

The Resolution Tracking Module

Contents

Requesting Privileges in the Resolution Tracking Module.....	2
The Resolution Tracking Module	2
View/List contracts in RTM	3
Viewing Issue details.....	4
View CIM details	5
Managing RTM Issues/RFI (Add, Update, Remove, Reconcile)	6
Adding RTM Issue/RFI	7
Updating E&O Issue	10
Managing Recovery Information	12
Editing or Removing Recovery Information.....	14
Managing Internal Contacts.....	14
Editing or Removing Internal Contacts	16
Managing External Contacts	18
Editing or Removing External Contacts.....	19
PSEE RTM Documents.....	21
Removing RFI's and E&O Issues	23
Reconciling an RFI.	23

Requesting Privileges in the Resolution Tracking Module

As a PSEE User, you may request access/privilege to the Resolution Tracking Module through PSEE. This request will be sent to the District Administrators. (The District Administrators are listed in the footer of every PSEE page.) For information on how to request access to specific activities within a Module, see [User Profile – Privileges and Notifications](#).

Below are the activities that can be granted privilege in the Resolution Tracking module. Place a check in the box beside the activity access/privilege being requested in the column appropriate for your District. Select the Request button to send the request to the District Administrator for action.

Request Privileges		D1	D2	D3	D4	D5	D6	D7	TP	CO
Manage RTM										
Manage Issue	<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"/>	<input type="checkbox"/>
Manage Issue - Admin	<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"/>	<input type="checkbox"/>
<input type="button" value="Request"/> <input type="button" value="Cancel"/>										

Note: When access/privilege is granted, it is for all projects within that District. When assigned as the **PSEE Project Manager**, you automatically receive access to certain privileges for your projects only.

RTM Manage Issue

This privilege lets the user Add, Remove, Edit or Reconcile any RFI and E&O issue. Users with 'Manage Issue' privilege are also able to Remove or Resolve an RFI from RTM.

RTM Manage Issue- Admin

This privilege allows assigned users change the status of an issue from 'Resolved' to 'In Review'. Once Resolved, issues can only be edited or reopened by 'RTM Manage Issue- Admin. Users with 'Manage Issue- Admin' privilege can also remove an issue that has been manually created by the user.

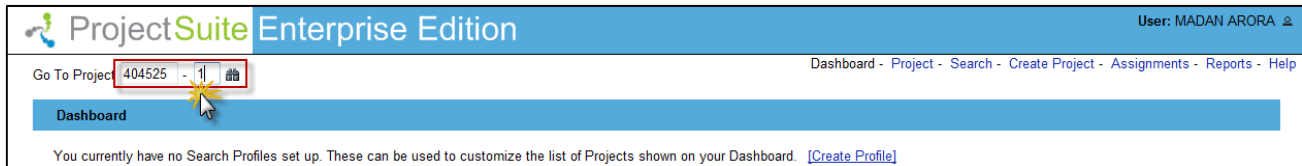
The Resolution Tracking Module

The main purpose of PSEE-RTM is to replace the existing Lotus Notes Resolution Tracking System (RTS) with a module developed within The ProjectSuite Enterprise Edition (PSEE) application. This module is for tracking resolution of Errors and Omissions (E&O) by Design consultants and Construction Engineering and Inspection (CEI) consultants which resulted in premium construction cost. The module allows the users to documents key coordination dates, documents the method of resolution and identifies any recovered cost.

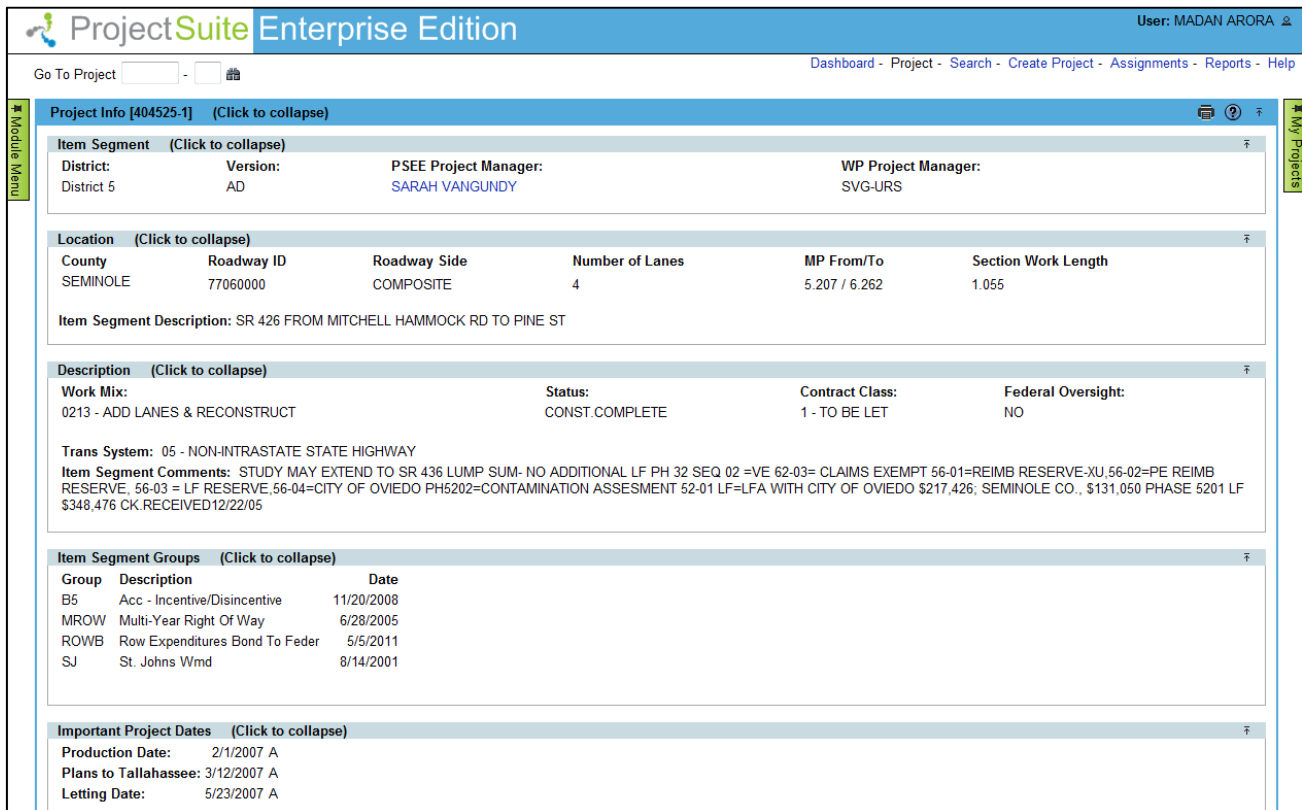
RTS is the current system being used to track E&O project issues by professional consulting engineers under contract with the Department for Design Services. It assists with the documentation and tracking of consultant responsibility for E&O project issues, identified in a Supplemental agreement, Change Order or a Line Item Adjustment against Initial Contingency Pay Item.

