The Resolution Tracking Module

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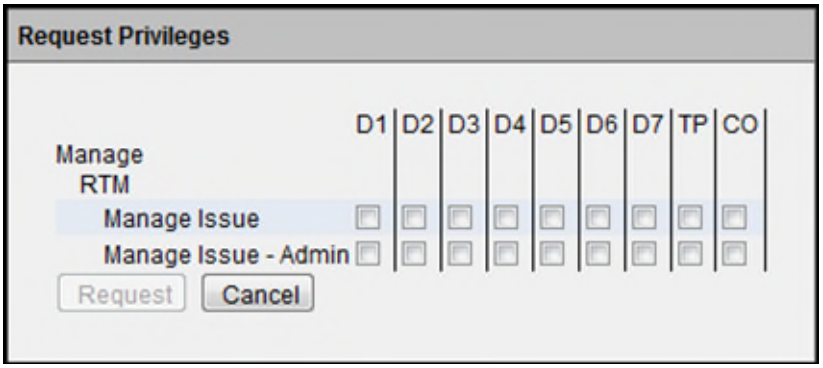
Requesting Privileges in the Resolution Tracking Module

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.



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.

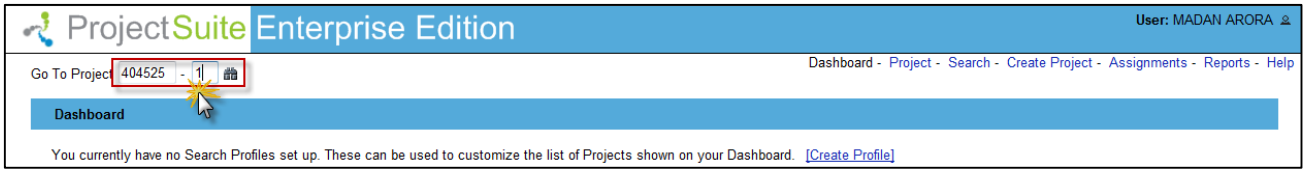
The Resolution Tracking Module

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.

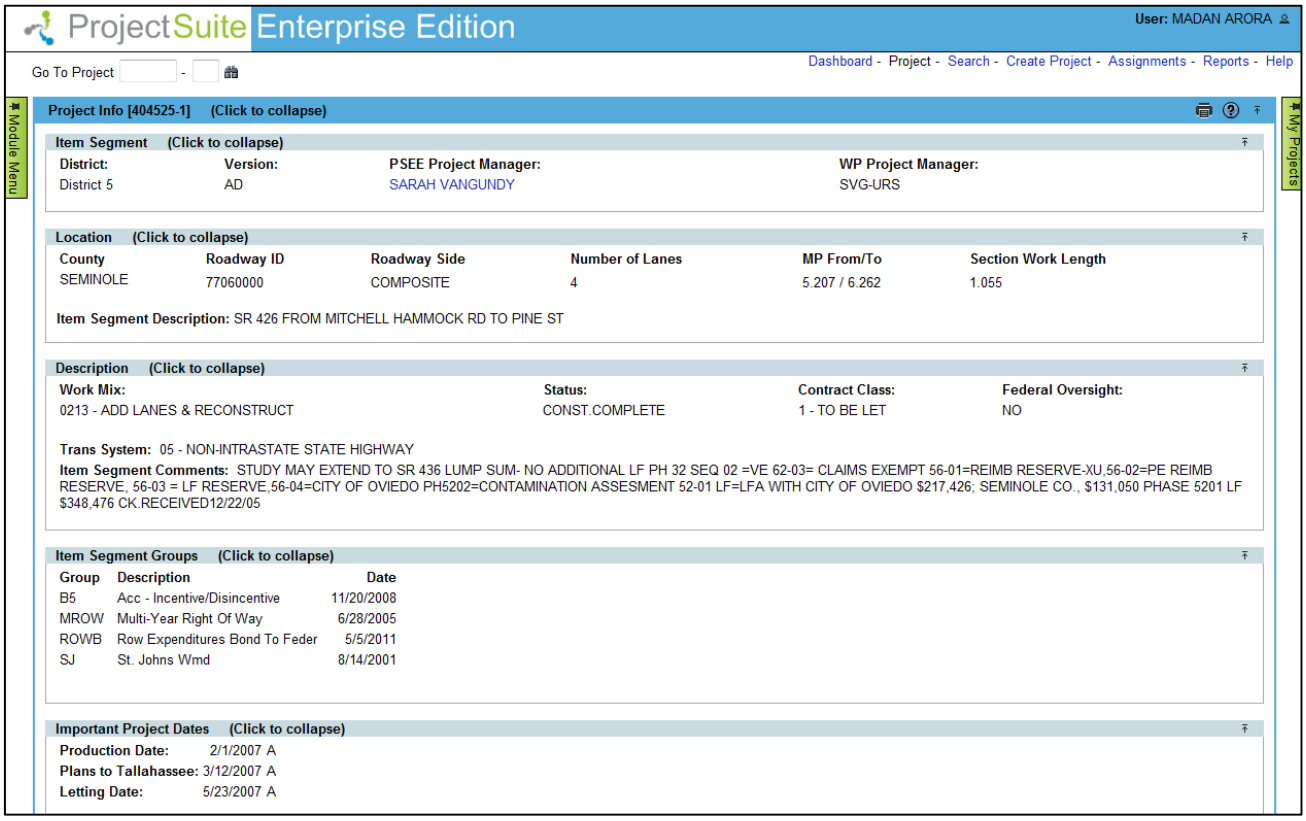
RTS is the current system being used to track E&O project issues by professional consulting engineers under contract with the Department for Design Services. It assists with the documentation and tracking of consultant responsibility for E&O project issues, identified in a Supplemental agreement, Change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

View/List contracts in RTM

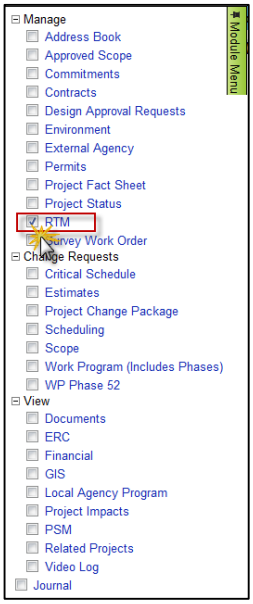
To view issues related to a contract, the RTM user shall search for a project within PSEE through the dashboard screen or a project search.



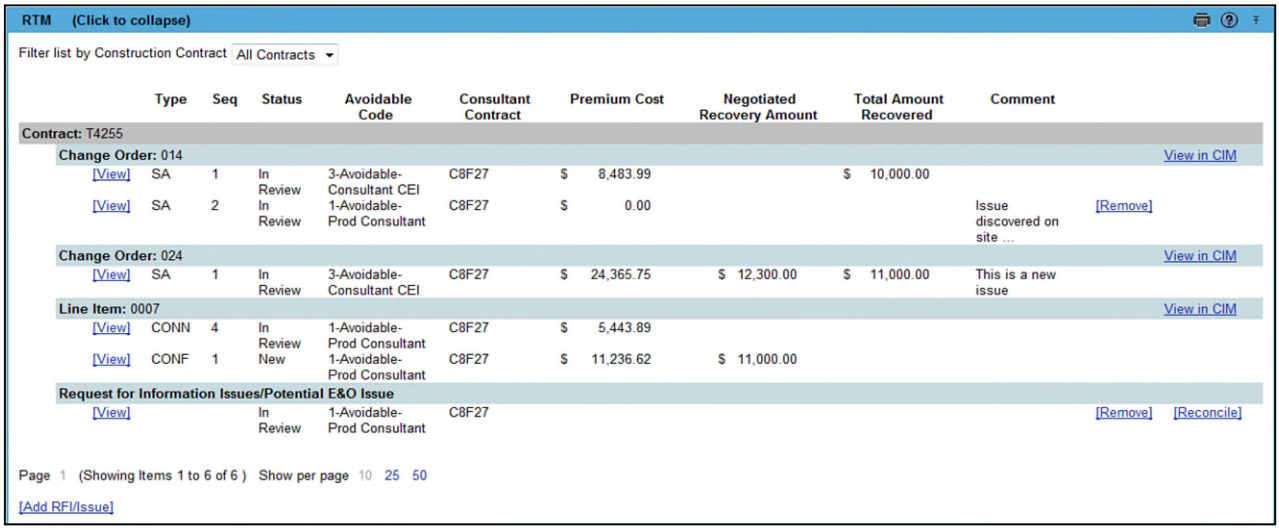
Once the search is complete, the user will see all the information related to that project



