20.
<a href="#">View</a> 209301-3	Funding	Supplemental Agreement	8/26/2020	Request funding and authorization in the amount of \$728,269.77 for Phase 52 Sequence 01 to add Pay L...
<a href="#">View</a> 435575-1	Critical Schedule	Management Directed	8/11/2020	Move Lot date from October 2021 to March 2022 to align with 446044-1
<a href="#">View</a> 447031-7	Critical Schedule	Management Directed	6/18/2020	None.
<a href="#">View</a> 447031-4	Critical Schedule	Management Directed	6/18/2020	None.
<a href="#">View</a> 428271-2	Project Info	Management Directed	2/10/2020	Please program a candidate design phase at \$1.8M in the new 5th year for the time being. I have atte...
<a href="#">View</a> 437728-2	Project Info	Change/Revision Scope Of Work	9/28/2019	Reduce budget from \$2M to \$1,832,000 based upon conversation with Karin Lee on 9/25/19 to assist Dis...

Page 1 (Showing Items 1 to 9 of 9) Show per page 10 25 50

Pending Requests (Click to expand)

PS&E Reviewer Assignment (Click to collapse)

Project	Contract Class	Submittal Number	Item Segment Description	State Road Number	Status	Review Type	Review Sub Type	Optional Notes	Assignment Type	Submitted Date	PS&E District Comments Due Date	Transmittal Date
<a href="#">View</a> 433899-2	TALLAHASSEE LET	SUBMITTAL 1	I-95(SR9) @ SR115 (US1) ML KING/20TH STREET	OS 115	PS&E Dist - In-Review	PS&E Review	Specification Review		Reviewer	10/9/2020		08/15/2022

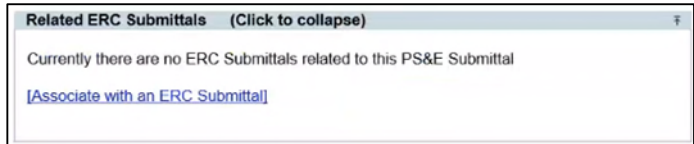
4. The submittal to be reviewed will open within the PS&E Package Module.
5. Review the overview information.

### Adding ERC Link

For District which use the Electronic Review Comment (ERC) application for capturing the review comments and resolutions for the PS&E submittal reviews, the ability to add a link to ERC exists.

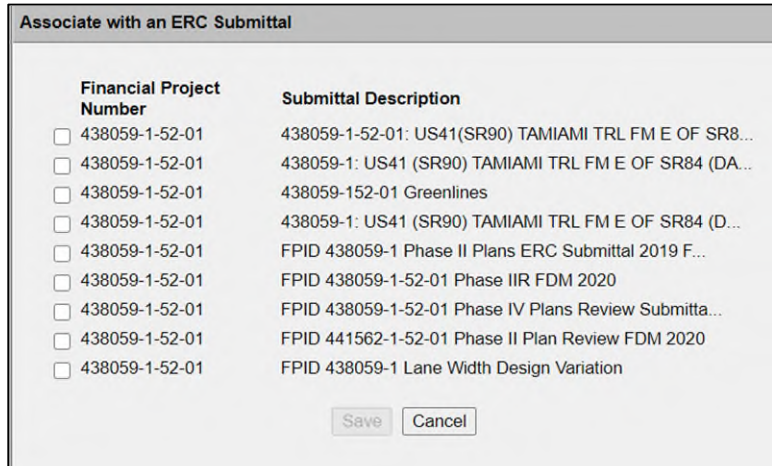
1. Create the ERC Review in the ERC application.

2. Expand the Related ERC Submittal submodule.



3. Select the [Associate with an ERC Submittal] link.

4. Plans Processing Office can associate a submittal to an ERC Submittal. From the list of ERC submittals for the Project, click in the checkbox of the ERC review for this PS&E Package Submittal.

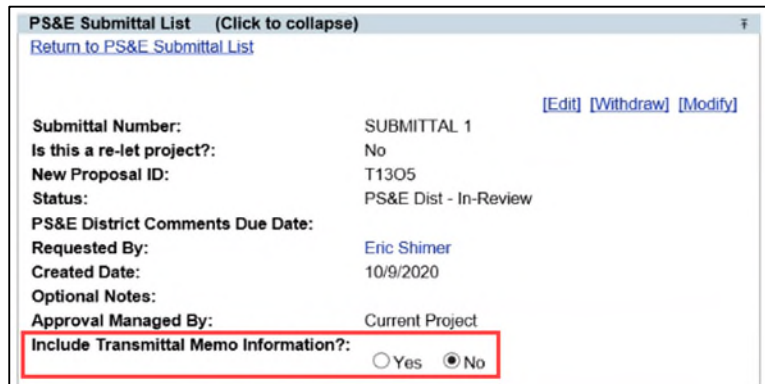


5. Once you select “Associate with an ERC Submittal”, the system displays a list of ERC submittals. Select the correct ERC submittal to associate with this Package submittal.

### Adding Transmittal Memo Details

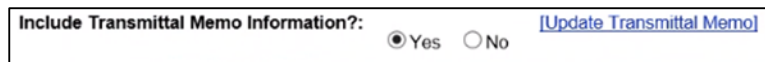
When possible the information contained on the Transmittal Memo is pulled from the FM system to reduce the data entry and opportunity for entry errors. However some details are not captured and stored elsewhere. For these items it is necessary to have them entered.


1. In the top section of the PS&E Submittal, the last question is ‘Include Transmittal Memo Information?’. By default this is set to ‘No’.



2. Select the ‘YES’ radio button.

3. Select the [Update Transmittal Memo] link.



4. A modal will display to enter Transmittal Details. The  indicates fields are required to save the entry.

**Date Memo Created:** Enter the date in the MM/DD/YYYY format or use the calendar picker.

**State Road Number(s):** Enter each State Road Number with a comma between them.

**Total Roadway Length:** Enter the length in miles.

**Total Bridge Length:** Enter the length of the bridge(s) in miles.

**Total Project Length:** Enter the total project length in miles.

**Verified By:** Enter the name of who verified the lengths and select from the name selector.

**Authorized by FHWA Engineer:** Enter the name of the FHWA Engineer who gave authorization and select from the name selector.

**Authorization Date:** Date authorization given by FHWA.

**Contract Time (in Days):** Enter the number of contract days set in the Contract Time Memo from the Construction Office.

**Acquisition Time:** Select the correct type of acquisition from the dropdown. Choices include Flexible Start Date, Other Acquisition Time, Special Start Date, Standard Acquisition Time.

**If Flexible Start Date is selected:** Enter the number of Days for Acquisition.

**If Other Acquisition Time is selected:** Enter the number of Days for Acquisition.

**If Special Start Date is selected:** Enter the date in the Special Start Date field.

**If Standard Acquisition Time is selected:** '15' will automatically be added to the Number of Days field.

**Wage Rate:** Enter the wage rate.

**Pre-Bid Conference Mandatory:** The default is set to 'No'. Click the radio button if the answer should be 'Yes'. If Yes is selected:

**Pre-Bid Conference Date/Time:** Enter the date and time of the pre-bid conference.

**Contact Person for Conference:** Enter the name of the person who is the contact for the conference and select from the name selector.

**Contact Phone Number for Conference:** Enter the phone number where the conference contact person can be reached.

**Location of Conference:** An open text box with 2,000 characters is available to enter location details of where the conference will be held.



**Modified Special Prevision:** The default is set to 'No'. Click the radio button if the answer should be 'Yes'.

**Special Notes and Requirements:** This is an open text box with a max of 4,000 characters.

5. Select the SAVE button.

## Generate the Transmittal Memo Form

Before the creation of this module, there was a Transmittal Memo completed, printed and 'handed-off' to the District PS&E Office. Now the form is completed by filing in the popup in the prior section.

1. Expand the Transmittal Memo Details submodule.
2. Select the [Generate Transmittal Memo Form] link.
3. The form will open in a new tab.

**Transmittal Memo Details** (Click to collapse)  
 [Add/Update Transmittal Memo] [Generate Transmittal Memo Form]

Date Memo Created: 9/30/2020  
 Financial Project Numbers: 433899-2-52-01, 433899-2-57-01  
 State Road Numbers: SR XX  
 Total Roadway Length: 10(mi.)  
 Total Bridge Length: 1(mi.)  
 Total Project Length: 11(mi.)  
 Verified By:  
 Workmix: 0236 - INTERCHANGE - ADD LANES  
 Authorized By FHWA Engineer:  
 Authorization Date:

**CONTRACTS OFFICE INFORMATION**  
 Contract Time (in Days): 120  
 Acquisition Type: Standard Acquisition Time  
 Number of Days: 15  
 Wage Rate: \$12.00  
 Business Development Initiative Project?: No  
 Alternative Contracting?: No  
 Pre-Bid Conference Mandatory?:  Yes  No  
 Pre-Bid Conference Date/Time: 10/30/2020 9:00 AM  
 Contact Person for Conference: James Driggers Jr.  
 Contact Phone Number for Conference: 9041234569  
 Location of Conference: Second Floor  
 First Building  
 789 Street A  
 Tallahassee, Florida  
 Modified Special Provision:  Yes  No  
 Special Notes and Requirements:

4. While viewing the form onscreen, print option allows the choice of Excel, Word or PDF.
5. Close the tab when finished viewing and/or printing.