View/List contracts in RTM

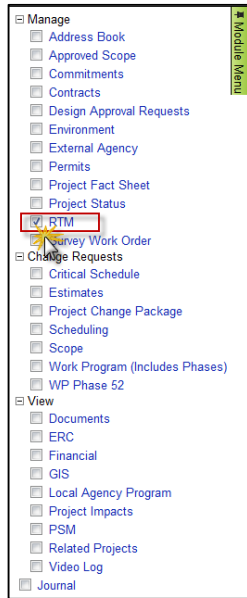
To view issues related to a contract, the RTM user shall search for a project within PSEE through the dashboard screen or a project search.



Once the search is complete, the user will see all the information related to that project



Select RTM from green pin board/navigation bar to view all the construction contracts for the project which have issues related to them.



The screen shows all the issues/RFI's in RTM. The user can filter through the contracts to view issues/RFI's related to a specific contract.

RTM (Click to collapse)										
Filter list by Construction Contract: All Contracts										
Type	Seq	Status	Avoidable Code	Consultant Contract	Premium Cost	Negotiated Recovery Amount	Total Amount Recovered	Comment		
Contract: T4255										
Change Order: 014 View in CIM										
View	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 8,483.99		\$ 10,000.00		
View	SA	2	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 0.00			Issue discovered on site ...	Remove
Change Order: 024 View in CIM										
View	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 24,365.75	\$ 12,300.00	\$ 11,000.00	This is a new issue	
Line Item: 0007 View in CIM										
View	CONN	4	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 5,443.89				
View	CONF	1	New	1-Avoidable-Prod Consultant	C8F27	\$ 11,236.62	\$ 11,000.00			
Request for Information Issues/Potential E&O Issue										
View			In Review	1-Avoidable-Prod Consultant	C8F27					Remove Reconcile

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50
[Add RFI/Issue](#)

Viewing Issue details

RFI's or E&O issue details can be viewed by clicking on **View**. These details can be managed by users who have *RTM- Manage Issue* and *Manage Issue- Admin* privileges.

RTM (Click to collapse)									
Filter list by Construction Contract: All Contracts									
Type	Seq	Status	Avoidable Code	Consultant Contract	Premium Cost	Negotiated Recovery Amount	Total Amount Recovered	Comment	
Contract: T4255									
Change Order: 014 View in CIM									
View	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 8,483.99		\$ 10,000.00	
View	SA	2	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 0.00			Issue discovered on site ... [Remove]
Change Order: 024 View in CIM									
View	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 24,365.75	\$ 12,300.00	\$ 11,000.00	This is a new issue
Line Item: 0007 View in CIM									
View	CONN	4	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 5,443.89			
View	CONF	1	New	1-Avoidable-Prod Consultant	C8F27	\$ 11,236.62	\$ 11,000.00		
Request for Information Issues/Potential E&O Issue									
View			In Review	1-Avoidable-Prod Consultant	C8F27				[Remove] [Reconcile]

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50

[\[Add RFI/Issue\]](#)

The issue detail decomposes the issue further with all the related information a user would require to resolve an issue.

RTM (Click to collapse)			
Return to Issue List			
[Edit]			
Construction Contract:	T4255	Status:	New
Estimate Number:	0007	Avoidable Code:	1-Avoidable-Prod Consultant
Line Item Adjustment Type:	CONF	Premium Cost:	\$ 11,236.62
Discovery Date:	1/1/1999	Negotiated Recovery Amount:	\$ 11,000.00
Date Responsible Party Notified:	6/4/2012	Date Issue Resolved:	
Consultant Contract:	C8F27	Vendor FEID #:	F941598707002
Responsible Party Name:	T.Y. LIN INTERNATIONAL	Responsible Party Address:	201 ALHAMBRA CIRCLE SUITE 900 CORAL GABLES , FL 33134
Comment:			
Recovery Information (Click to collapse)			
There are currently no Recovery Information items to display			
[Add Recovery Information]			
Internal Contacts (Click to collapse)			
Currently there are no Internal Contacts set for this Issue			
[Add Internal Contact]			
External Contacts (Click to collapse)			
Currently there are no External Contacts set for this Issue			
[Add External Contact]			
PSEE Issue Documents (Click to collapse)			
EDMS Doc No	Created Date	Document Name	Description Type
1682045	6/28/2012	Test.txt	Test Document GENERAL View [Edit] [Remove]
Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50			
[Upload Document]			

View CIM details

Additional details about a Change Order or a Line Item Adjustment within a contract can be viewed by clicking on **View in CIM**. This link directs the user to the 'Contract Information and Monitoring system'.

RTM (Click to collapse)

Filter list by Construction Contract All Contracts

Type	Seq	Status	Avoidable Code	Consultant Contract	Premium Cost	Negotiated Recovery Amount	Total Amount Recovered	Comment
Contract: T4255								
Change Order: 014								
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 8,483.99	\$ 10,000.00	View in CIM
[View]	SA	2	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 0.00		Issue discovered on site ... [Remove]
Change Order: 024								
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 24,365.75	\$ 12,300.00	\$ 11,000.00 This is a new issue View in CIM
Line Item: 0007								
[View]	CONN	4	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 5,443.89		View in CIM
[View]	CONF	1	New	1-Avoidable-Prod Consultant	C8F27	\$ 11,236.62	\$ 11,000.00	
Request for Information Issues/Potential E&O Issue								
[View]			In Review	1-Avoidable-Prod Consultant	C8F27			[Remove] [Reconcile]

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50

[\[Add RFI/Issue\]](#)