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

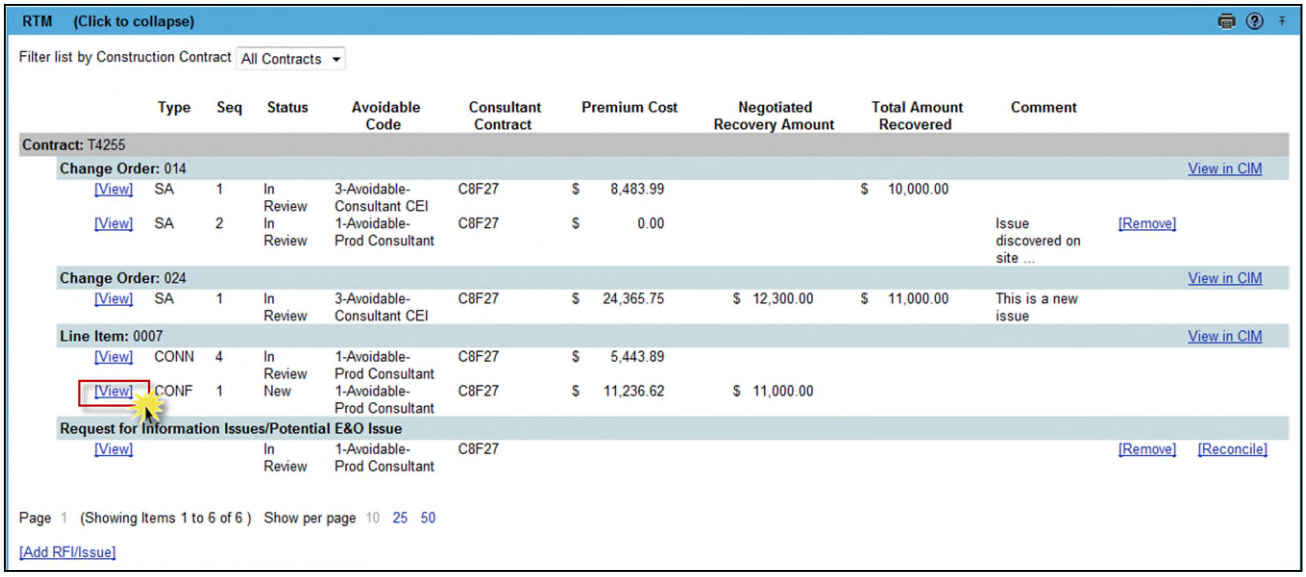
	Type	Seq	Status	Avoidable Code	Consultant Contract	Premium Cost	Negotiated Recovery Amount	Total Amount Recovered	Comment		
Contract: T4255											
Change Order: 014											View in CIM
[View]	SA	1	In Review	3-Avoidable-Consultant CEI	C8F27	$ 8,483.99		$ 10,000.00			
[View]	SA	2	In Review	1-Avoidable-Prod 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

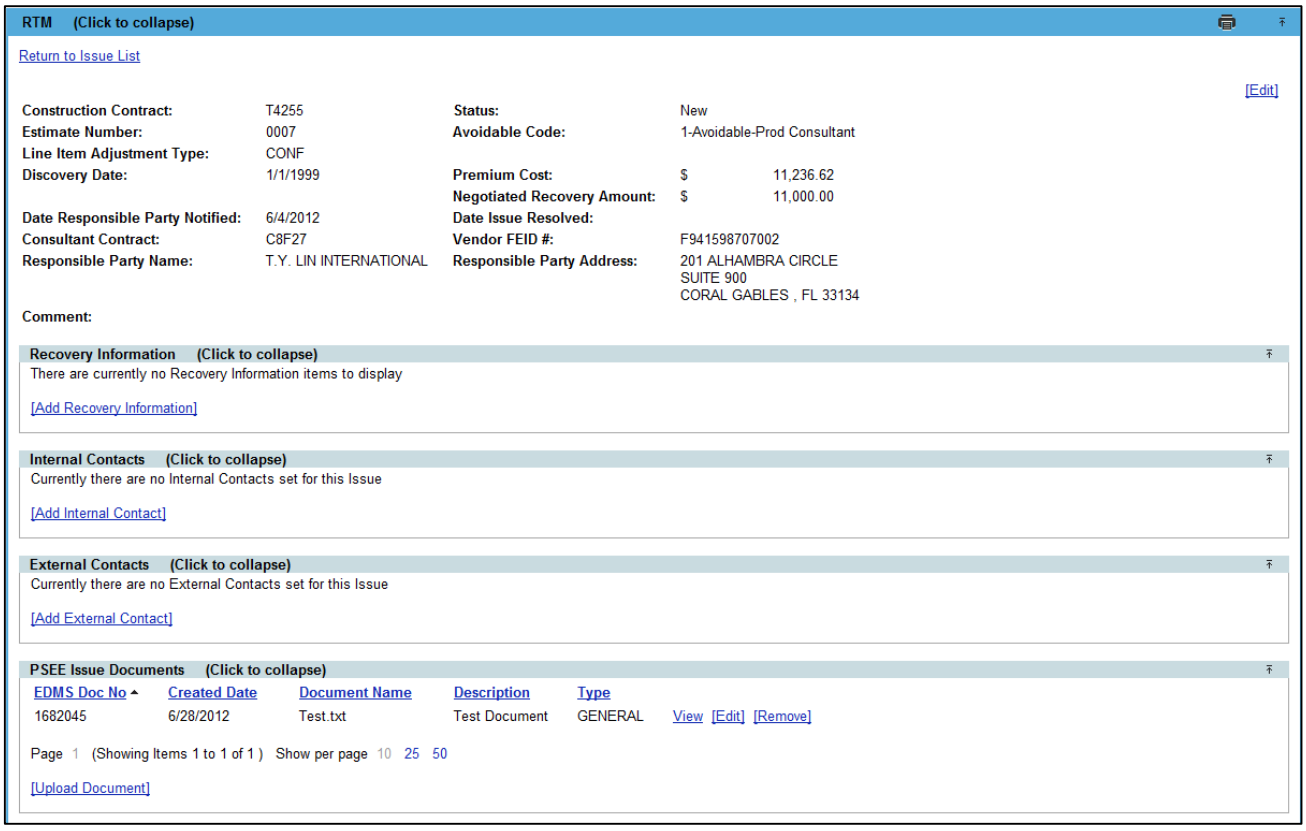
[Add RFI/Issue]

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.

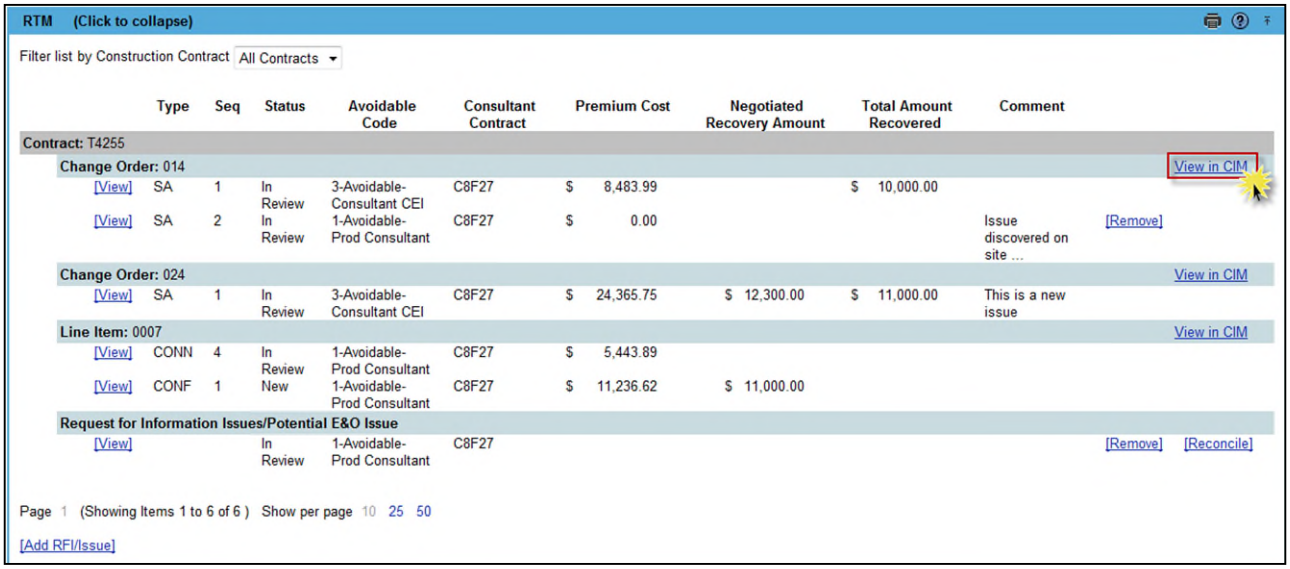


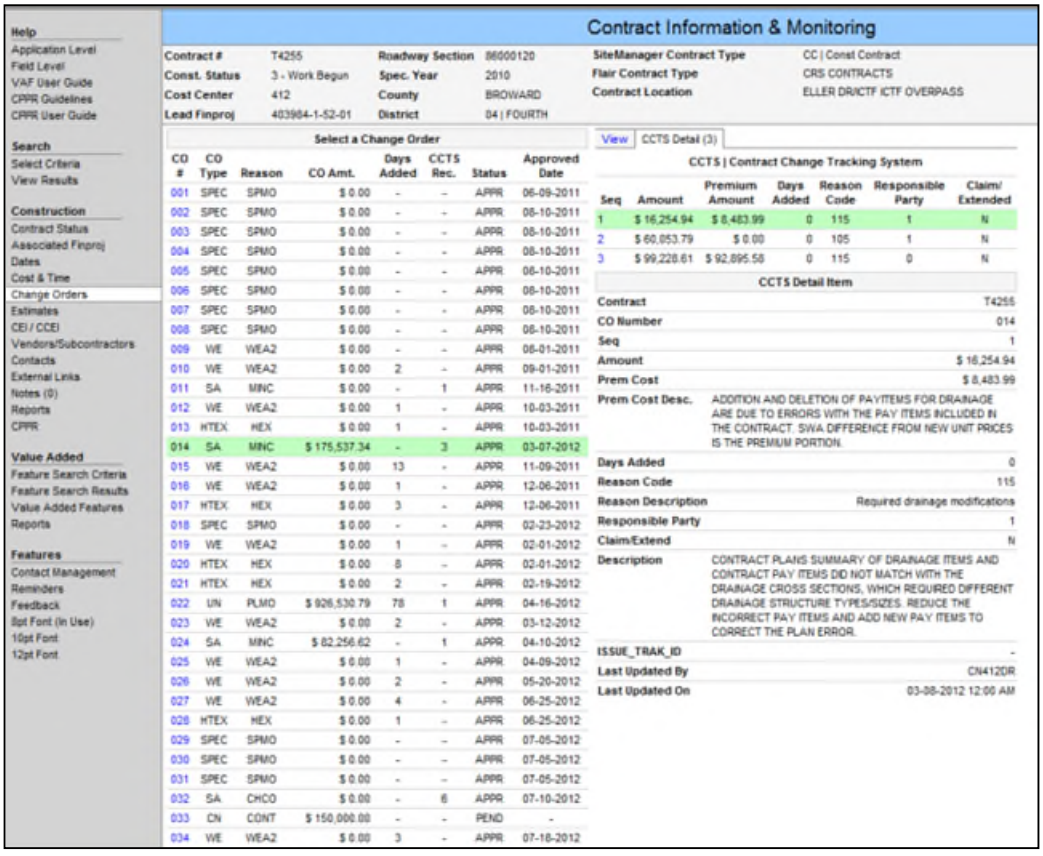
The issue detail decomposes the issue further with all the related information a user would require to resolve an issue.