TRANSMITTAL OF PLANS, SPECIFICATIONS AND ESTIMATE S PACKAGE

AD Day x 30DA

DATE: 09/30/2020

Project/Contract ID: T1308 Letting Date: 10/7/2022 Re Let: No

County: DUBL State Road No: SR XX

Federal Funds: Yes Federal Aid No: 0218-125-R 0218-023-R

Total Roadway Length: 10 (mi.) Total Bridge Length: 1 (mi.)

Total Project Length: 11 (mi.) Total Project Length Verified by:

Project Manager Name and Phone Number: Eric Shiner 204305551

E.O.R. Name, Firm and Phone Number:

Work Mix: 0236 - INTERCHANGE - ADD LANES

By transmittal of this PS&E Package, the District Director of Transportation Development (or designee) certifies that the Plans, Specifications and Estimates (PS&E) Package is complete, has no known errors or omissions, has been reviewed for constructability and bidability, and is ready to be advertised for construction.

The Authorization Estimate has posted to the server by District Estimator no later than the transmittal date for the PS&E Package.

The following documents are transmitted as noted:

**FEDERAL AID OFFICE INFORMATION**  
 If Projects of Division Interest,  
 \*Authorized by: \_\_\_\_\_ Date: \_\_\_\_\_  
 Title: \_\_\_\_\_

**CONTRACTS OFFICE INFORMATION**  
 Contract Time: 120 Calendar Days  
 Select One:  
 Standard Acquisition Time: 15  
 Other Acquisition Time: \_\_\_\_\_ Days (Approval required if more than 120 Days)  
 Flexible Start Time: \_\_\_\_\_ Days (Approval required if more than 120 Days)  
 Special Start Date: \_\_\_\_\_ (Approval required for 0218/0236 and 9200/9330)  
 Wage Rates: \$12.00  
 Business Development Initiative Project: No  
 Alternative Contracting: No  
 Pre-Bid Conference Mandatory? Yes (Date: 10/30/2020 Time: 9:00 AM)  
 Contact Person for Conference: James Driggers Jr.  
 Contact Phone Number for Conference: 9041234569  
 Location of Conference: Second Floor  
 First Building  
 789 Street A  
 Tallahassee, Florida

SPECIAL NOTES and REQUIREMENTS (if any/Explain)

### Note if information is missing/incorrect:

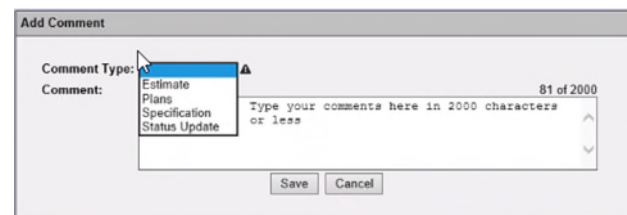
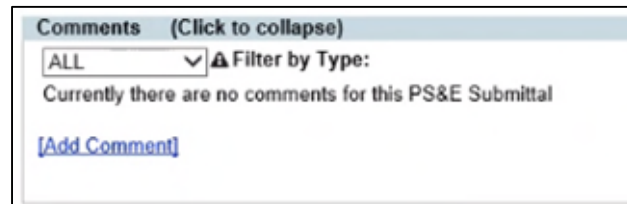
- a. AD Days: Make a request to your District's Work Program to have the group code 30DA (for a 30 day ad) or 60DA (for a 60 day ad) to be added in the FM application.
- b. EOR information: Add the EOR to the Address Module.
- c. Business Development Initiative Project (BDI): Contact your District Work Program to correct if the code is missing or displays incorrectly.
- d. Alternative Contracting: Contact your District Work Program to correct if the code is missing or appears incorrectly.

## Comments

The comments area is very beneficial as a common area where users can find information related to the specific submittal. These comments help tell a story of what occurred during the processing of the submittal. It is important to remember these comments can NOT be deleted. Please be kind, be professional and use the spell checker.

### Adding a Comment

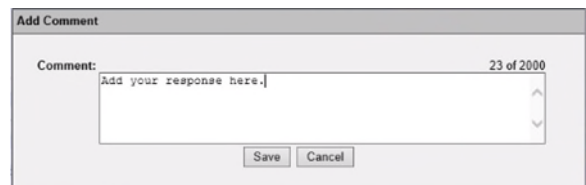
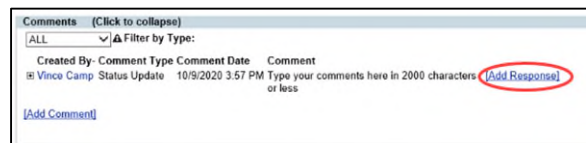
1. Expand the Comments submodule.
2. Select the [Add Comment] link.
3. In the popup modal window, select a comment type. The choices are Estimates, Plans, Specifications or Status Update.
4. Type the comment in the open text box. This space will allow up to 2,000 characters per comment.
5. Click the SAVE button.



### Adding A Response

Once a comment is added, a conversation thread can be added.

1. With the comment visible, select the [Add Response] link.
2. A popup modal will appear with only the comment text box. This space will allow up to 2,000 characters per response.
3. Click the SAVE button.

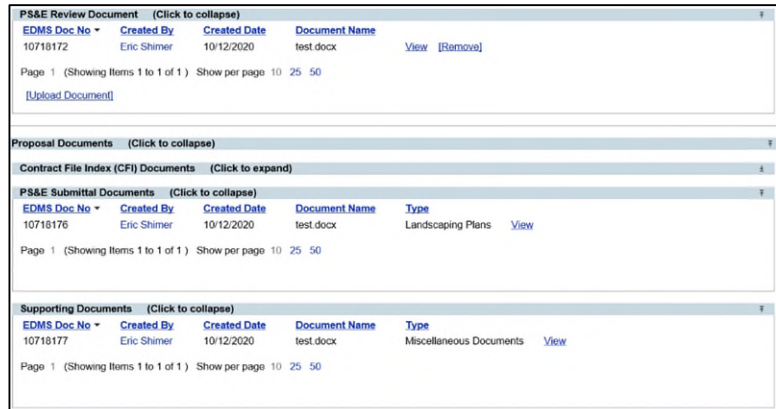


## Documents

There are four document sections within this module. There is a PS&E Review Documents submodule located within each submittal. These documents are specific to the submittal itself. In the Proposal Documents area, there are three submodules. The first one is where the Contract File Index (CFI) documents are stored in a versioning format. The second submodule is the PS&E Proposal documents which stores all the documents the Contract’s office will be needed. Lastly, is the Supporting Documents where documents related to the entire package but do not apply to the previous two submodules are stored. These would be items such as emails or district specific required documents.

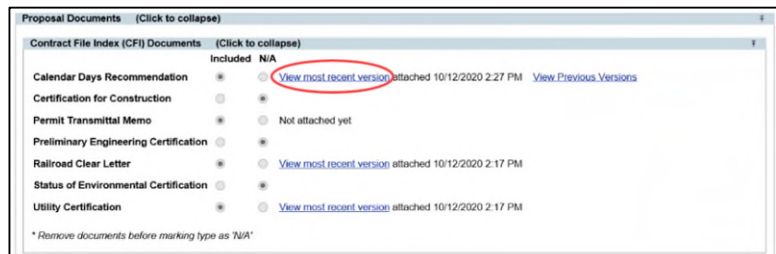
### Viewing PS&E Review Documents, PS&E Proposal Documents & Supporting Documents

1. Expand the respective submodule.
2. Select the [View] link at the end of the document row.
3. The file will open.



### Viewing CFI Documents – Current version

1. Expand the Contract File Index (CFI) Documents submodule
2. Select the [View most recent version] link to open the current document.
3. The file will open.

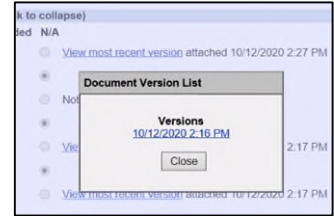


### Viewing CFI Documents – Previous Versions

1. Expand the Contract File Index (CFI) Documents submodule
2. Select the [View Previous Versions] link to open the older versions of the document.



3. A popup modal will open listing the dates/times the previous versions were uploaded.
4. Select the version by clicking on the date/time. The file will open.

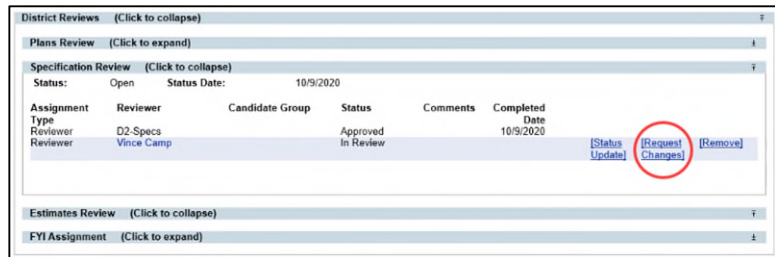


## Reviewer Actions

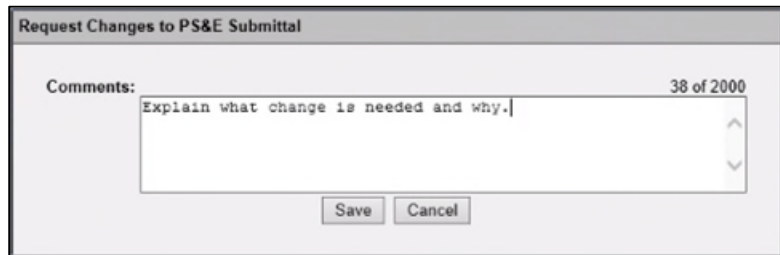
### Requesting Changes

There are times when a reviewer finds information that needs to be added or modified. The reviewer can use the Request Changes feature to return the submittal to the PM or EOR to make these changes. When this feature is used, all reviews with a status of IN REVIEW will change to PENDING. Any reviews already approved or rejected will remain in that status.