Help		Contract Information & Monitoring									
Application Level	Contract #	T4255	Roadway Section	06000120	SiteManager Contract Type	CC Const Contract					
Field Level	Const. Status	3 - Work Begun	Spec. Year	2010	Flair Contract Type	CRS CONTRACTS					
VAF User Guide	Cost Center	412	County	BROWARD	Contract Location	ELLER DRINCT ICTY OVERPASS					
CPRR Guidelines	Lead Finproj	403984-1-52-01	District	04 FOURTH							
CPRR User Guide											
Search	Select a Change Order View CCTS Detail (3)										
Select Criteria	CO #	CO Type	Reason	CO Amt.	Days Added	CCTS Rec.	Status	Approved Date	CCTS Contract Change Tracking System		
View Results	001	SPEC	SPMO	\$ 0.00	-	-	APPR	06-09-2011	Seq	Amount	
Construction	002	SPEC	SPMO	\$ 0.00	-	-	APPR	08-10-2011	1	\$ 16,254.94	
Contract Status	003	SPEC	SPMO	\$ 0.00	-	-	APPR	08-10-2011	2	\$ 60,853.79	
Associated Finproj	004	SPEC	SPMO	\$ 0.00	-	-	APPR	08-10-2011	3	\$ 99,228.61	
Dates	005	SPEC	SPMO	\$ 0.00	-	-	APPR	06-10-2011	CCTS Detail Item		
Cost & Time	006	SPEC	SPMO	\$ 0.00	-	-	APPR	08-10-2011	Contract	T4255	
Change Orders	007	SPEC	SPMO	\$ 0.00	-	-	APPR	08-10-2011	CO Number	014	
Estimates	008	SPEC	SPMO	\$ 0.00	-	-	APPR	08-10-2011	Seq	1	
CEI / CCEI	009	WE	WEA2	\$ 0.00	-	-	APPR	06-01-2011	Amount	\$ 16,254.94	
Vendors/Subcontractors	010	WE	WEA2	\$ 0.00	2	-	APPR	09-01-2011	Prem Cost	\$ 8,483.99	
Contacts	011	SA	MNC	\$ 0.00	-	1	APPR	11-16-2011	Prem Cost Desc. ADDITION AND DELETION OF PAYITEMS FOR DRAINAGE ARE DUE TO ERRORS WITH THE PAY ITEMS INCLUDED IN THE CONTRACT. SHVA DIFFERENCE FROM NEW UNIT PRICES IS THE PREMIUM PORTION.		
External Links	012	WE	WEA2	\$ 0.00	1	-	APPR	10-03-2011	Days Added	0	
Notes (0)	013	HTEX	HEX	\$ 0.00	1	-	APPR	10-03-2011	Reason Code	115	
Reports	014	SA	MNC	\$ 175,537.34	-	3	APPR	03-07-2012	Reason Description	Required drainage modifications	
CPRR	015	WE	WEA2	\$ 0.00	13	-	APPR	11-09-2011	Responsible Party	1	
Value Added	016	WE	WEA2	\$ 0.00	1	-	APPR	12-06-2011	Claim/Extend	N	
Feature Search Criteria	017	HTEX	HEX	\$ 0.00	3	-	APPR	12-06-2011	Description CONTRACT PLANS SUMMARY OF DRAINAGE ITEMS AND CONTRACT PAY ITEMS DID NOT MATCH WITH THE DRAINAGE CROSS SECTIONS, WHICH REQUIRED DIFFERENT DRAINAGE STRUCTURE TYPES/SIZES. REDUCE THE INCORRECT PAY ITEMS AND ADD NEW PAY ITEMS TO CORRECT THE PLAN ERROR.		
Feature Search Results	018	SPEC	SPMO	\$ 0.00	-	-	APPR	02-23-2012	ISSUE_TRAK_ID	-	
Value Added Features	019	WE	WEA2	\$ 0.00	1	-	APPR	02-01-2012	Last Updated By	CN412DR	
Reports	020	HTEX	HEX	\$ 0.00	8	-	APPR	02-01-2012	Last Updated On	03-08-2012 12:00 AM	
Features	021	HTEX	HEX	\$ 0.00	2	-	APPR	02-19-2012			
Contact Management	022	UN	PLMD	\$ 926,530.79	78	1	APPR	04-16-2012			
Reminders	023	WE	WEA2	\$ 0.00	2	-	APPR	03-12-2012			
Feedback	024	SA	MNC	\$ 82,256.62	-	1	APPR	04-10-2012			
10pt Font (In Use)	025	WE	WEA2	\$ 0.00	1	-	APPR	04-09-2012			
12pt Font	026	WE	WEA2	\$ 0.00	2	-	APPR	05-20-2012			
	027	WE	WEA2	\$ 0.00	4	-	APPR	06-25-2012			
	028	HTEX	HEX	\$ 0.00	1	-	APPR	06-25-2012			
	029	SPEC	SPMO	\$ 0.00	-	-	APPR	07-05-2012			
	030	SPEC	SPMO	\$ 0.00	-	-	APPR	07-05-2012			
	031	SPEC	SPMO	\$ 0.00	-	-	APPR	07-05-2012			
	032	SA	CHCO	\$ 0.00	-	6	APPR	07-10-2012			
	033	CN	CONT	\$ 150,000.00	-	-	PEND	-			
	034	WE	WEA2	\$ 0.00	3	-	APPR	07-18-2012			

Managing RTM Issues/RFI (Add, Update, Remove, Reconcile)

The PSEE Project Manager has the access to manage the RTM issues/RFI's. Other Users must be granted the *Manage Issue* access/privilege to manage issues/RFI's.

Adding RTM Issue/RFI

Issues can be created in RTM manually or by an automatic issue entry –Batch Process. The batch process pulls all the Change Orders and the Line item adjustments against the Initial Contingency Pay items from CCTS to RTM. These are then saved in RTM as issues under **New** status, which are later manually tracked, updated and resolved. The status of the issue can be managed by the user according to the changes/updates made to the issue. The batch process brings over all the Change Orders and Line item Adjustments with **Avoidable code 1&3 and Premium Cost amount > \$0.00**

To add an issue/RFI manually, click on **Add RFI/Issue**.

Type	Seq	Status	Avoidable Code	Consultant Contract	Premium Cost	Negotiated Recovery Amount	Total Amount Recovered	Comment
Contract: T4255								
Change Order: 014								
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 8,483.99	\$ 10,000.00	
[View]	SA	2	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 0.00		Issue discovered on site ... [Remove]
Change Order: 024								
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 24,365.75	\$ 12,300.00	\$ 11,000.00 This is a new issue [View in CIM]
Line Item: 0007								
[View]	CONN	4	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 5,443.89		[View in CIM]
[View]	CONF	1	New	1-Avoidable-Prod Consultant	C8F27	\$ 11,236.62	\$ 11,000.00	
Request for Information Issues/Potential E&O Issue								
[View]			In Review	1-Avoidable-Prod Consultant	C8F27			[Remove] [Reconcile]

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50

[\[Add RFI/Issue\]](#)

Click on **Add RFI/Issue** to open a new window to enter E&O issue/RFI information.

Add RFI/Issue

Construction Contract:

Change Order:

Line Item:

Consultant Contract:

Status:


Avoidable Code:

Negotiated Recovery Amount:

Discovery Date:

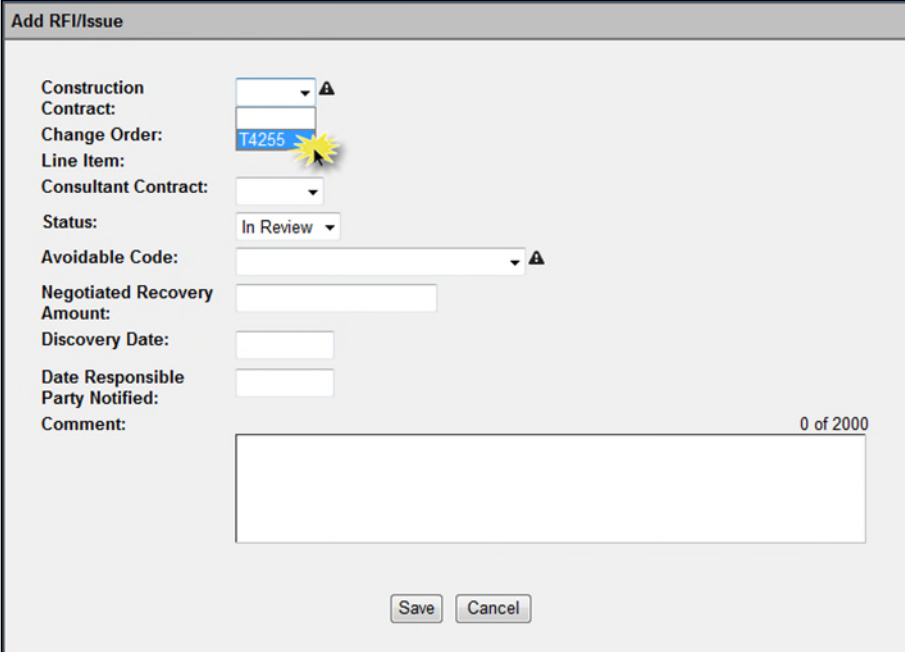
Date Responsible Party Notified:

Comment:

When entering a new issue, the required fields are marked with a  sign. While managing an issue, all fields are required before resolution (except comments).