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'**.



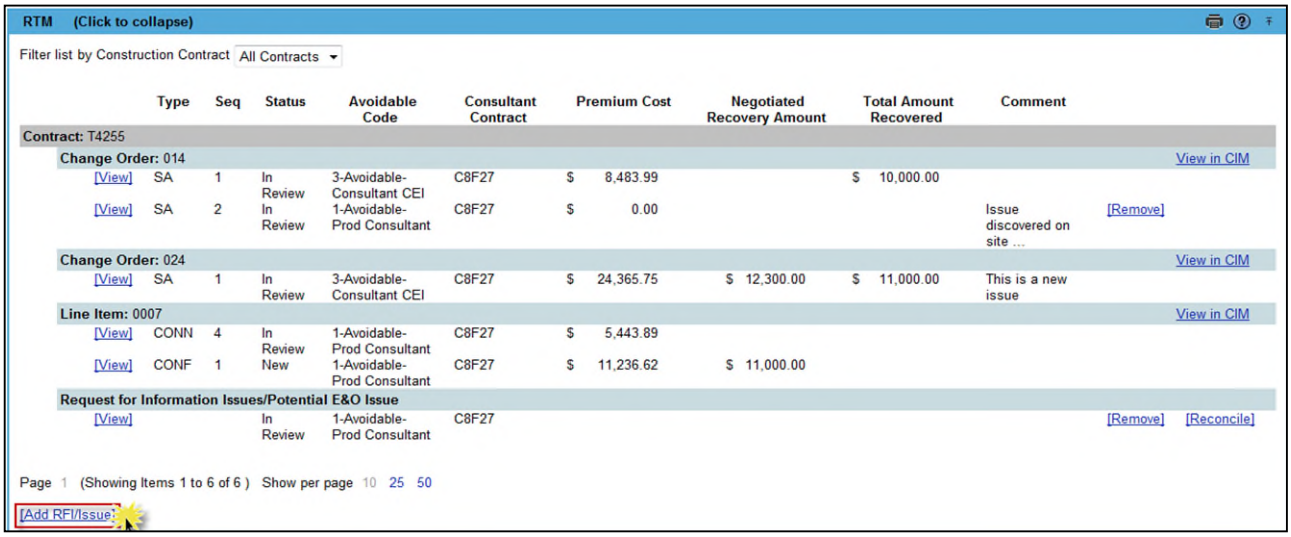


Managing RTM Issues/RFI (Add, Update, Remove, Reconcile)

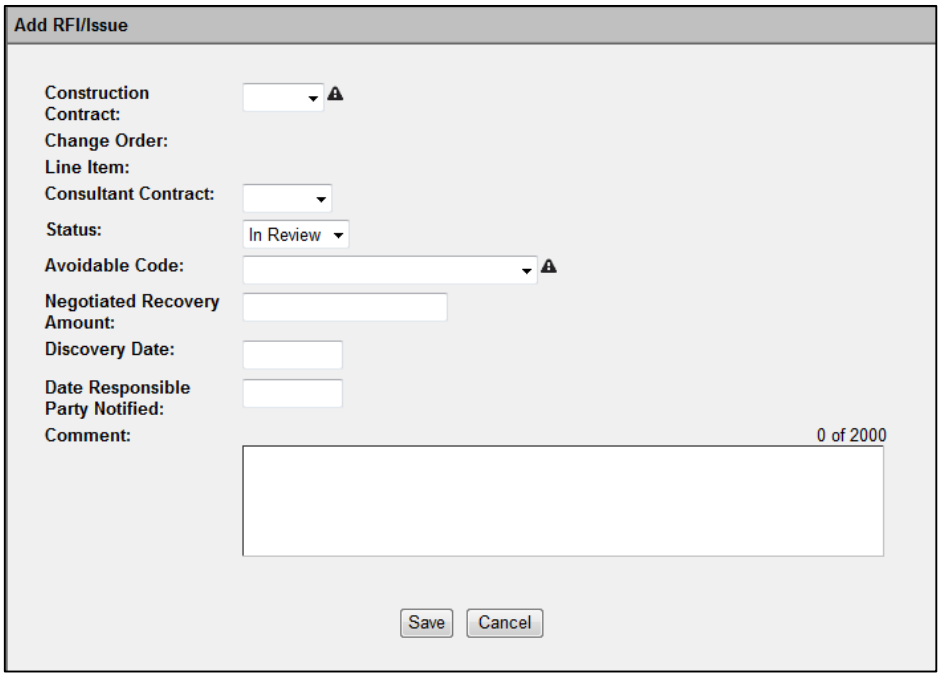
The PSEE Project Manager has the access to manage the RTM issues/RFI's. Other Users must be granted the *Manage Issue* access/privilege to manage issues/RFI's.

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**.



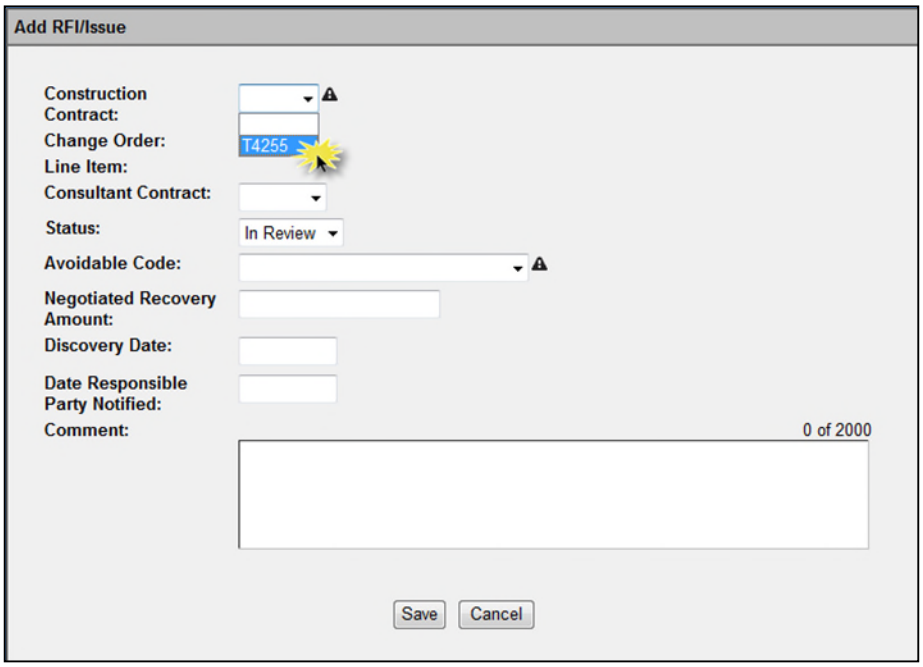
Click on **Add RFI/Issue** to open a new window to enter E&O issue/RFI information.



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).

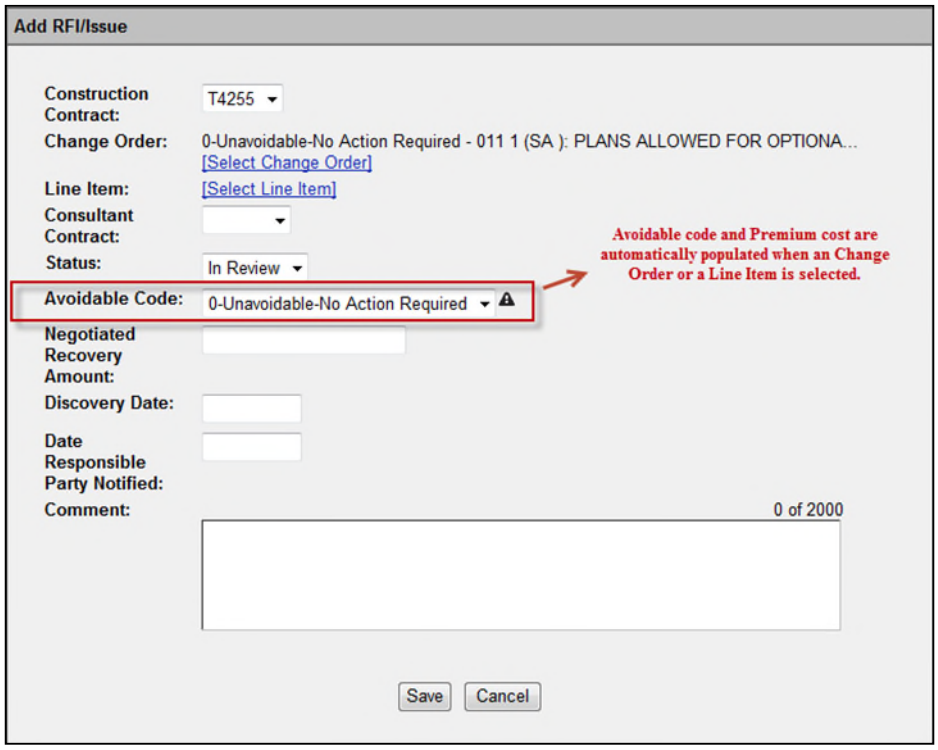
Steps for **Adding a new E&O Issue** within RTM