1. Expand the District Review submodule.
2. Select the [Request Changes] link next to your review assignment.



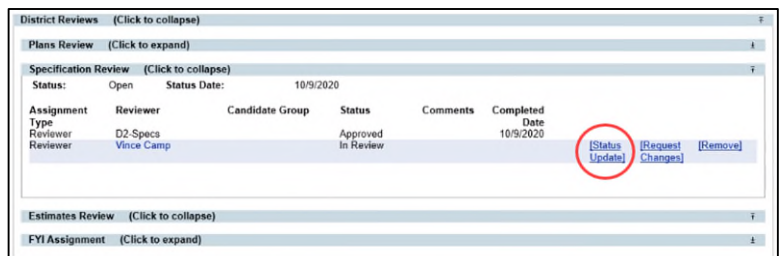
3. Enter a comment explaining what changes/modifications are needed.



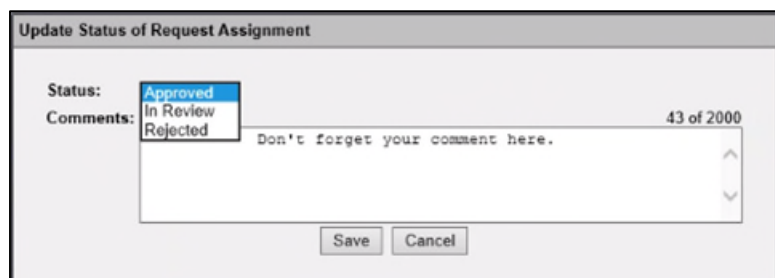
4. The request is now back in the queue for the PM and/or EOR. The PM, EOR or Requestor will use the [Edit] link to make changes and then they will [Submit] the submittal. A new email will be sent informing the reviewers of an assignment once the PM resubmits with the necessary changes.

### Status Update (In Review / Approve / Reject)

1. Expand the District Review submodule.
2. Next to your review assignment, select the [Status Update] link.



3. Choose one of the statuses from the dropdown:



- a. Choose “In Review” if your review is not complete, but you would like to leave a comment.
  - b. Choose “Approve” if the submittal is complete and ready for transmittal to CO (if CC1) or District Contracts (if CC7). Adding a comment is an option but not required.
  - c. Choose “Reject” if the submittal is incomplete and needs another round of submittal and review. Adding a comment is recommended if the status is REJECTED.
4. Select the SAVE button

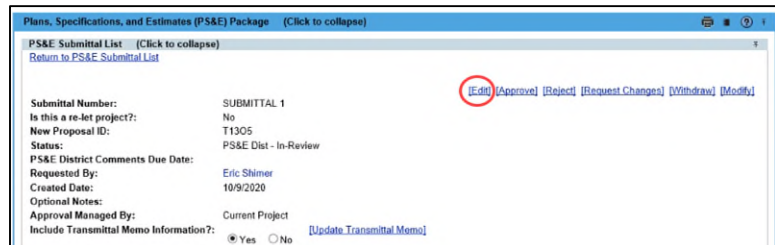
## Lead’s Actions

Every district should have a Lead Role identified. If a reviewer becomes unavailable and did not set up a delegate, the Lead can push the submittal along to the next level of reviewers. The Lead can also handle submittals when there is a difference in reviewer opinions. If the approve/reject is NOT unanimous, then the Lead will be required to make the final decision to approve or reject. Also, for districts who do not set district level reviews workflows, the Lead will perform the actions just as a reviewer would have.

## Editing Submittal Details

This option allows user(s) who have been granted the privileges as District Leads to make changes/corrections if PM, EOR or Requestor are not available, or if time constraints exists.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Edit] link.

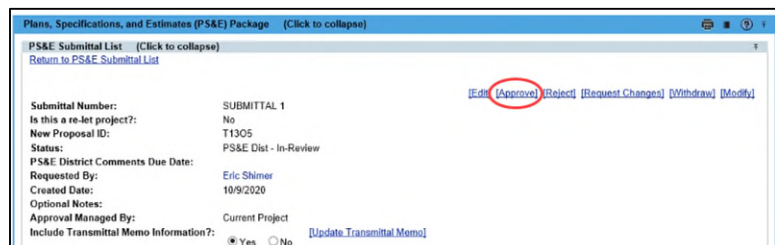


3. The entry modal will appear to allow editing of the information entered in the overview area and the CFI Information submodule.
4. After all changes are made, select the SAVE button.

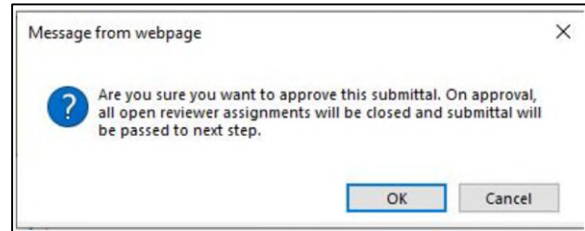
*If changes are needed under a submodule, refer to that submodule instructions under ‘Adding a Submittal’ section of this help document.*

## Approve

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Approve] link.



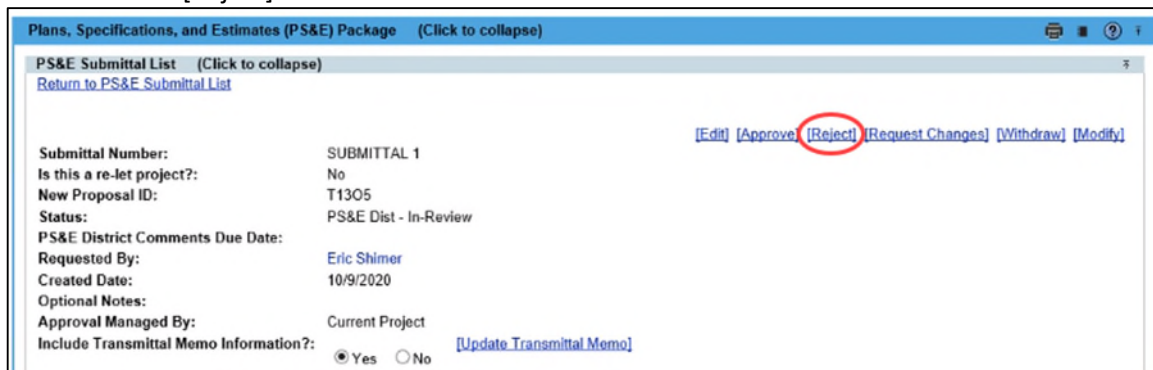
3. A confirmation box will appear for the Lead to confirm they would like to approve.
4. Select OK, if that was the intent.



The request will now progress to either CO Plans Process (if CC1 project) or District Contracts (if CC7 project) for their review.

## Reject

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Reject] link.



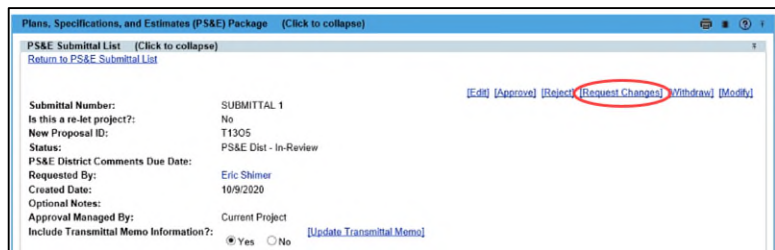
3. A confirmation box will appear for the Lead to confirm they would like to reject.
4. Select OK, if that was the intent.



## Requesting Changes

Just like the Reviewer, there are times when a Lead finds information that needs to be added or modified. The Lead can use the Request Changes feature to return the submittal to the PM or EOR to make these changes. When this feature is used, all reviews with a status of IN REVIEW will change to PENDING. Any reviews already approved or rejected will remain in that status.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Request Changes] link.





3. Enter a comment explaining what changes/modifications are needed.

4. Request is now back in the queue for the PM and/or EOR. The PM, EOR or Requestor will use the [Edit] link to make changes and then they will [Submit] the submittal. A new email will be sent informing the reviewers of an assignment once the PM resubmits with the necessary changes.

## Withdraw

If there are major changes needed but the District Lead feels it is necessary to keep the original submittal, the Withdraw action should be used. This action will change the status to Withdrawn and the submittal can not be edited or resubmitted. A new submittal will be created in a status of Draft for the PM, EOR or Requestor to begin a new submittal.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Withdraw] link.

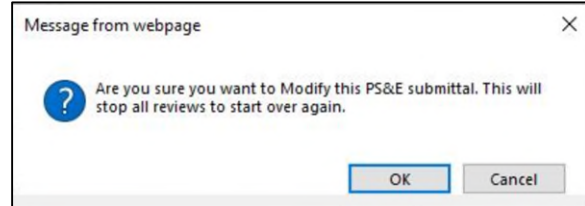
3. A confirmation box will appear for the Lead to confirm they would like to withdraw.
4. Select OK, if that was the intent.