Steps for **Adding a new E&O Issue** within RTM

1: Select the contract for which an issue is to be created. (Required)



2: Once a construction contract is selected, the user can either select a Change Order or a Line Item Adjustment associated to that issue **OR** move to the next field without making a selection.

- If a Change Order or a Line Item is selected, the Premium Cost and the Avoidable code field is automatically pulled from CCTS (Auto-Manual Process)



Add RFI/Issue

Construction Contract: T4255

Change Order: 0-Unavoidable-No Action Required - 011 1 (SA): PLANS ALLOWED FOR OPTIONA...
[\[Select Change Order\]](#)

Line Item: [\[Select Line Item\]](#)

Consultant Contract: [Empty]

Status: In Review

Avoidable Code: 0-Unavoidable-No Action Required ⚠

Negotiated Recovery Amount: [Empty]

Discovery Date: [Empty]

Date Responsible Party Notified: [Empty]

Comment: [Empty] 0 of 2000

Save Cancel

Avoidable code and Premium cost are automatically populated when an Change Order or a Line Item is selected.

- If a Change Order or a Line Item is **NOT** selected, it is then considered as an RFI. The user can **Reconcile** the RFI later with a Change Orders or Line Items which are brought over from CCTS. Once reconciled, the RFI becomes an E&O issue.

3: Select **Consultant Contract #** associated with the issue from the dropdown list.

Add RFI/Issue

Construction Contract: T4255

Change Order: 0-Unavoidable-No Action Required - 011 1 (SA): PLANS ALLOWED FOR OPTIONA...
[\[Select Change Order\]](#)

Line Item: [\[Select Line Item\]](#)

Consultant Contract: C8F27 - T.Y. LIN INTERNATIONAL ⭐

Status: In Review

Avoidable Code: 0-Unavoidable-No Action Required ⚠

Negotiated Recovery Amount: [Empty]

Discovery Date: [Empty]

Date Responsible Party Notified: [Empty]

Comment: [Empty] 0 of 2000

Save Cancel

Once a Consultant Contract is selected, other essential information about the consulting firm is automatically populated at the **Issue Details** screen.

The screenshot displays the 'Issue Details' screen in the Resolution Tracking Module (RTM). The page title is 'RTM (Click to collapse)'. A link 'Return to Issue List' is at the top left. An '[Edit]' link is at the top right. The main content area is divided into several sections:

- Construction Contract:** T4256
- Change Order Number:** 014
- Change Order Type:** SA
- Discovery Date:** 6/19/2012
- Date Responsible Party Notified:** 6/20/2012
- Consulant Contract:** C8F27
- Responsible Party Name:** T.Y. LIN INTERNATIONAL
- Status:** In Review
- Avoidable Code:** 1-Avoidable-Prod Consultant
- Premium Cost:** \$ 8,483.99
- Negotiated Recovery Amount:** \$ 8,483.99
- Date Issue Resolved:** (empty)
- Vendor FEID #:** F941598707002
- Responsible Party Address:** 201 ALHAMBRA CIRCLE, SUITE 900, CORAL GABLES, FL 33134

A red box highlights the 'Consulant Contract' and 'Responsible Party Name' fields. A red arrow points from a text annotation to this box: 'Automatically populated when the Consultant contract # is selected while adding an issue.' Below these fields are sections for 'Comment', 'Recovery Information', 'Internal Contacts', 'External Contacts', and 'PSEE Issue Documents', each with a 'Click to collapse' link and an 'Add' link.

4: Select a **status** for the issue.

- **NEW** – This is the status of issues identified by the system generated batch process that have no other information entered, and have not been reconciled with a RFI. These E&O issues have an Avoidable Code of 1 or 3 and have a Premium Cost > \$0.00.
- **IN REVIEW** – An E&O issue/RFI that has been identified in construction and is now being tracked by the user for resolution. The user can change this to **RESOLVED** when all the required information for the issue/RFI has been entered.
- **RESOLVED** – An Issue status can be set as resolved when all negotiated monies or services that can be recovered have been recovered...or the issue has been determined to be a non-issue. The user cannot change the status of **RESOLVED** issues, only users with Manage Issue- Admin privilege. Only the users with this privilege can resolve an E&O issue.

5: Select Avoidable Code (Required when adding issue)

6: Enter the date when the issue was discovered (Required before resolving issue)

7: Enter the date when the responsible party for the issue was notified (Required before resolving issue)

8: Enter any comments related to the issue (Not Required)

Updating E&O Issue

Once an issue has been added/created in RTM, a user with *Manage Issue* privilege can update the issue details for tracking and resolution. From the **List issue** screen, click on **View** to expand the issue details.

Type	Seq	Status	Avoidable Code	Consultant Contract	Premium Cost	Negotiated Recovery Amount	Total Amount Recovered	Comment
Contract: T4255								
Change Order: 014								
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 8,483.99	\$ 10,000.00	
[View]	SA	2	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 0.00		Issue discovered on site ... [Remove]
Change Order: 024								
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	\$ 24,365.75	\$ 12,300.00	\$ 11,000.00 This is a new issue [View in CIM]
Line Item: 0007								
[View]	CONN	4	In Review	1-Avoidable-Prod Consultant	C8F27	\$ 5,443.89		
[View]	CONF	1	New	1-Avoidable-Prod Consultant	C8F27	\$ 11,236.62	\$ 11,000.00	
Request for Information Issues/Potential E&O Issue								
[View]			In Review	1-Avoidable-Prod Consultant	C8F27			[Remove] [Reconcile]

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50
[\[Add RFI/Issue\]](#)

The user can add/update other issue information like managing Amount Recovery Information, Internal/External contacts and Uploading documents from the issue details screen.