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



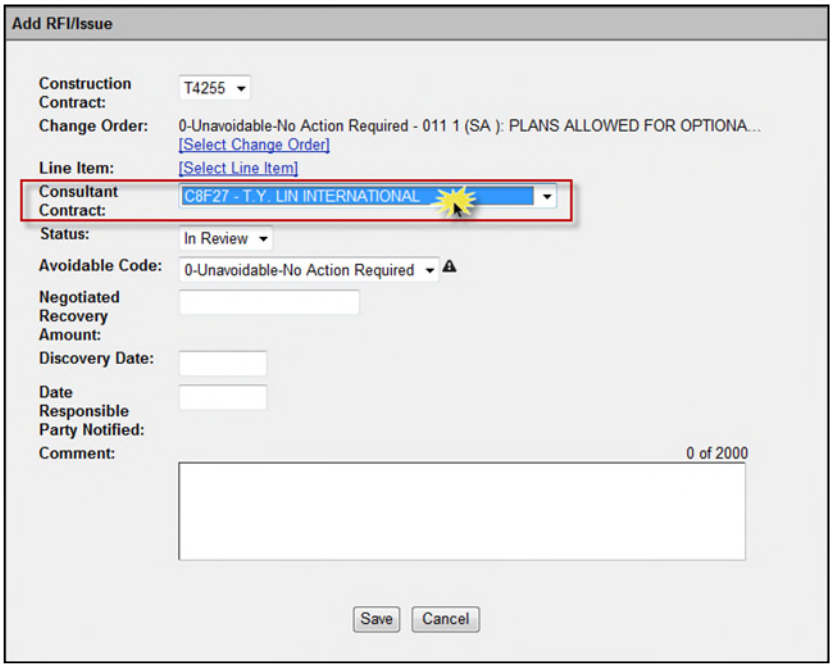
2: Once a construction contract is selected, the user can either select a Change Order or a Line Item Adjustment associated to that issue **OR** move to the next field without making a selection.

- 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)

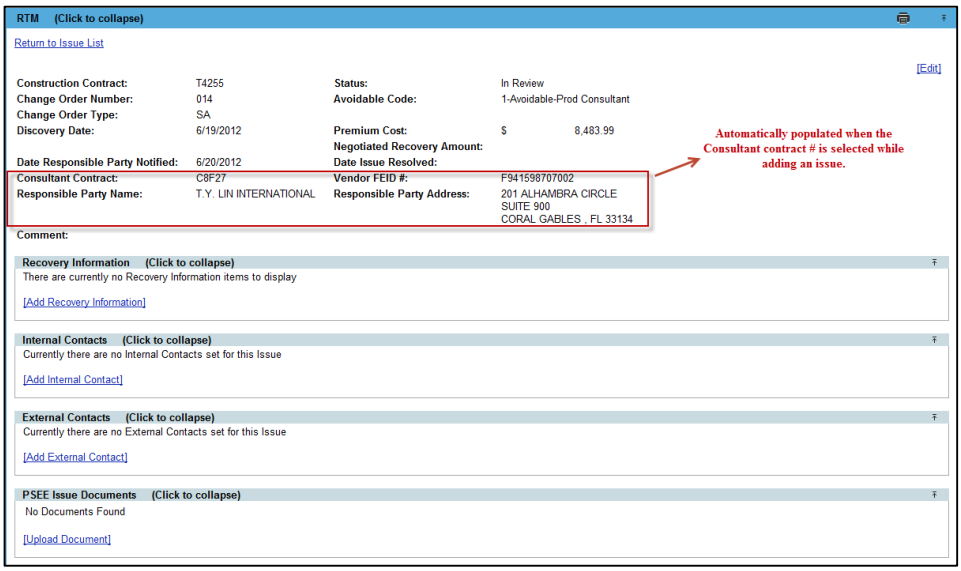


- If a Change Order or a Line Item is **NOT** selected, it is then considered as an RFI. The user can **Reconcile** the RFI later with a Change Orders or Line Items which are brought over from CCTS. Once reconciled, the RFI becomes an E&O issue.

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



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



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)

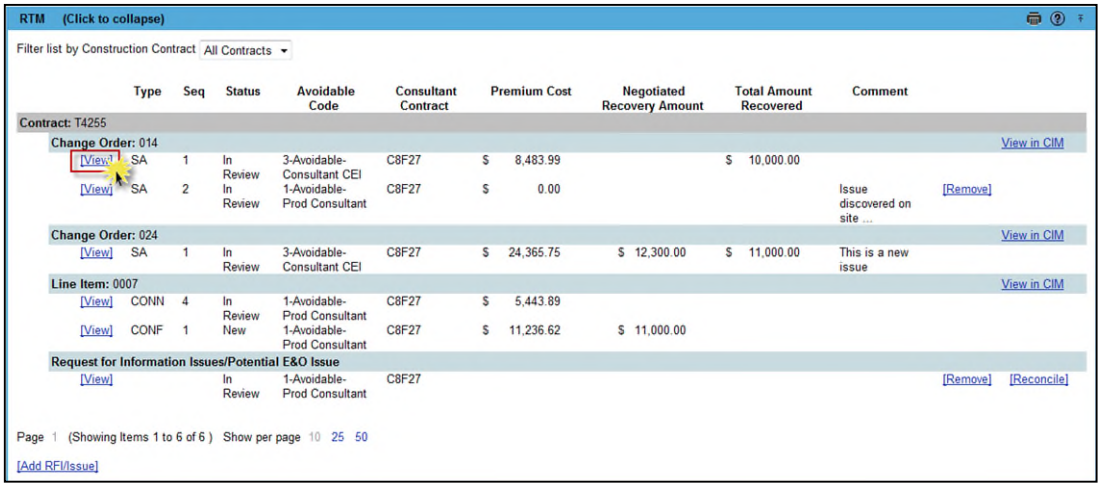
6: Enter the date when the issue was discovered (Required before resolving issue)

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

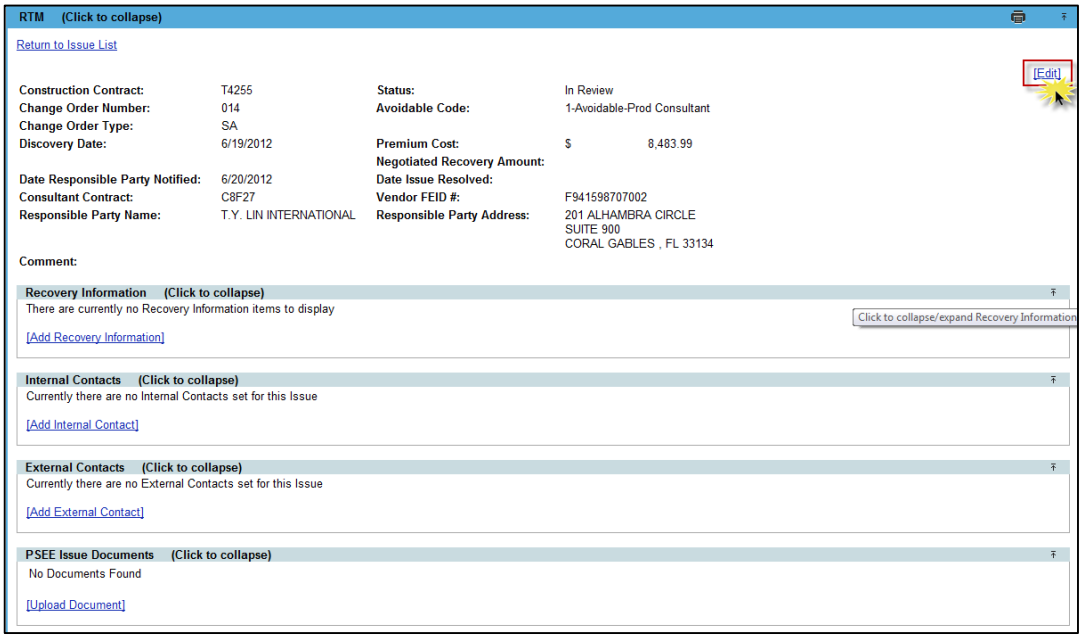
8: Enter any comments related to the issue (Not Required)

Updating E&O Issue

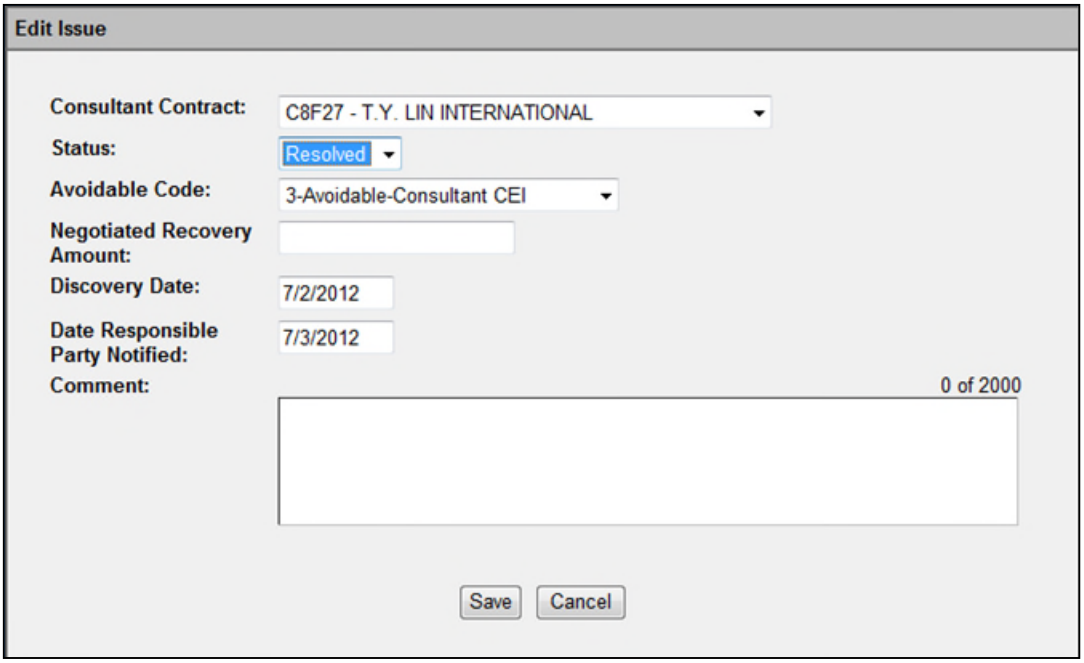
Once an issue has been added/created in RTM, a user with *Manage Issue* privilege can update the issue details for tracking and resolution. From the **List issue** screen, click on **View** to expand the issue details.