## Modify

If the District Lead realizes there are changes/corrections needed after the SUBMIT link is selected, the Modify action will need to be used. This feature pulls the submittal back from the District PS&E Review. The reviewer's status change to Pending and the PS&E Submittal Package

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Modify] link. This will set the status back to one similar to DRAFT.

3. A confirmation box will appear for the Lead to confirm they would like to modify.
4. Select Yes, if that was the intent. The status changes to 'Under Modification'.
5. Select [Edit] link. Make changes/corrections.
6. Select the [Submit] link to place the PS&E Package Submittal back in the review cycle.



## CENTRAL OFFICE PLANS REVIEWERS

For Contract Class 1 projects, there will be a group of reviewers from the CO Plans Processing office who will review the submittal or revision before CO Contracts office. These user's roles could be Reviewer, FYI or District Lead.

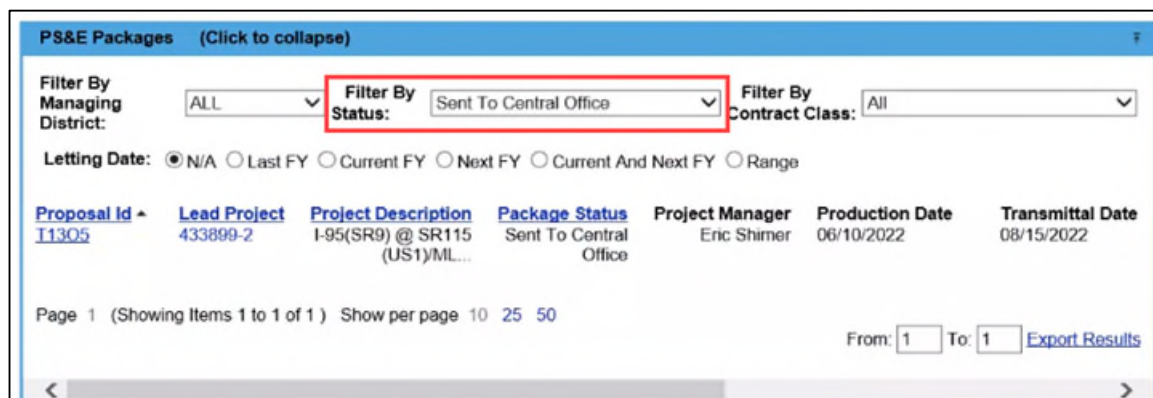
### Receiving the Submittal

Before Reviewer workflows can be set, the Central Office Lead must accept the submittal from the District PS&E Office. The user(s) who have been **granted** the Central Office Lead privilege will receive an email that a submittal is ready to be accepted. No changes to documents or submittal details can be made by the PM, EOR, Requestor, or District PS&E Office Reviewers/Lead.

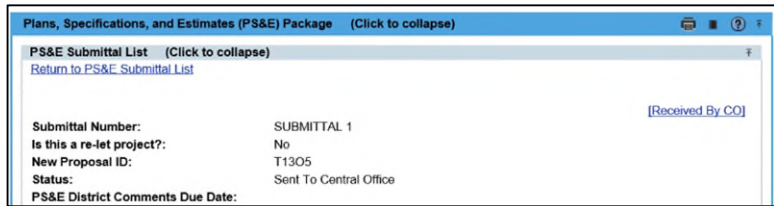
1. Open the PS&E Package Dashboard.



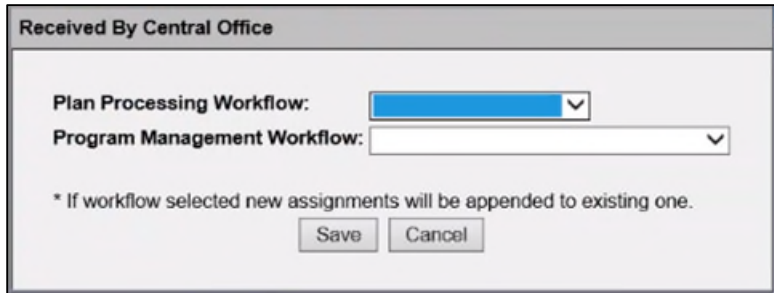
2. Change the 'Filter by Status' to **Sent to Central Office** to view the submittals awaiting acceptance.
3. Select the Proposal ID which is a hyperlink to the submittal. This will open the selected Submittal.



4. Select the [Received by CO] link.



5. A popup modal will appear to select the Plan Processing Workflow and/or Program Management Workflow.

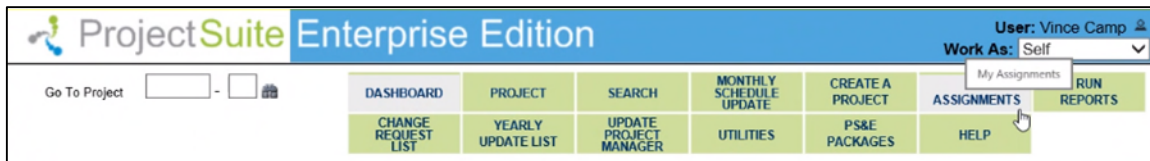


6. Click the SAVE button.

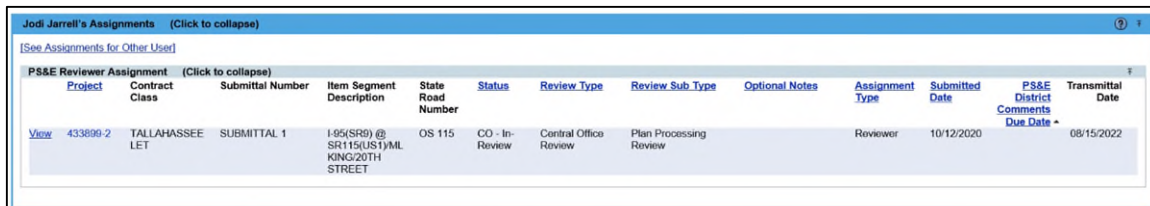
## Receiving Assignments

When a review assignment changes from PENDING to IN REVIEW, the application will automatically send the Reviewer an email to notify them that an assignment is ready. FYI assignments receive an automatic email when a PS&E submittal is submitted.

1. Select the MY ASSIGNMENT button in the global toolbar.




2. Select the VIEW link for the project. If more than one, refer to the subject line of the email.



3. The submittal to be reviewed will open within the PS&E Package Module.
4. Review the overview information.

## Transmittal Memo Details

### Edit Transmittal Memo Details

1. Expand the Transmittal Memo Details submodule.
2. Select the [Add/Update Transmittal Memo] link.
3. A modal will appear and display the current Transmittal Details. The  indicated fields that are required to save the entry. Make necessary changes.
4. Select the SAVE button.

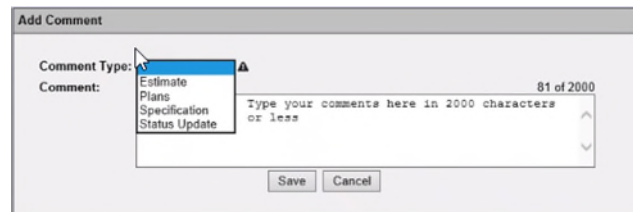
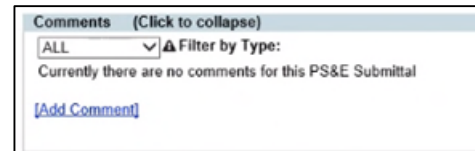


## Comments

The comments area is very beneficial as a common area where users can find information related to the specific submittal. These comments help tell a story of what occurred during the processing of the submittal. It is important to remember these comments can NOT be deleted. Please be kind, be professional and use the spell checker.

### Adding a comment

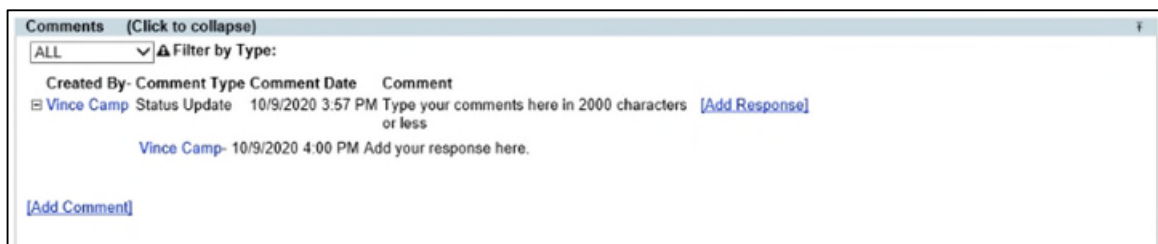
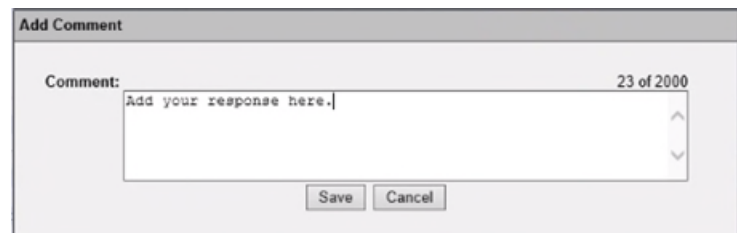
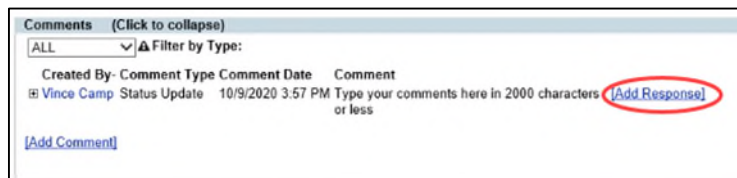
1. Expand the Comments submodule.
2. Select the [Add Comment] link.
3. In the popup modal window, select a comment type. The choices are Estimates, Plans, Specifications or Status Update.
4. Type the comment in the open text box. This space will allow up to 2,000 characters per comment.
5. Click the SAVE button.