RTM (Click to collapse)		[Edit]
Return to Issue List		
Construction Contract:	T4255	Status: In Review
Change Order Number:	014	Avoidable Code: 1-Avoidable-Prod Consultant
Change Order Type:	SA	
Discovery Date:	6/19/2012	Premium Cost: \$ 8,483.99
Date Responsible Party Notified:	6/20/2012	Negotiated Recovery Amount:
Consultant Contract:	C8F27	Date Issue Resolved:
Responsible Party Name:	T.Y. LIN INTERNATIONAL	Vendor FEID #: F941598707002
		Responsible Party Address: 201 ALHAMBRA CIRCLE SUITE 900 CORAL GABLES , FL 33134
Comment:		
Recovery Information (Click to collapse)		
There are currently no Recovery Information items to display [Add Recovery Information] Click to collapse/expand Recovery Information		
Internal Contacts (Click to collapse)		
Currently there are no Internal Contacts set for this Issue [Add Internal Contact]		
External Contacts (Click to collapse)		
Currently there are no External Contacts set for this Issue [Add External Contact]		
PSEE Issue Documents (Click to collapse)		
No Documents Found [Upload Document]		

Once an issue is set as **Resolved**, a user cannot make any further changes to the issue. A warning message is displayed when a user sets the issue under **Resolved** status. Only users with *Manage Issue- Admin* privilege can edit/update the issue once it's resolved. This privileged user can also set the status of the issue back to **New** or **In Review**, which then allows the users with *Manage Issues* privilege to edit/update an issue again.

The screenshot shows the 'Edit Issue' form with the following fields and values:

- Consultant Contract: C8F27 - T.Y. LIN INTERNATIONAL
- Status: Resolved
- Avoidable Code: 3-Avoidable-Consultant CEI
- Negotiated Recovery Amount: (empty)
- Discovery Date: 7/2/2012
- Date Responsible Party Notified: 7/3/2012
- Comment: (empty text area, 0 of 2000 characters)

Buttons: Save, Cancel

The screenshot shows the 'Edit Issue' form with a confirmation dialog box overlaid. The dialog box contains the following text:

Message from webpage

Are you sure you want to Resolve this Issue? It will become uneditable except by an RTM Administrator.

Buttons: OK, Cancel

The OK button is highlighted with a red box, and a mouse cursor is pointing at it.

Managing Recovery Information

Users can add amount recovery information that is associated with an issue.

1. Select **Add Recovery Information link** from the Recovery Information section

The screenshot shows the RTM interface with the following details:

- RTM (Click to collapse)**
- [Return to Issue List](#)
- Construction Contract:** T4255
- Change Order Number:** 014
- Change Order Type:** SA
- Discovery Date:** 6/19/2012
- Date Responsible Party Notified:** 6/20/2012
- Consultant Contract:** C8F27
- Responsible Party Name:** T.Y. LIN INTERNATIONAL
- Status:** In Review
- Avoidable Code:** 1-Avoidable-Prod Consultant
- Premium Cost:** \$ 8,483.99
- Negotiated Recovery Amount:**
- Date Issue Resolved:**
- Vendor FEID #:** F941598707002
- Responsible Party Address:** 201 ALHAMBRA CIRCLE SUITE 900 CORAL GABLES, FL 33134
- Comment:**
- Recovery Information (Click to collapse)**
 - There are currently no Recovery Information items to display
 - [Add Recovery Information](#)
- Internal Contacts (Click to collapse)**
 - Currently there are no Internal Contacts set for this Issue
 - [Add Internal Contact](#)
- External Contacts (Click to collapse)**
 - Currently there are no External Contacts set for this Issue
 - [Add External Contact](#)
- PSEE Issue Documents (Click to collapse)**
 - No Documents Found
 - [Upload Document](#)

A dialog box with appropriate fields will display to add any Recovery Information.

2. A new window will open. Begin entering the recovery information for the issue by choosing a Recovery Date, Amount Recovered and the Method of Recovery. All the fields except comments are required when entering any recovery information.

The 'Add Issue Recovery Information' dialog box contains the following fields:

- Recovery Date:** 06/13/2012
- Amount Recovered:** 5000
- Method Of Recovery:** Claim Meetings
- Comment:** Test

Buttons: Save, Cancel

3. Select **Save** when all needed information has been updated or entered.

4. The Recovery Information will be created and displayed in the Recovery Information section.

Recovery Information (Click to collapse)				
Recovery Date	Amount Recovered	Method Of Recovery	Comment	
6/13/2012	\$ 5,000.00	Claim Meetings	Test	[Edit] [Remove]

[\[Add Recovery Information\]](#)

Editing or Removing Recovery Information

Information about an External Contact may be edited or removed after it is added.

1. To Edit any Recovery Information, select the **Edit** link to the right of their Recovery information.

Recovery Information (Click to collapse)				
Recovery Date	Amount Recovered	Method Of Recovery	Comment	
6/13/2012	\$ 5,000.00	Claim Meetings	Test	[Edit] [Remove]
6/14/2012	\$ 2,000.00	Negotiations		[Edit] [Remove]

[\[Add Recovery Information\]](#)

2. The details about the Recovery Information are displayed. Update the needed information and select **Save**.

Edit Issue Recovery Information

Recovery Date:

Amount Recovered:

Method Of Recovery:

Comment: 26 of 255

3. To Remove any Recovery Information, select the **Remove** link to the right of the Recovery Information details.

Recovery Information (Click to collapse)				
Recovery Date	Amount Recovered	Method Of Recovery	Comment	
6/13/2012	\$ 5,000.00	Claim Meetings	Test	[Edit] [Remove]
6/14/2012	\$ 2,000.00	Negotiations		[Edit] [Remove]

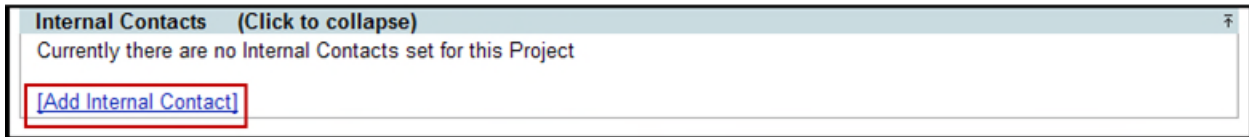
[\[Add Recovery Information\]](#)

4. A confirmation dialog box will display. Select **OK** to remove the Contact.

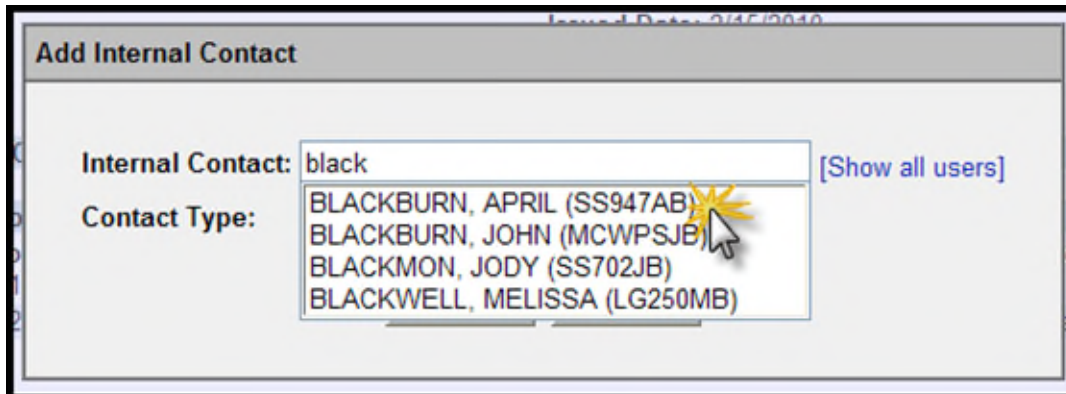
Managing Internal Contacts

Users may also document Internal Contacts that are associated with a Permit.