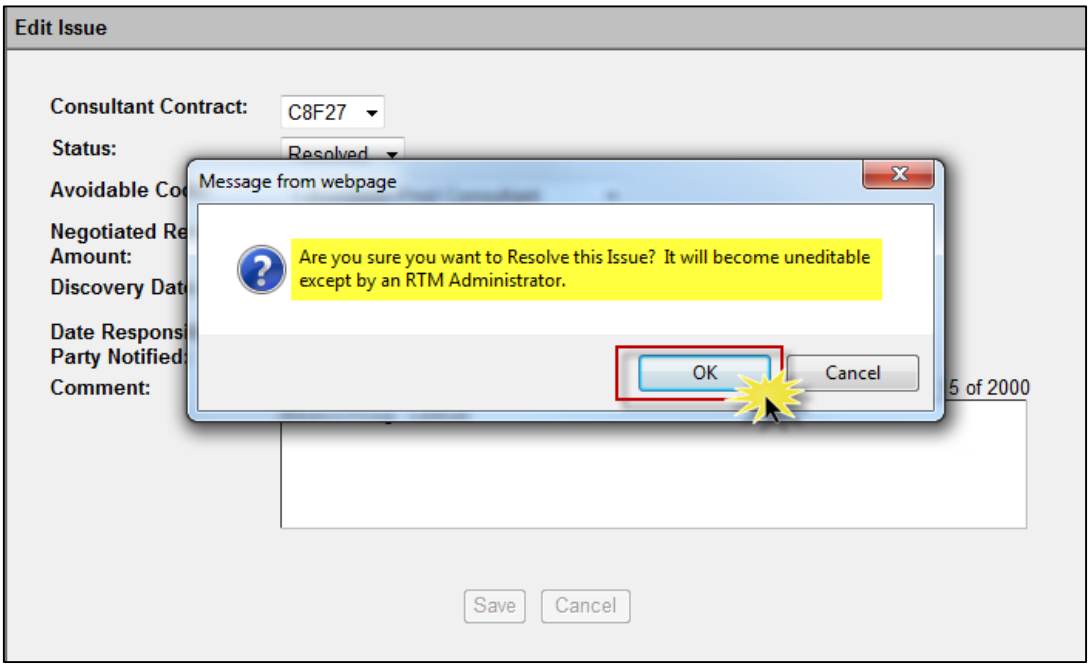


The user can add/update other issue information like managing Amount Recovery Information, Internal/External contacts and Uploading documents from the issue details screen.



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.

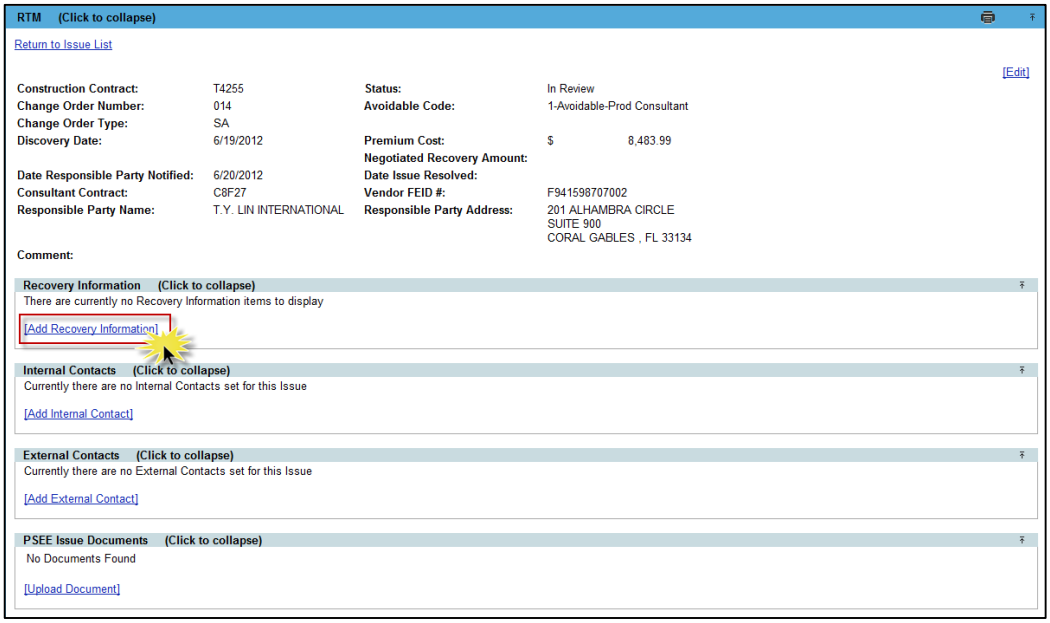




Managing Recovery Information

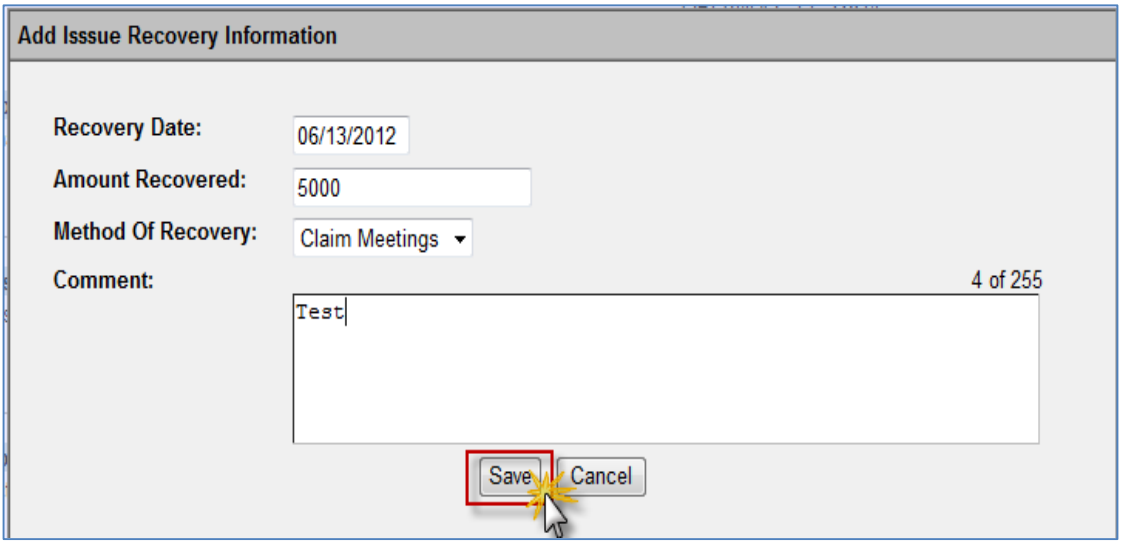
Users can add amount recovery information that is associated with an issue.

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



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.



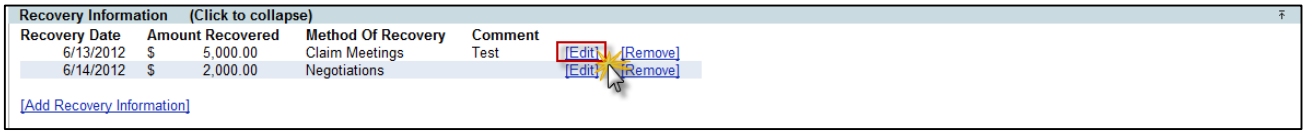
3. Select **Save** when all needed information has been updated or entered.