### Adding A Response

Once a comment is added, a conversation thread can be added.

1. With the comment visible, select the [Add Response] link.
2. A popup modal will appear with only the comment text box. This space will allow up to 2,000 characters per response.
3. Click the SAVE button.



## Viewing Documents

There are 4 document sections within this module. There is a PS&E Review Documents submodule located within each submittal. These documents are specific to the submittal itself. In the Proposal Documents area, there are 3 submodules. The first one is where the Contract File Index (CFI) documents are stored in a versioning format. The second submodule is the PS&E Proposal documents which stores all the documents the Contract's office will be needed. Lastly is the Supporting Documents where documents related to the package as a whole but do not apply to the previous two submodules are stored. These would be items such as emails or district specific required documents.

### Viewing PS&E Review Documents, PS&E Proposal Documents & Supporting Documents

1. Expand the respective submodule.
2. Select the [View] link at the end of the document row.
3. The file will open.

The screenshot displays four document sections in a web interface:

- PS&E Review Document (Click to collapse)**: A table with columns: EDMS Doc No, Created By, Created Date, Document Name, View, and [Remove]. One row is shown with EDMS Doc No 10718172, Created By Eric Shimer, Created Date 10/12/2020, and Document Name test.docx. Below the table are pagination controls (Page 1, Showing Items 1 to 1 of 1, Show per page 10 25 50) and an [Upload Document] link.
- Proposal Documents (Click to collapse)**: A section header with a collapse icon.
- Contract File Index (CFI) Documents (Click to expand)**: A section header with an expand icon.
- PS&E Submittal Documents (Click to collapse)**: A table with columns: EDMS Doc No, Created By, Created Date, Document Name, Type, and View. One row is shown with EDMS Doc No 10718176, Created By Eric Shimer, Created Date 10/12/2020, Document Name test.docx, and Type Landscaping Plans. Below the table are pagination controls (Page 1, Showing Items 1 to 1 of 1, Show per page 10 25 50).
- Supporting Documents (Click to collapse)**: A table with columns: EDMS Doc No, Created By, Created Date, Document Name, Type, and View. One row is shown with EDMS Doc No 10718177, Created By Eric Shimer, Created Date 10/12/2020, Document Name test.docx, and Type Miscellaneous Documents. Below the table are pagination controls (Page 1, Showing Items 1 to 1 of 1, Show per page 10 25 50).

### Viewing CFI Documents – Current version

1. Expand the Contract File Index (CFI) Documents submodule
2. Select the [View most recent version] link to open the current document.
3. The file will open.

The screenshot shows the 'Contract File Index (CFI) Documents (Click to collapse)' submodule. It contains a table with the following data:

Document Name	Included	Version	Created Date	View
Calendar Days Recommendation	*	<a href="#">View most recent version</a>	attached 10/12/2020 2:27 PM	<a href="#">View Previous Versions</a>
Certification for Construction	○	*		
Permit Transmittal Memo	*		Not attached yet	
Preliminary Engineering Certification	○	*		
Railroad Clear Letter	*	<a href="#">View most recent version</a>	attached 10/12/2020 2:17 PM	
Status of Environmental Certification	○	*		
Utility Certification	*	<a href="#">View most recent version</a>	attached 10/12/2020 2:17 PM	

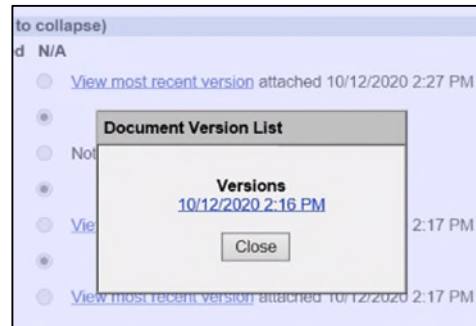
\* Remove documents before marking type as 'N/A'

## Viewing CFI Documents – Previous Versions

1. Expand the Contract File Index (CFI) Documents submodule.
2. Select the [View Previous Versions] link to open the older versions of the document.



3. A popup modal will open listing the dates/times the previous versions were uploaded.
4. Select the version by clicking on the date/time.
5. The file will open.

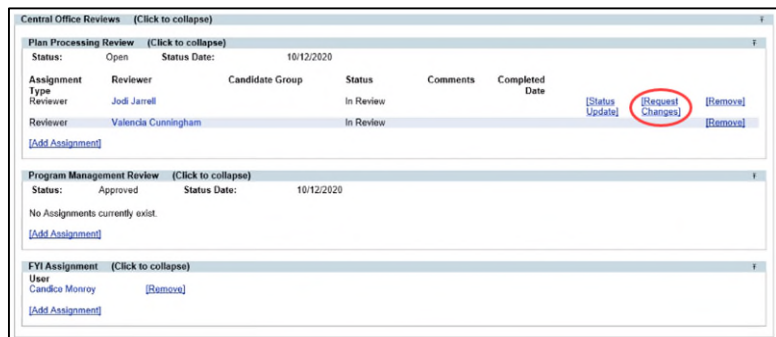


## Reviewer Actions

### Requesting Changes

There are times when a reviewer finds information that needs to be added or modified. The reviewer can use the Request Changes feature to return the submittal to the District PS&E office to make these changes. When this feature is used, all reviews with a status of IN REVIEW will change to PENDING. Any reviews already approved or rejected will remain in that status.

1. Expand the Central Office Review submodule.
2. Next to your review assignment, select the [Request Changes] link.





3. Enter a comment explaining what changes/modifications are needed.

4. Request is now back in the queue for the PS&E District Office. A new email will be sent informing the reviewers of an assignment once the submittal is resubmitted with the necessary changes.

### Status Update (In Review/Approve/Reject)

1. Expand the Central Office submodule.
2. Next to your review assignment, select the [Status Update] link.

Assignment	Reviewer	Candidate Group	Status	Comments	Completed Date
Plan Processing Review	Jodi Jarrell		In Review		
	Valencia Cunningham		In Review		

3. Choose one of the statuses from the dropdown:
  - a. In Review if your review is not complete, but you would like to leave a comment.
  - b. Approve if the submittal is complete and ready for transmittal to Central Office Contracts. Adding a comment is an option but not required.
  - c. Reject if the submittal is incomplete and needs another round of submittal and review. Adding a comment recommended if the status is REJECTED.

4. Select the SAVE button

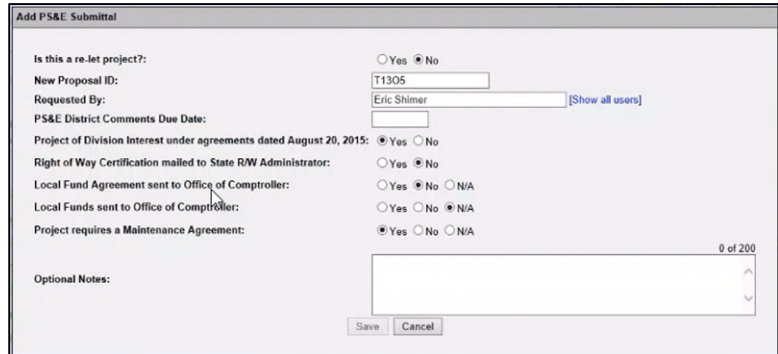
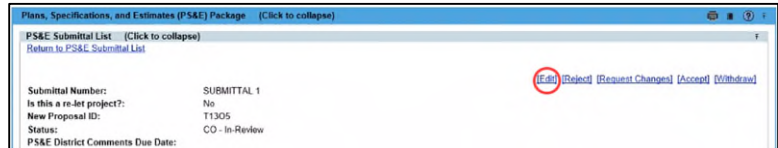
### Lead's Actions

As stated, every district should have a Lead Role identified. If a reviewer becomes unavailable and did not set up a delegate, the Lead can push the submittal along to the next level of reviewers. The Lead can also handle submittals when there is a difference in reviewer opinions. If the approve/reject is NOT unanimous, then the Lead will be required to make the final decision to approve or reject. Also, for districts who do not set district level reviews workflows, the Lead will perform the actions just as a reviewer would have.

## Editing Submittal Details

This option allows user(s) who have been granted the privileges as District Leads to make changes/corrections if PM, EOR or Requestor are not available or time constraint exists.

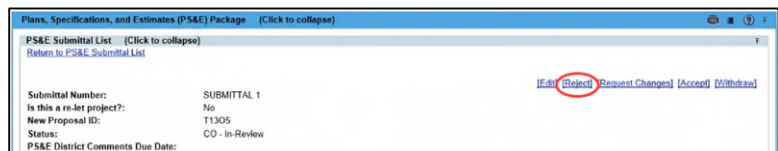
1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Edit] link.
3. The entry modal will appear to allow editing of the information entered in the overview area and the CFI Information submodule.
4. After all changes are made, select the SAVE button.