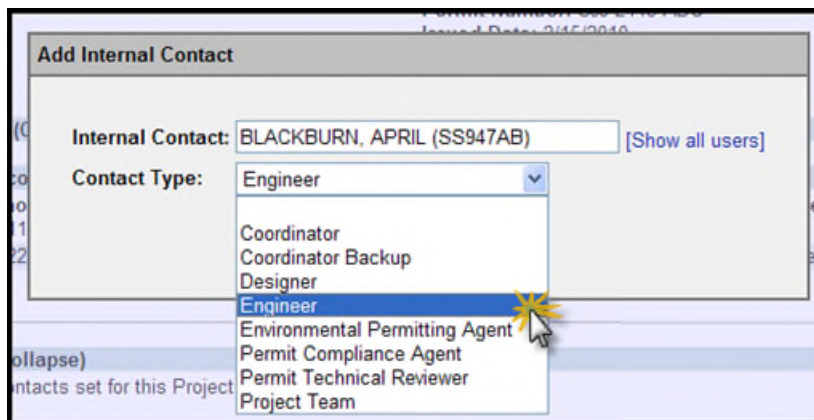
1. From the Internal Contacts section, select the **Add Internal Contact** link.



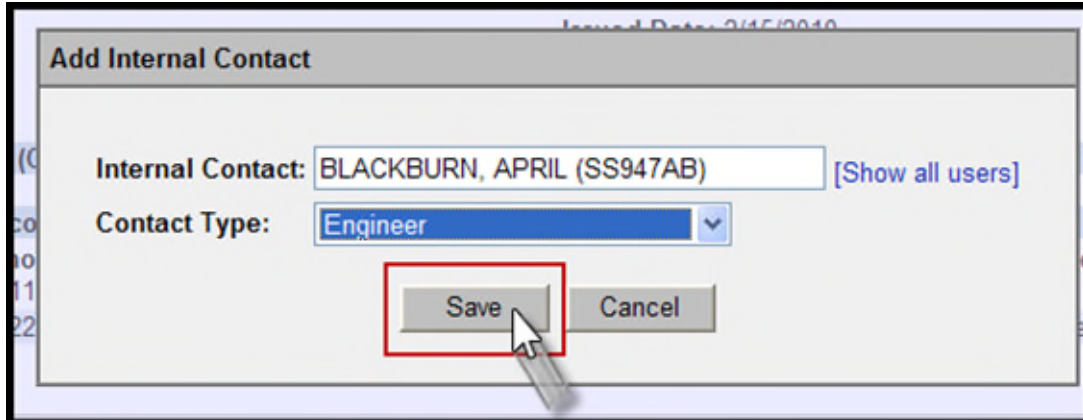
2. In the **Internal Contact** text box, enter the full or partial name of the FDOT staff member and select the required name from the displayed list



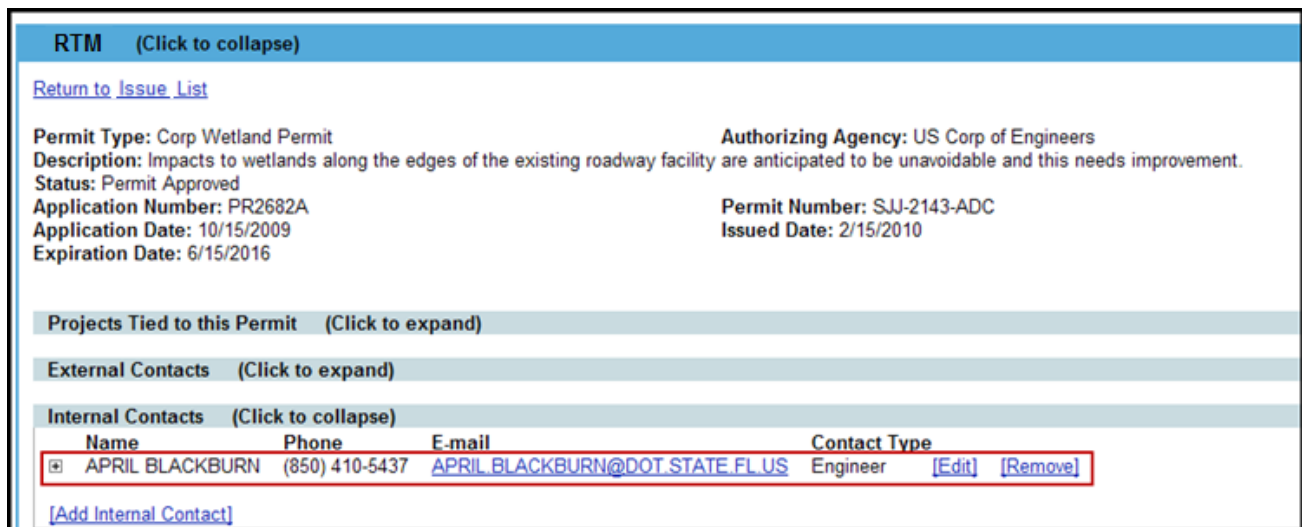
3. Select a required **Contact Type** from the Contact Type drop down



4. Select the **Add** button to add the Internal Contact



5. The Internal Contact is created and displayed in the Internal Contact section.



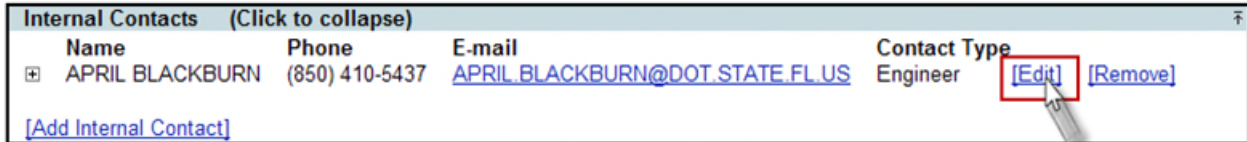
6. To see additional details about this Internal Contact select the plus sign to the left of the Contact Name.



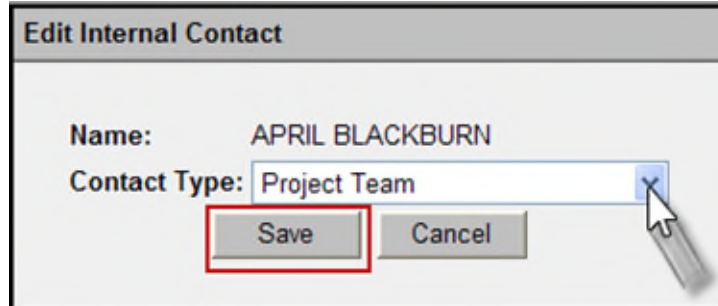
Editing or Removing Internal Contacts

Users may edit or remove information related to Internal Contacts.