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

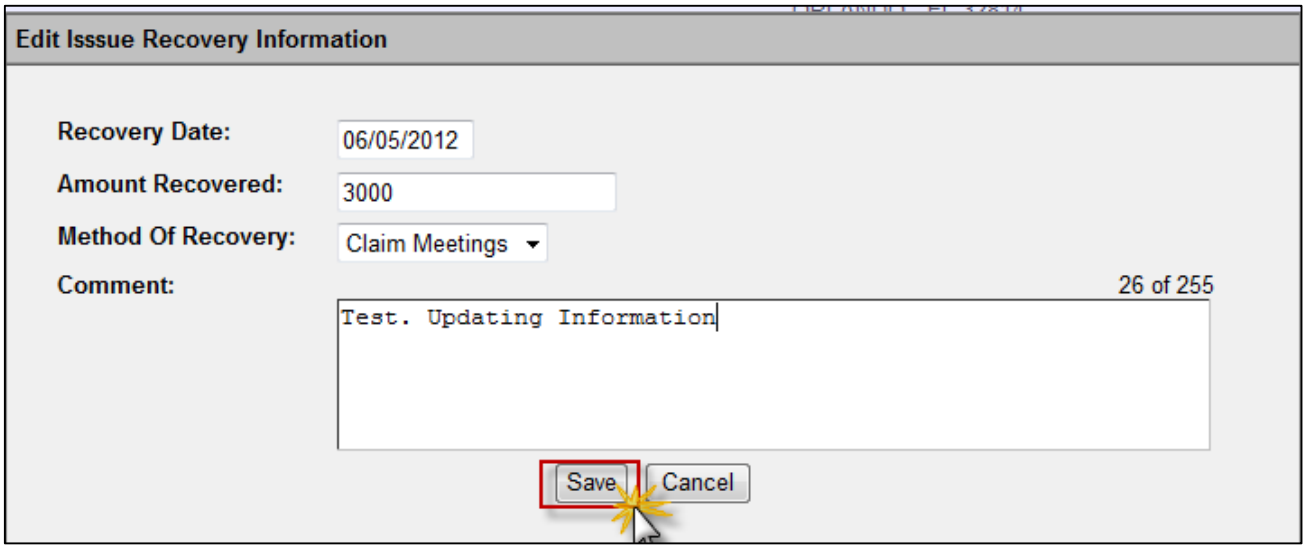
Editing or Removing Recovery Information

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

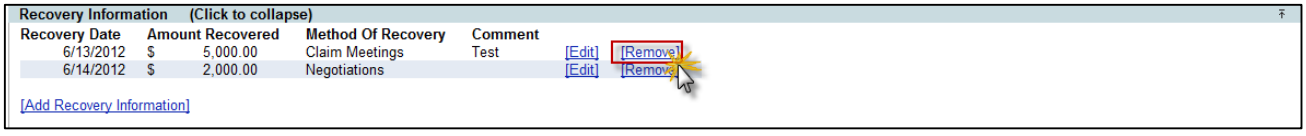
1. To Edit any Recovery Information, select the **Edit** link to the right of their Recovery information.



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



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

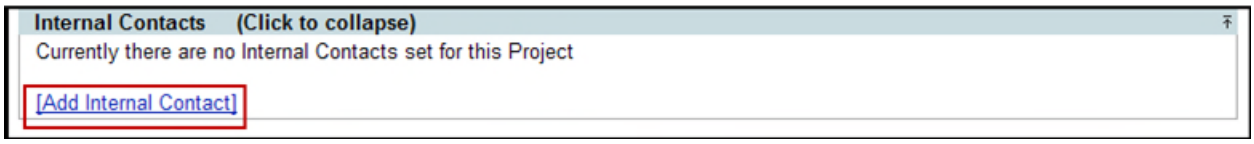


4. A confirmation dialog box will display. Select **OK** to remove the Contact.

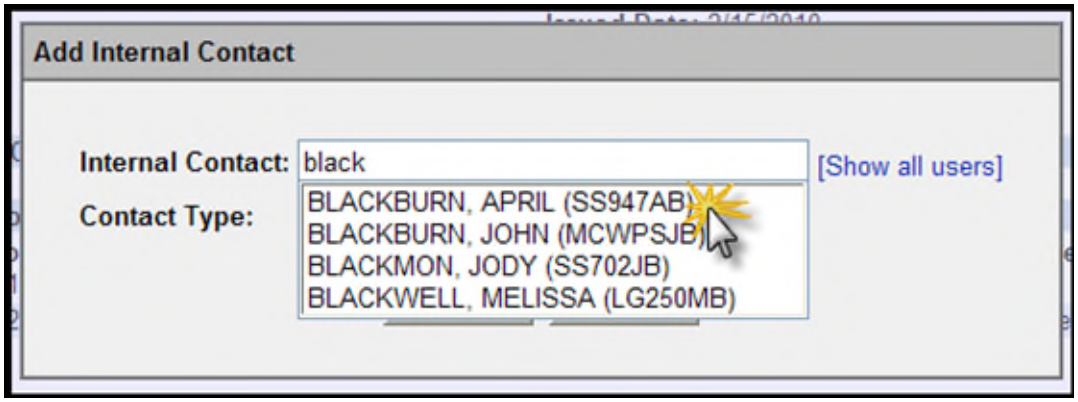
Managing Internal Contacts

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

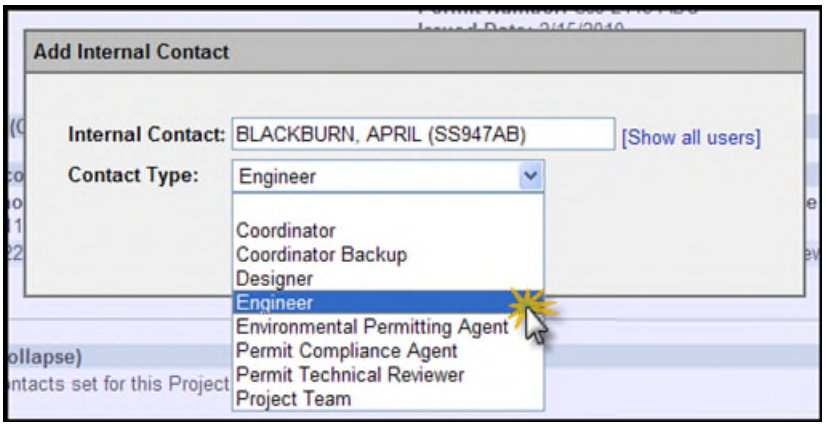
1. From the Internal Contacts section, select the **Add Internal Contact** link.



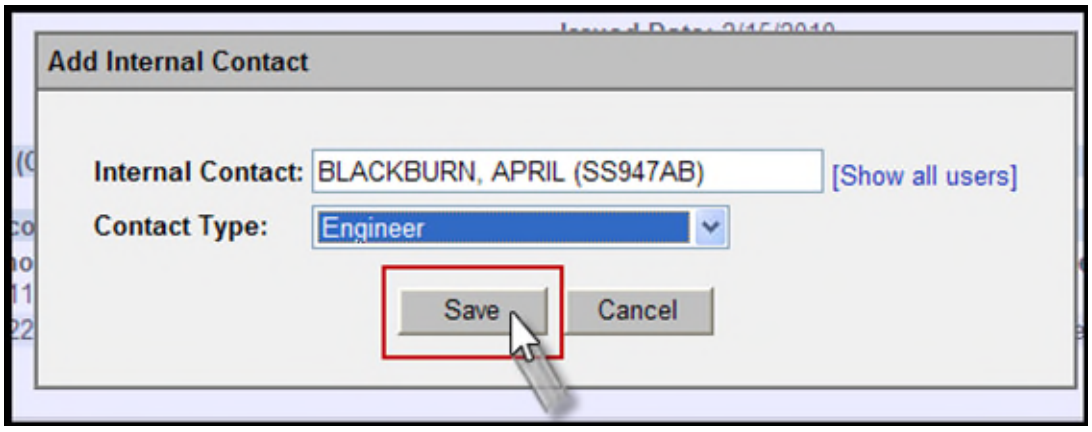
2. In the **Internal Contact** text box, enter the full or partial name of the FDOT staff member and select the required name from the displayed list



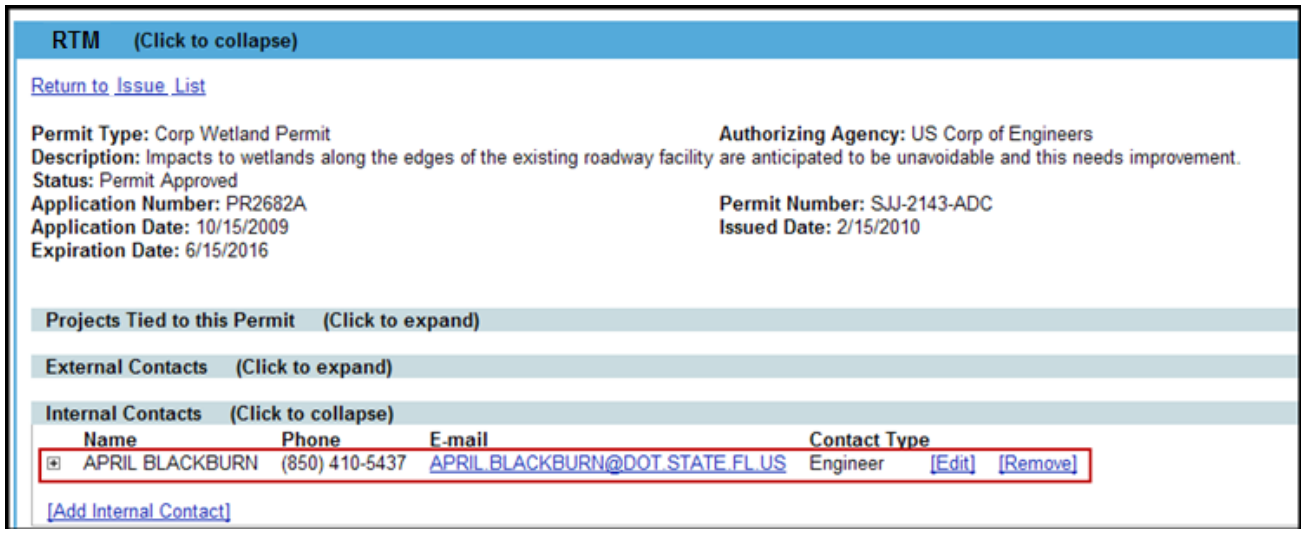
3. Select a required **Contact Type** from the Contact Type drop down



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



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



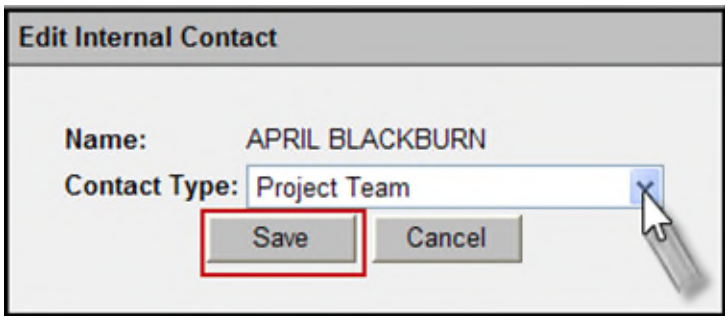
6. To see additional details about this Internal Contact select the plus sign to the left of the Contact Name.