If changes are needed under a submodule, refer to that submodule instructions under 'Adding a Submittal' section of this help document.

## Reject

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Reject] link.
3. A confirmation box will appear to make sure the reject was the intent.
4. Select the OK button



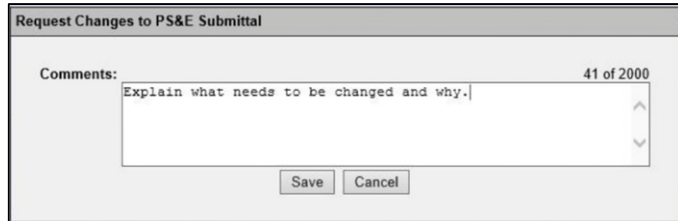
## Requesting Changes

Just like a Reviewer, there are times when a Lead finds information that needs to be added or modified. The Lead can use the Request Changes feature to return the submittal to the District PS&E Office to make these changes. When this feature is used, all reviews with a status of IN REVIEW will change to PENDING. Any reviews already approved or rejected will remain in that status.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.



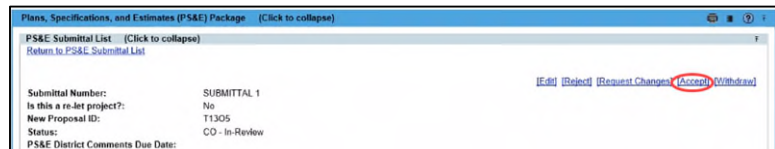
2. Select the [Request Changes] link.
3. Enter a comment explaining what changes/modifications are needed.



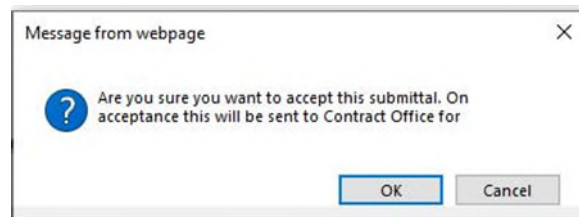
4. Request is now back in the queue for the District PS&E Office. A new email will be sent informing the reviewers of an assignment once the PM resubmits with the necessary changes. The District Lead will have the submittal appear in their MY ASSIGNMENT.

### Accept

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.



2. Select the [Accept] link.
3. A confirmation box will appear to make sure the accept was the intent.
4. Select the OK button



The request will now progress to Central Office Contracts for their review.

### Withdraw

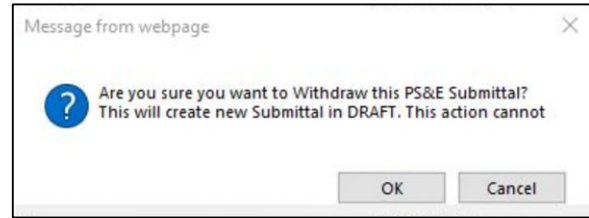
If there are major changes needed but the CO Plans Processing Lead feels it is necessary to keep the original submittal, the Withdraw action should be used. This action will change the status to Withdrawn and the submittal cannot be edited or resubmitted. A new submittal will be created in a status of Draft for the PM, EOR or Requestor to begin a new submittal.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.



2. Select the [Withdraw] link.

3. A confirmation box will appear for the Lead to confirm they would like to withdraw.
4. Select Ok, if that was the intent.



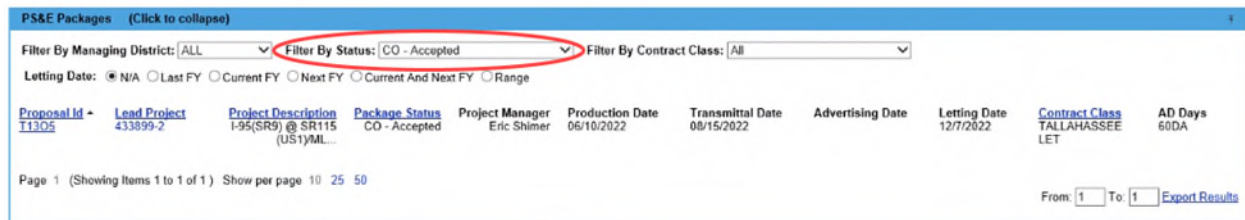
## CONTRACTS OFFICE – CENTRAL OFFICE / DISTRICT

When a submittal reaches the Contracts Office, there is not a formal review. Instead a user who has been **granted** the privilege ‘CO Contracts Office’ or ‘District Contracts Office’ will have the ability to ‘receive’ the PS&E Submittal Package.

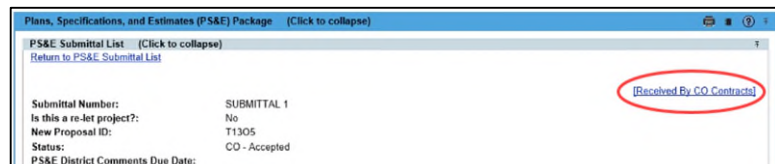
### Receiving Submittal

This is the first step for the Contracts Office. By selecting the “Received by Contracts” option, the Contracts Office is taking control of the PS&E Package. No changes to documents or submittal details can be made by the PM, EOR, Requestor, District PS&E Office Reviewers/Lead, or Central Office Plans Processing (if CC 1).

1. Open the PS&E Package Dashboard.
2. Change the ‘Filter by Status’ to:
  - a. **‘CO-Accepted’** and **‘CO-Approved’** to view the submittals awaiting receipt by CO Contracts office
  - b. **‘Sent to District Contracts’** to view the submittals awaiting receipt by District Contracts office.



3. Select the Proposal ID which is a hyperlink to the submittal. This will open the selected Submittal.
4. Select the [Received by CO/District Contracts] link.
5. The status changes to **‘Received by CO/District Contracts’**, respectively.



## Generate the Transmittal Memo Form

1. Expand the Transmittal Memo Details submodule.
2. Select the [Generate Transmittal Memo Form] link.
3. The form will open in a new tab.

4. While viewing the form onscreen, print option allows the choice of Excel, Word or PDF.
5. Close the tab when finished viewing and/or printing.

### Notes if information is missing:

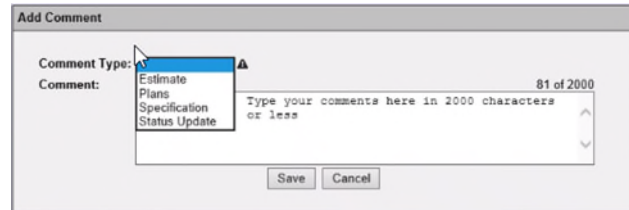
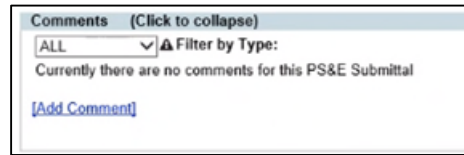
- a. AD Days: Make a request to your district's Work Program to have the group code 30DA (for a 30 day ad) or 60DA (for a 60 day ad) to be added in the FM application.
- b. EOR information: Add the EOR to the Address Module.

## Comments

The comments area is very beneficial as a common area where users can find information related to the specific submittal. These comments help tell a story of what occurred during the processing of the submittal. It is important to remember these comments can NOT be deleted. Please be kind, be professional and use the spell checker.

## Adding a comment

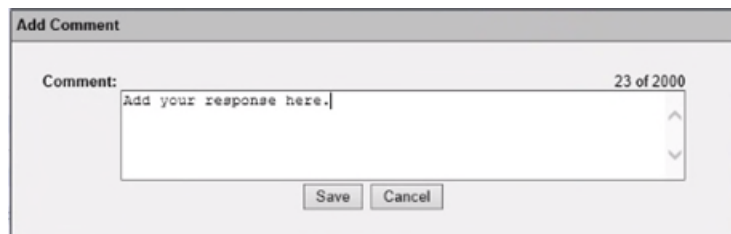
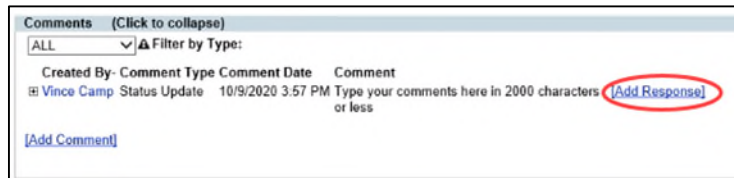
1. Expand the Comments submodule.
2. Select the [Add Comment] link.
3. In the popup modal window, select a comment type. The choices are Estimates, Plans, Specifications or Status Update.
4. Type the comment in the open text box. This space will allow up to 2,000 characters per comment.
5. Click the SAVE button.



## Adding A Response

Once a comment is added, a conversation thread can be added.

1. With the comment visible, select the [Add Response] link.
2. A popup modal will appear with only the comment text box. This space will allow up to 2,000 characters per response.
3. Click the SAVE button.



## Viewing Documents

There are four document sections within this module. There is a PS&E Review Documents submodule located within each submittal. These documents are specific to the submittal itself. In the Proposal Documents area, there are three submodules. The first one is where the Contract File Index (CFI) documents are stored in a versioning format. The second submodule is the PS&E Proposal documents which stores all the documents the Contract's office will need. Lastly is the Supporting Documents where documents related to the entire package, but do not apply to the previous two submodules, are stored. These would be items such as emails or district specific required documents.