1. Only the Contact Type can be edited for Internal Contacts. Select the **Edit** link to the right of the Contact information.



2. Select a different Contact type from the Contact Type drop down and select **Save** button



3. If an Internal Contact should no longer be associated with an issue it can be removed. Select the **Remove** link to the right of the Contact of the contact details.



4. A confirmation dialog box will display. Select the **OK** button to remove the Internal Contact.

Managing External Contacts

Users can document External Contacts that are associated with an Issue.

1. Select the **Add External Contact** link from the External Contacts section.

The screenshot displays the RTM (Resolution Tracking Module) interface. At the top, there is a blue header bar with the text "RTM (Click to collapse)" and a small icon. Below the header, there is a "Return to Issue List" link. The main content area is divided into two columns of key-value pairs. The left column includes: Construction Contract: T5322, Change Order Number: 008, Change Order Type: WOTA, Discovery Date: (blank), Date Responsible Party Notified: (blank), Design Contract #: C8G58, and Responsible Party Name: DYER, RIDDLE, MILLS & PRECOURT. The right column includes: Status: New, Avoidable Code: 1-Avoidable-Prod Consultant, Premium Cost - Initial: \$ 0.00, Premium Cost - Final: (blank), Date Issue Resolved: (blank), Vendor FEID #: F591791174001, and Responsible Party Address: 941 LAKE BALDWIN LN., STE. 100 ORLANDO , FL 32814. There is an "[Edit]" link in the top right corner. Below the key-value pairs is a "Comment:" field. Underneath, there are three expandable sections: "Recovery Information (Click to collapse)" with a message "There are currently no Recovery Information items to display" and an "[Add Recovery Information]" link; "Internal Contacts (Click to collapse)" with a message "Currently there are no Internal Contacts set for this Issue" and an "[Add Internal Contact]" link; and "External Contacts (Click to collapse)" with a message "Currently there are no External Contacts set for this Issue" and an "[Add External Contact]" link. A red box highlights the "[Add External Contact]" link, and a mouse cursor is pointing at it.

A dialog box with appropriate fields will display to add an External Contact.

2. A new window will open. Begin typing the name of the Contact in the **Name** field. A list of matching names will begin to form just below. Select the contact from this list and PSEE will automatically populate the remaining fields.
3. If the needed contact does not appear in the list, continue typing the complete name and simply fill out the contact information as needed. The information must include at least one form of contact for the customer (email address, phone number or postal address).
4. Select **Save** when all needed information has been updated or entered.

- The contact will be created and displayed in the External Contact section. Select the plus sign to the left of the contact name to display all of their contact information.

External Contacts (Click to collapse)

Name	Phone	E-mail	Organization	Contact Type	
James Engineer	(111) 222-3333	james@uscg.gov	US Corp of Engineers	Engineer	[Edit] [Remove]
<p>Title: Chief Engineer Address: 111 Coast Guard Way Tallahassee, FLORIDA Website Address: www.uscg.gov/tally Comment: This is the only project that uses this Contact.</p>					
Sue Smith	(222) 333-4444	sue@uscg.gov		Agency Reviewer	[Edit] [Remove]

[\[Add External Contact\]](#)

Editing or Removing External Contacts

Information about an External Contact may be edited or removed after it is added.

- To Edit an External Contact, select the **Edit** link to the right of their contact information.

Project Info [428736-1] (Click to expand)

RTM (Click to collapse)

[Return to Issue List](#)

Permit Type: Corp Wetland Permit **Authorizing Agency:** US Corp of Engineers
Description: Impacts to wetlands along the edges of the existing roadway facility are anticipated to be unavoidable and this needs improvement.
Status: Permit Approved
Application Number: PR2682A **Permit Number:** SJJ-2143-ADC
Application Date: 10/15/2009 **Issued Date:** 2/15/2010
Expiration Date: 6/15/2016

Projects Tied to this Permit (Click to expand)

External Contacts (Click to collapse)

Name	Phone	E-mail	Organization	Contact Type	
James Engineer	(111) 222-3333	james@uscg.gov	US Corp of Engineers	Engineer	[Edit] [Remove]
Sue Smith	(222) 333-4444	sue@uscg.gov		Agency Reviewer	[Edit] [Remove]

[\[Add External Contact\]](#)

- The details about the External Contact are displayed. Update the needed information and select **Save**.

Edit External Contact

Name: James Engineer

Title: Chief Engineer

Address Line 1: 111 Coast Guard Way

Address Line 2: Suite 123

City: Tallahassee

State: FLORIDA

Zip:

Primary Phone Number: (111) 222-3333

Ext.:

Mobile Phone Number: (111) 222-6666

Ext.:

Fax Number: (111) 222-7777

Ext.:

Email Address: james@uscg.gov

Website Address: www.uscg.gov/tally

Comment:

Organization: US Corp of Engineers

Contact Type: Engineer

Buttons: Save, Cancel

- To Remove an External Contact, select the **Remove** link to the right of the Contact details.

RTM (Click to collapse)

[Return to Issue List](#)

Permit Type: Corp Wetland Permit

Description: Impacts to wetlands along the edges of the existing roadway facility are anticipated to be unavoidable and this needs improvement.

Status: Permit Approved

Application Number: PR2682A

Application Date: 10/15/2009

Expiration Date: 6/15/2016

Authorizing Agency: US Corp of Engineers

Permit Number: SJJ-2143-ADC

Issued Date: 2/15/2010

Projects Tied to this Permit (Click to expand)

External Contacts (Click to collapse)					
Name	Phone	E-mail	Organization	Contact Type	
James Engineer	(111) 222-3333	james@uscg.gov	US Corp of Engineers	Engineer	[Edit] [Remove]
Sue Smith	(222) 333-4444	sue@uscg.gov		Agency Reviewer	[Edit] [Remove]



[\[Add External Contact\]](#)

- A confirmation dialog box will display. Select **OK** to remove the Contact.

PSEE RTM Documents

Documents can be uploaded that support an Issue.