Editing or Removing Internal Contacts

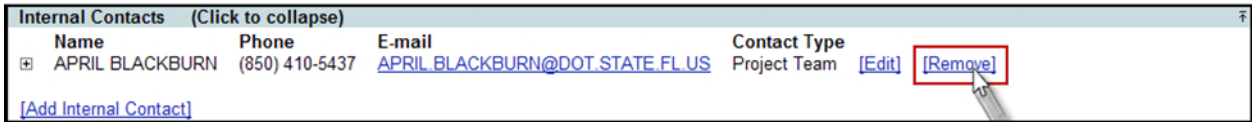
Users may edit or remove information related to Internal Contacts.

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.

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.

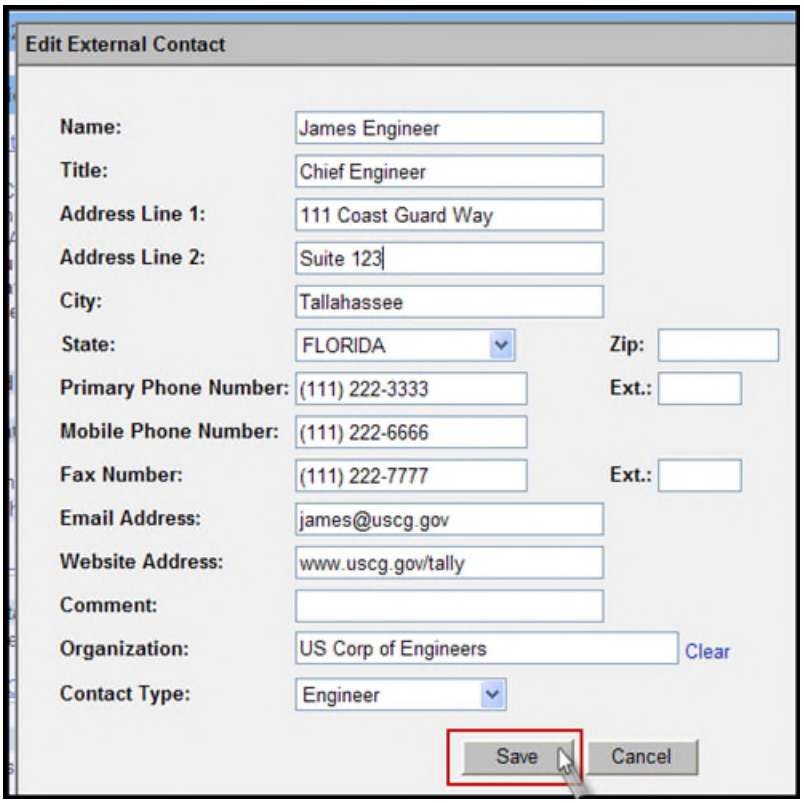
5. The contact will be created and displayed in the External Contact section. Select the plus sign to the left of the contact name to display all of their contact information.

Editing or Removing External Contacts

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

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

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



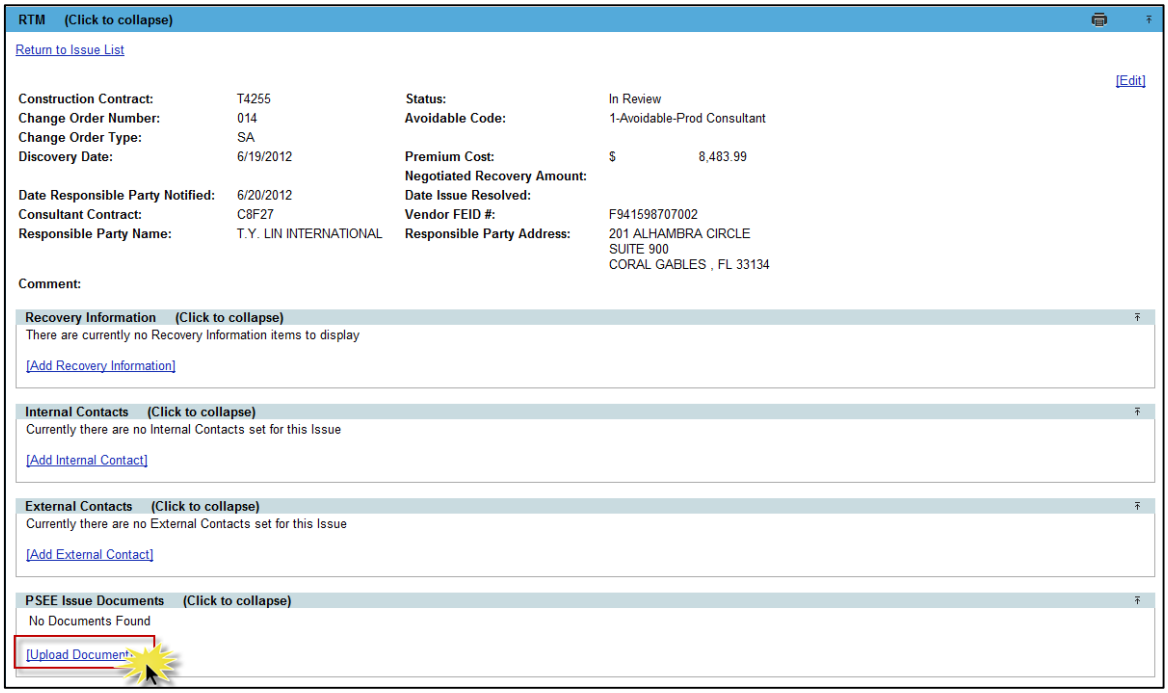
7. To Remove an External Contact, select the **Remove** link to the right of the Contact details.

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

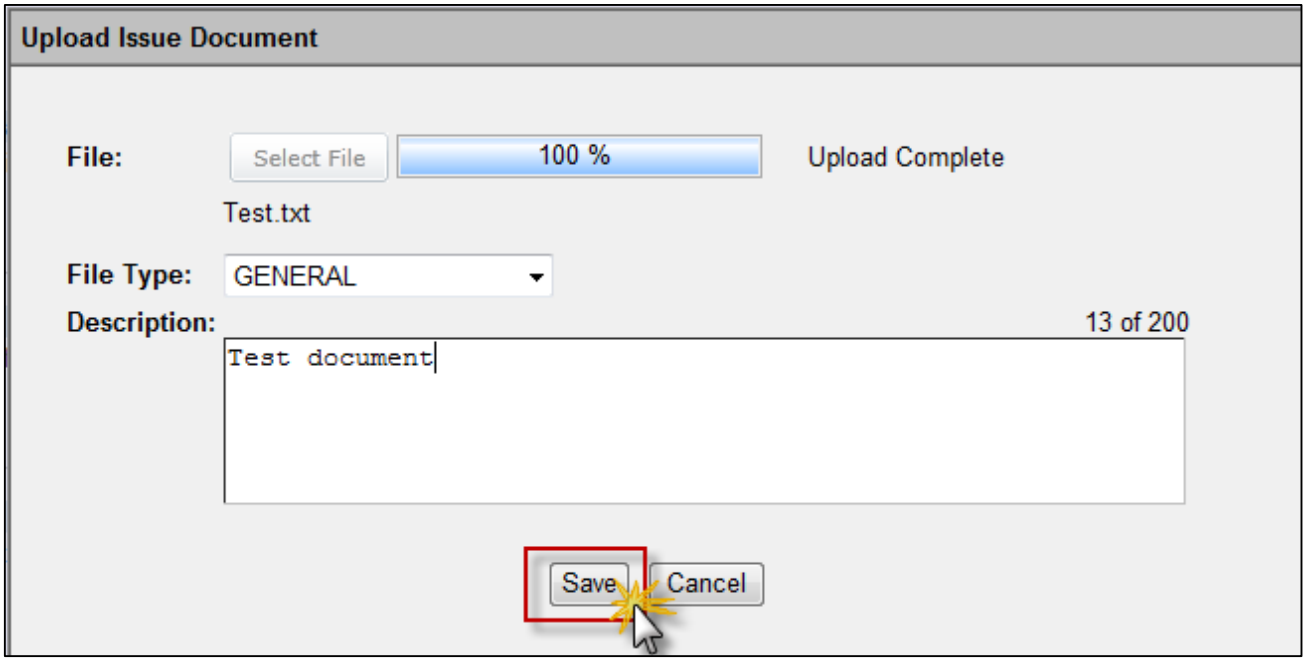
PSEE RTM Documents

Documents can be uploaded that support an Issue.