### Viewing PS&E Review Documents, PS&E Proposal Documents & Supporting Documents

1. Expand the respective submodule.
2. Select the [View] link at the end of the document row.
3. The file will open.

**PS&E Review Document** (Click to collapse)

EDMS Doc No	Created By	Created Date	Document Name	
10718172	Eric Shimer	10/12/2020	test.docx	<a href="#">View</a> <a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50  
[\[Upload Document\]](#)

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**Proposal Documents** (Click to collapse)

**Contract File Index (CFI) Documents** (Click to expand)

**PS&E Submittal Documents** (Click to collapse)

EDMS Doc No	Created By	Created Date	Document Name	Type	
10718176	Eric Shimer	10/12/2020	test.docx	Landscaping Plans	<a href="#">View</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

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**Supporting Documents** (Click to collapse)

EDMS Doc No	Created By	Created Date	Document Name	Type	
10718177	Eric Shimer	10/12/2020	test.docx	Miscellaneous Documents	<a href="#">View</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

### Viewing CFI Documents – Current version

1. Expand the Contract File Index (CFI) Documents submodule
2. Select the [View most recent version] link to open the current document.
3. The file will open.

**Contract File Index (CFI) Documents** (Click to collapse)

	Included	N/A	
Calendar Days Recommendation	*	<a href="#">View most recent version</a>	attached 10/12/2020 2:27 PM <a href="#">View Previous Versions</a>
Certification for Construction		*	
Permit Transmittal Memo	*		Not attached yet
Preliminary Engineering Certification		*	
Railroad Clear Letter	*	<a href="#">View most recent version</a>	attached 10/12/2020 2:17 PM
Status of Environmental Certification		*	
Utility Certification	*	<a href="#">View most recent version</a>	attached 10/12/2020 2:17 PM

\* Remove documents before marking type as 'N/A'

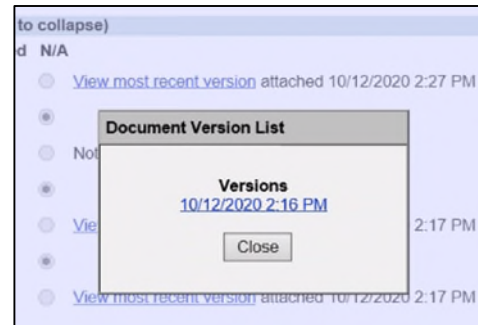


## Viewing CFI Documents – Previous Versions

1. Expand the Contract File Index (CFI) Documents submodule
2. Select the [View Previous Versions] link to open the older versions of the document.



3. A popup modal will open listing the dates/times the previous versions were uploaded.
4. Select the version by clicking on the date/time.
5. The file will open.

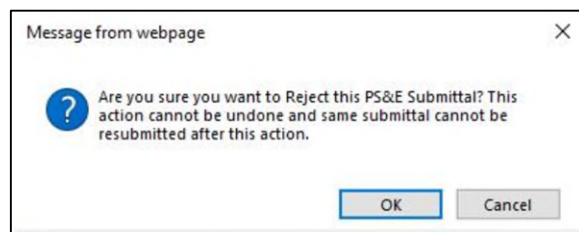
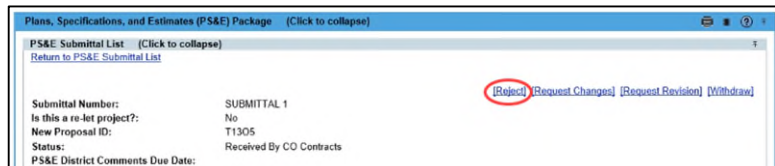


## Contracts Office Actions

If it is necessary for the contracts office to Reject a submittal. Not that this action can not be redone. It will require a new submittal to be created and rerouted through the review process.

### Reject

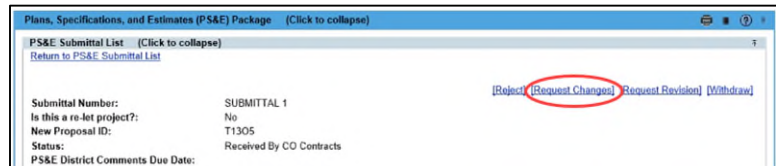
1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Reject] link.
3. A confirmation message will appear to ensure reject was the intent.
4. Select the OK button.



## Requesting Changes

Just like a Reviewer or Lead, the Contracts privileged user may find information that needs to be added or modified. The Request Changes feature can be used to return the submittal to the CO Plans Processing (if CC1) or District PS&E Staff (if CC7) to make these changes. When this feature is used, all reviews with a status of IN REVIEW will change to PENDING. Any reviews already approved or rejected will remain in that status.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Request Changes] link.



3. Enter a comment explaining what changes/modifications are needed.

 A dialog box titled "Request Changes to PS&E Submittal". It contains a text area for "Comments:" with a character count of "41 of 2000". The text area contains the text "Explain what needs to be changed and why.". At the bottom of the dialog, there are "Save" and "Cancel" buttons.

4. Request is now back in the queue for previous review level. A new email will be sent informing the reviewers of an assignment once the PM resubmits with the necessary changes.

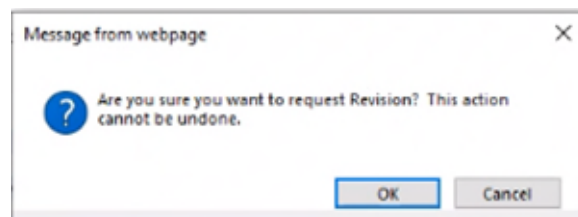
## Requesting Revisions

If the Contracts Office finds a need, this action allows them to request a revision to be prepared. By selecting this option, the status of the submittal changes to 'Revision Requested'.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.
2. Select the [Request Revision] link.



3. A confirmation box will appear to confirm the user would like to request a revision.
4. Select OK, if that was the intent.



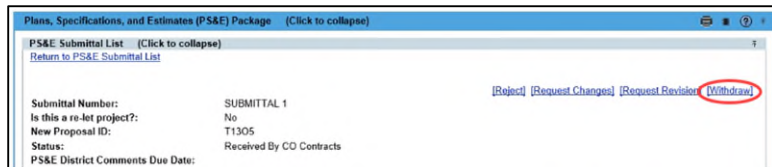
5. An email will be sent to the PM and the District. Another email will be sent informing the reviewers of an assignment once the PM resubmits with the necessary changes.

## Withdraw

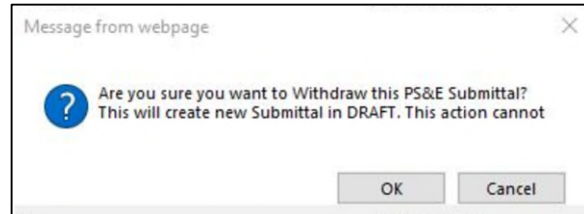
If there are major changes needed but the Contracts Office feels it is necessary to keep the original submittal, the Withdraw action should be used. This action will change the status to Withdrawn and the

submittal cannot be edited or resubmitted. A new submittal will be created in a status of Draft for the PM, EOR or Requestor to begin a new submittal.

1. Scroll to the top of the PS&E Submittal List submodule. The links are in the top right corner.



2. Select the [Withdraw] link.
3. A confirmation box will appear to confirm the user would like to withdraw.
4. Select OK, if that was the intent.



## User Profile Settings

The following areas will be accessed and set up under the user profile area. Click the user profile icon next to the user's name.



## Request Privileges

The ability to perform actions in the PS&E Module relies on the appropriate privileges being granted. From the dropdown, select the PS&E Package. Then click Request Privileges. Place checkmark for the privilege needed under the appropriate district. An email will be sent to the corresponding District Admins to review and grant permissions. If necessary, the District Admin may contact the user for additional information prior to granting the privilege.

The screenshot shows a 'Request Privileges' dialog box overlaid on a main application window. The main window has a dropdown menu set to 'PS&E Package' and a 'Request Privileges' link. The dialog box contains a table with the following structure:

Privileges	D1	D2	D3	D4	D5	D6	D7	TP	CO
Manage PS&E Package									
Can View Submittals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
District Contracts Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CO Contracts Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS&E Central Office Lead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS&E District Lead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Central Office Review Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage District Review Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove PS&E Submittal	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage PS&E Submittal	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the dialog, there are 'Request' and 'Cancel' buttons.

## Notifications

From the Privilege and Notification module, users can select the type of emails they would like to receive. This is part 1 of the 2-step process for email notifications.

PS&E Package	Privileges								Receive Notific	
	D1	D2	D3	D4	D5	D6	D7	TP		CO
Receive by District Contract	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Select All
Receive By Central Office Contracts	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Can View Submittals	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Can see Submittal Details	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Request Revision By Contracts	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage PS&E Revision	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
District Contracts Office	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
CO Contracts Office	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Accept PS&E Submittal By CO	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Request Changes to PS&E Submittal By CO	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Request Changes to PS&E Submittal By District	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove FYI Assignments	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove Reviewer Assignments	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Add PS&E Submittal Comment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Can View Exempt Document	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage PS&E Review Documents	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Received By Central Office	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
PS&E Central Office Lead	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Modify PS&E Submittal	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Withdraw PS&E Submittal	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Reject PS&E Submittal	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Send To District Contract	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Send To Central Office	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Approve PS&E Submittal	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
PS&E District Lead	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Edit PS&E Submittal	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Submit PS&E Submittal	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Approve Reject Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Self Assign Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Differ Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Edit Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove Central Office Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove District Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage Central Office Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage District Review Assignment	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove PS&E Submittal	--	--	✓	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage Bid Doc (Public Exempt)	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage CFI Doc	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage Additional Document	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage Bid Doc	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage PS&E Workflow	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Deactivate PS&E Document	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Activate PS&E Document	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Manage PS&E Submittal	--	--	✓	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove CFI Doc	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove Bid Document	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example
Remove Additional Document	--	--	--	--	--	--	--	--	--	<input type="checkbox"/> Example

\*These privileges are determined by business rules and not directly assigned.