1. From the PSEE Permit Documents section, select the **Upload Document** link to attach a document related to a Permit.

RTM (Click to collapse)  

[Return to Issue List](#)


Construction Contract:	T4255	Status:	In Review	[Edit]
Change Order Number:	014	Avoidable Code:	1-Avoidable-Prod Consultant	
Change Order Type:	SA			
Discovery Date:	6/19/2012	Premium Cost:	\$ 8,483.99	
		Negotiated Recovery Amount:		
Date Responsible Party Notified:	6/20/2012	Date Issue Resolved:		
Consultant Contract:	C8F27	Vendor FEID #:	F941598707002	
Responsible Party Name:	T.Y. LIN INTERNATIONAL	Responsible Party Address:	201 ALHAMBRA CIRCLE SUITE 900 CORAL GABLES , FL 33134	

Comment:

Recovery Information (Click to collapse) 


There are currently no Recovery Information items to display

[\[Add Recovery Information\]](#)

Internal Contacts (Click to collapse) 


Currently there are no Internal Contacts set for this Issue

[\[Add Internal Contact\]](#)


External Contacts (Click to collapse) 

Currently there are no External Contacts set for this Issue

[\[Add External Contact\]](#)

PSEE Issue Documents (Click to collapse) 

No Documents Found

[\[Upload Document\]](#) 

2. A new window appears. Select the document you wish to upload by selecting the **Select File** button. Select the File Type (**required**) from the File Type drop down, add a description (**required**) for the document, and then select the **Save** button.

Upload Issue Document

File: 100 % Upload Complete

Test.txt

File Type: GENERAL ▼

Description: 13 of 200

Test document

Save Cancel

3. The document is now added and listed in the PSEE Permit Documents section.

PSEE Issue Documents (Click to collapse)					
EDMS Doc No	Created Date	Document Name	Description	Type	
1680824	6/20/2012	Test.txt	Test document	GENERAL	View [Edit] [Remove]

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

[\[Upload Document\]](#)

Attached documents can be managed within the Document’s details. From there you can View, Edit or Remove the document.

4. Select the **View** link to retrieve the document for display. The document will be opened in its native application.

PSEE Issue Documents (Click to collapse)					
EDMS Doc No	Created Date	Document Name	Description	Type	
1680824	6/20/2012	Test.txt	Test document	GENERAL	View [Edit] [Remove]

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

[\[Upload Document\]](#)

5. Select the **Edit** link to change the description of the document.

PSEE Issue Documents (Click to collapse)					
EDMS Doc No	Created Date	Document Name	Description	Type	
1680824	6/20/2012	Test.txt	Test document	GENERAL	View [Edit] [Remove]

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

[\[Upload Document\]](#)

6. Select the **Remove** link to remove the document from the PSEE Permit Documents section. You will be prompted with a confirmation dialog box. Select **OK** to remove the document or **Cancel** to retain it.

PSEE Issue Documents (Click to collapse)					
EDMS Doc No	Created Date	Document Name	Description	Type	
1680824	6/20/2012	Test.txt	Test document	GENERAL	View [Edit] [Remove]

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

[\[Upload Document\]](#)

Removing RFI's and E&O Issues

Users with *Manage Issue Admin* privilege can delete any manually created issue. Users with just *Manage Issue* privilege can remove RFI's from RTM at any time. RFI's are not tied to any Change Order or a Line Item can be located at the bottom of the RTM issue list screen.

1. Select the RTM issue/RFI that needs to be removed.
2. Click **Remove**.



Reconciling an RFI.

A user with *Manage Issue* privilege can **Reconcile** an RFI. Reconciliation process shall take place for issues that are created manually and do not have a Change Order #/estimate # and Adjustment type associated with it. Once a change order or Line item adjustments against the Initial Contingency Pay Item for the contract is created in CCTS and the data is pulled into RTM by the batch process, the user shall be able to reconcile any existing RFI's or manually created issues with a new issue created by the batch process. The changes that were made by the user shall remain the same (including Premium Cost & Avoidable Code), but the Change Order # or the Estimate # and the adjustment type field will be filled in for the E&O issue. The manually created issue is merged with the batch created issue.

1. Select the RFI and click **Reconcile**. RFI's that are not tied to a Change Order or a Line item can be located at the bottom of the RTM issues list for each contract and can be reconciled.

	Status	Avoidable Code	Premium Cost	Negotiated Recovery Amount	Comment
Contract: T4255 View in CIM					
Change Order: 014					
View	In Review	3-Avoidable-Consultant CEI	\$ 8,483.99		
View	In Review	1-Avoidable-Prod Consultant	\$ 0.00		Issue discovered on site ... [Remove]
Change Order: 024					
View	In Review	3-Avoidable-Consultant CEI	\$ 24,365.75	\$ 12,300.00	This is a new issue
Line Item: 0007					
View	In Review	1-Avoidable-Prod Consultant	\$ 5,443.89		
View	New	1-Avoidable-Prod Consultant	\$ 11,236.62	\$ 11,000.00	
Request for Information Issues (RFI)					
View	In Review	1-Avoidable-Prod Consultant			[Remove] [Reconcile]

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50
[\[Add RFI/Issue\]](#)

2. A new window appears. Select the **Select Change Order** or **Select Line Item** link to tie the manually created issue with a Change Order or a Line Item Adjustment.

Reconcile Issue

Existing Issue to reconcile with:

[\[Select Change Order\]](#) [\[Select Line Item\]](#)

3. A new window appears with all the Line Items available to which the issue can be tied to. Select a Line Item

Reconcile Issue [\[Return without selecting a Line Item\]](#)

	Est #	LI #	Type	Seq	Avoidable Code	
[Select]	0006	0680	CONN	1	1-Avoidable-Prod Consultant	Median cross over premium cost.
[Select]	0008	0680	CONN	1	1-Avoidable-Prod Consultant	Replace Stru OF-B in Pond B
[Select]	0008	0680	CONN	2	1-Avoidable-Prod Consultant	Mod.Stru.S-560 in Pond B
[Select]	0009	0680	CONN	2	1-Avoidable-Prod Consultant	Modify structure S 102 to match field conditions.

4. Once the selection is made. Click on **Reconcile** and confirm the message box to tie the issue with a Line Item Adjustment

Reconcile Issue

Existing Issue to reconcile with: 1-Avoidable-Prod Consultant - 0006 0680 CONN 1 1: Median cross over premium...

[\[Select Change Order\]](#) [\[Select Line Item\]](#)

Reconcile **Cancel**

Message from webpage

Are you sure you want to Reconcile this Issue?

OK **Cancel**

Reconcile **Cancel**

The Reconciled RFI is now available as an E&O issue in the List of issues which are tied to a Change Order or Line Item.

RTM (Click to collapse)

Filter list by Contract: All Contracts

Status	Avoidable Code	Premium Cost	Negotiated Recovery Amount
Contract: T4255 View in CIM			
Change Order: 014			
View	In Review	1-Avoidable-Prod Consultant	\$ 0.00
View	In Review	3-Avoidable-Consultant CEI	\$ 8,483.99
Change Order: 024			
View	In Review	3-Avoidable-Consultant CEI	\$ 24,365.75 \$ 12,300.00
Line Item: 0007			
View	New	1-Avoidable-Prod Consultant	\$ 5,443.89
View	New	1-Avoidable-Prod Consultant	\$ 11,236.62 \$ 11,000.00
Issues not tied to a Change Order or Line Item			
View	In Review	1-Avoidable-Prod Consultant	[Remove] [Reconcile]

Page 1 (Showing Items 1 to 6 of 6) Show per page 10 25 50

[\[Add Issue\]](#)