## Subscriptions

In part 1, the user chose what actions they want to know about. Part 2 is to identify which projects the user want to know about. There are 4 options.



## Four Options

### Option 1: By District

This means the emails would apply to ALL projects in the user's district. This is NOT suggested without talking to a District Admin or a Functional Application Coordinator. This subscription can result in a large amount of unnecessary emails. This selection applies to a few users in each district.

**Notification Subscriptions** (Click to collapse)

**Subscriptions By District** (Click to collapse)

- Central Office
- District 1
- District 2
- District 3
- District 4
- District 5
- District 6
- District 7
- Turnpike

Save Cancel

**Subscriptions By PSEE Project Manager** (Click to expand)

**Subscriptions By Project** (Click to expand)

### Option 2: By PSEE Project Manager

This means the emails would apply to ALL projects assigned to selected PSEE Project Managers in the user's district. This selection is often used if the subscriber is a Manager or if work in the district is distributed based on assigned Project Managers.

**Notification Subscriptions** (Click to collapse)

**Subscriptions By District** (Click to expand)

**Subscriptions By PSEE Project Manager** (Click to collapse)

Select Project Manager:  [Show all users](#)

**PSEE Project Manager**

Alaina Webb [Remove](#)

**Subscriptions By Project** (Click to expand)

### Option 3: By Project in User Profile

This means the emails would apply to ALL projects selected by the user. This is not restricted to a specific district. This is the most commonly used option.

1. Click the "Show Project Subscription Selection" link.

**Notification Subscriptions** (Click to collapse)

**Subscriptions By District** (Click to expand)

**Subscriptions By PSEE Project Manager** (Click to expand)

**Subscriptions By Project** (Click to collapse)

Project	County	Version	Description	Bridges	Work Mix	WP Project Manager	PSEE Project Manager
219344-2	JACKSON	AD	SR 10 (US 90) CHIPOLA RIVER BRIDGE BRIDGE NO. 530005		0024 - BRIDGE-REPAIR/REHABILITATION	BILL HOWELL	William Howell <a href="#">Remove</a>
222802-2	WALTON	AD	SR 8 (I-10) UNDER CR 280 BOB SIKES ROAD BRIDGE NO. 600004		0925 - BRIDGE - PAINTING	JON MCCLAIN	Jon McClain <a href="#">Remove</a>

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[Remove All Project Subscriptions](#) [Show Project Subscription Selection](#)

2. The system displays the 'ADD PROJECT SUBSCRIPTION' modal. This is the same criteria used in the Project Search of ProjectSuite. User inputs project attributes based on the type of projects they want to subscribe to.

For this example, the user is looking for projects in Bay County, that are Contract Class 1 and have SR 20 in the Description.

The screenshot shows the 'Add Project Subscription' modal with the following details:

- Project Section:**
  - Project: (Click to collapse)
  - Active Status: All
  - Item Segment Group: All
  - Transportation System: All
  - Projects With No PSEE PM:
  - Projects With PSEE PM:
  - Without Permits:
  - PSEE Project Manager (Primary/Backup):  Clear
  - WP Project Manager:  Contains Starts With Exact
  - Description / Item Seg. Comments: SR 20 Contains Starts With Exact
  - Contract Number:  Contains Starts With Exact
  - Local Agency: All
  - Fund Code: All
  - Phase Grouping: All
  - Fiscal Year: From  To  (YYYY)
- Location Section:**
  - Location: (Click to collapse)
  - District: District 3
  - County: BAY
  - Roadway ID:  Contains Starts With Exact
  - MilePost: (only when Roadway ID entered) From  To
  - Bridge ID:
- Schedule Section:**
  - Schedule: (Click to collapse)
  - Plans to Tallahassee:  NIA  Current FY  Next FY  Current And Next FY  Range
  - Letting Date:  NIA  Current FY  Next FY  Current And Next FY  Range
  - Production Date:  NIA  Current FY  Next FY  Current And Next FY  Range
  - Construction Finish Date:  NIA  Current FY  Next FY  Current And Next FY  Range
  - Float: From  To
- Table:**

Status:	Contract Class:	Work Mix:
All	All	All
00000000 - Candidate Line Item	1 - TALLAHASSEE LET	0002 - NEW ROAD CONSTRUCTION
00000003 - Dropped/Transferred	2 - EXTERN MINGO(NOT LAP)	0004 - HWY RECONSTRUCTION
00000005 - Adopted, Not Begun	3 - STUDIES	0005 - FLEXIBLE PAVEMENT RECONSTRUCT.
00000010 - Pre-Const Underway	4 - MISC - NO LETTING	0006 - HWY CAPACITY/EFTY IMPROVEMENT
00000014 - Row Acquisition Beg	5 - LOCAL AGCY PGM (LAP)	0008 - ACCESS IMPROVEMENT
		0009 - ACCESS IMPROVEMENT

3. The results appear.

- If the list contains too many/not enough results, there is a 'MODIFY SEARCH' option in the top left corner.
- If the list is exactly or very close, there is an option to 'SUBSCRIBE TO ALL PROJECTS ON THIS PAGE' also in the top left corner. This only applies to the page that is visible. This example has 2 pages of results, so the 'SUBSCRIBE TO ALL PROJECTS ON THIS PAGE' option would need to be selected on each page.
- There is the option to 'SUBSCRIBE' to an individual project. However when a user selects subscribe here, the individual project is chosen. If an additional project in the list was also to be subscribed to, the user will need to reenter the selection criteria.
- There is an option to 'EXPORT RESULTS'. This will create an Excel spreadsheet of all projects matching the criteria entered. The Project numbers in the spreadsheet are active hyperlinks which will open a new browser tab to the selected project.



*Option 4: By Project at the Project Level*

The other way to subscribe to a project is at the project level.

1. Enter the project number in the “Go To Project” or click a project from the exported Excel spreadsheet.
2. Click on the ‘MY PROJECTS’ menu and pin it open.
3. The current project opened will be the first project listed. Click the grayed-out check under the notification column. Notification will be received for any project with a green checkmark under the notification column. The bookmark column is just a way to quickly identify which projects are important. It is recommended to check this column when the notification column is selected.





## Remove a Project Subscription

Removing a subscription can be done at the Project Level by unchecking the green check in the Notification column.



Also, the removal can be done under the User Profile Subscription module. Click the [Remove] link with the project to be removed.

Notification Subscriptions (Click to collapse)								
Subscriptions By District (Click to expand)								
Subscriptions By PSEE Project Manager (Click to expand)								
Subscriptions By Project (Click to collapse)								
Project	County	Version	Description	Bridges	Work Mix	WP Project Manager	PSEE Project Manager	
219344-2	JACKSON	AD	SR 10 (US 90) CHIPOLA RIVER BRIDGE BRIDGE NO. 530005		0024 - BRIDGE-REPAIR/REHABILITATION	BILL HOWELL	William Howell	[Remove]
220769-1	WASHINGTON	AD	SR 79 HOLMES CREEK BRIDGE BRIDGE NO. 610008		0925 - BRIDGE - PAINTING	J.LOCKE		[Remove]
222530-3	GADSDEN	AD	SR 8 (I-10) FROM W OF SR 10 (US 90) TO OCHLOCKONEE RIVER BR.		9999 - PD&E/EMO STUDY	IRIS WATERS	Colby Cleveland	[Remove]
222802-2	WALTON	AD	SR 8 (I-10) UNDER CR 280 BOB SIKES ROAD BRIDGE NO. 600004		0925 - BRIDGE - PAINTING	JON MCCLAIN	Jon McClain	[Remove]
433776-1	DUVAL	AD	I-95(SR9) FROM S OF I-295 INTERCHANGE TO OWENS RD		0774 - SIGNING/PAVEMENT MARKINGS	JA/TF/JF		[Remove]
437792-1	MIAMI-DADE	AD	SR 90/SW 7 ST FROM E OF SR9/SW 27AVE TO SR5/BRICKELL AVE		9956 - PEDESTRIAN SAFETY IMPROVEMENT	FUNTANELLAS, IVETTE	Ivette Funtanellas	[Remove]
437916-2	MIAMI-DADE	AD	SR 934/NORMANDY DRIVE AND RUE VENDOME		9956 - PEDESTRIAN SAFETY IMPROVEMENT	FUNTANELLAS, IVETTE	Ivette Funtanellas	[Remove]
439592-1	HOLMES	AD	SR 2 OVER WRIGHTS CREEK BRIDGE NO. 520085		0024 - BRIDGE-REPAIR/REHABILITATION	JESSICA GOLEMA	Jessica Golema	[Remove]

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[\[Remove All Project Subscriptions\]](#) [\[Show Project Subscription Selection\]](#)

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