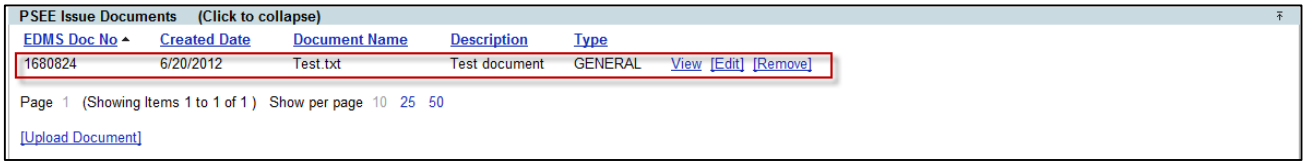
1. From the PSEE Permit Documents section, select the **Upload Document** link to attach a document related to a Permit.



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.

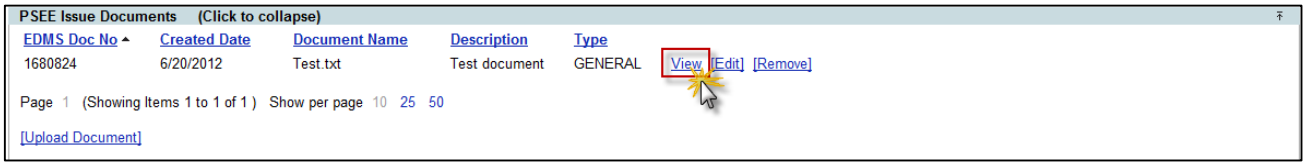


3. The document is now added and listed in the PSEE Permit Documents section.

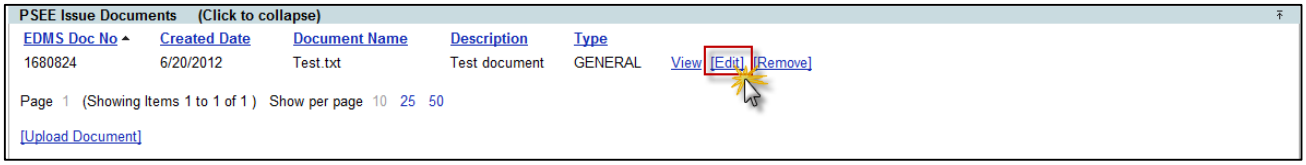


Attached documents can be managed within the Document's details. From there you can View, Edit or Remove the document.

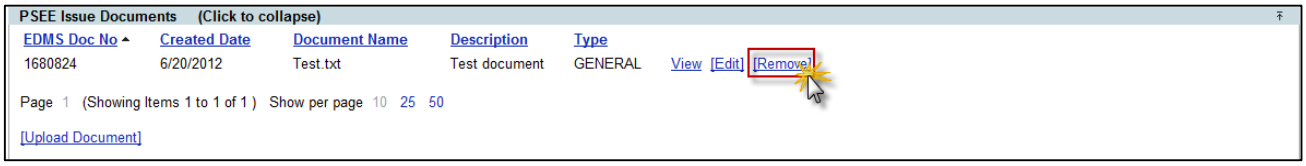
4. Select the **View** link to retrieve the document for display. The document will be opened in its native application.



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



Removing RFI's and E&O Issues

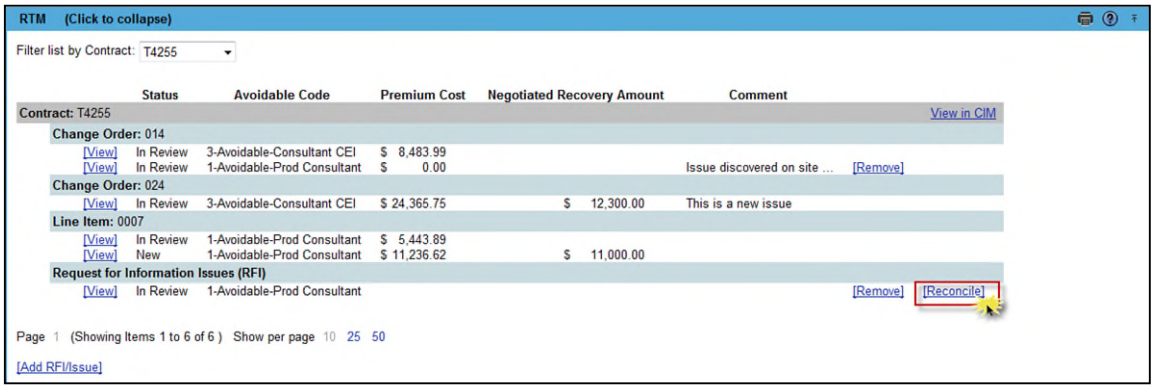
Users with *Manage Issue Admin* privilege can delete any manually created issue. Users with just *Manage Issue* privilege can remove RFI's from RTM at any time. RFI's are not tied to any Change Order or a Line Item can be located at the bottom of the RTM issue list screen.

1. Select the RTM issue/RFI that needs to be removed.

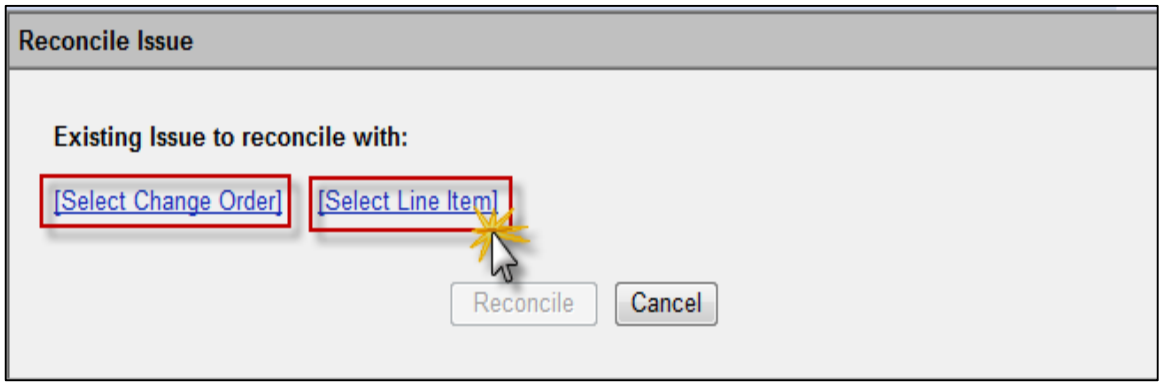
2. Click **Remove**.

Reconciling an RFI.

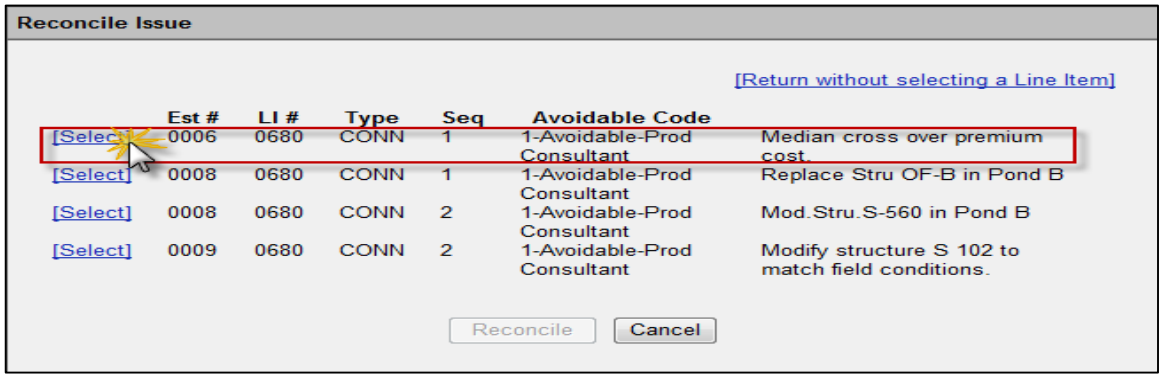
A user with *Manage Issue* privilege can **Reconcile** an RFI. Reconciliation process shall take place for issues that are created manually and do not have a Change Order #/estimate # and Adjustment type associated with it. Once a change order or Line item adjustments against the Initial Contingency 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.



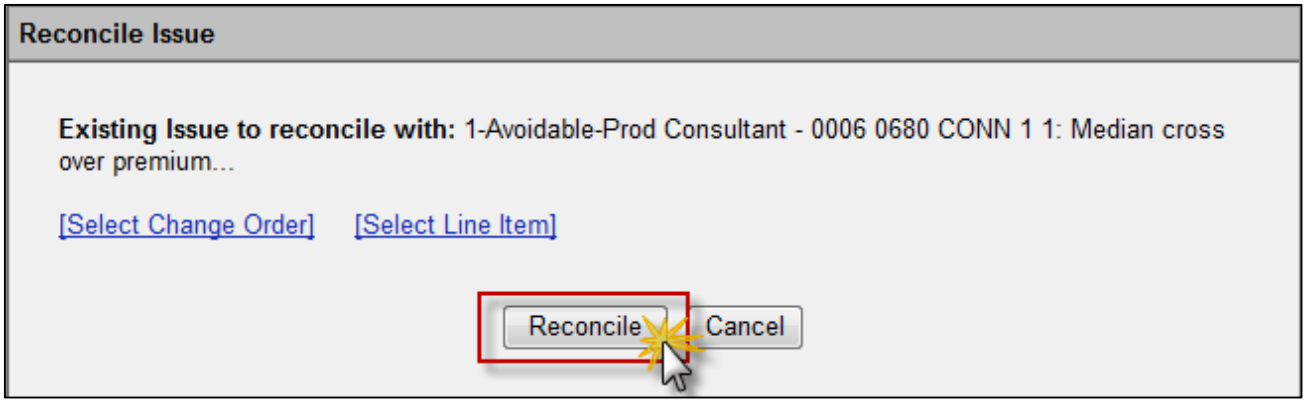
2. A new window appears. Select the **Select Change Order** or **Select Line Item** link to tie the manually created issue with a Change Order or a Line Item Adjustment.

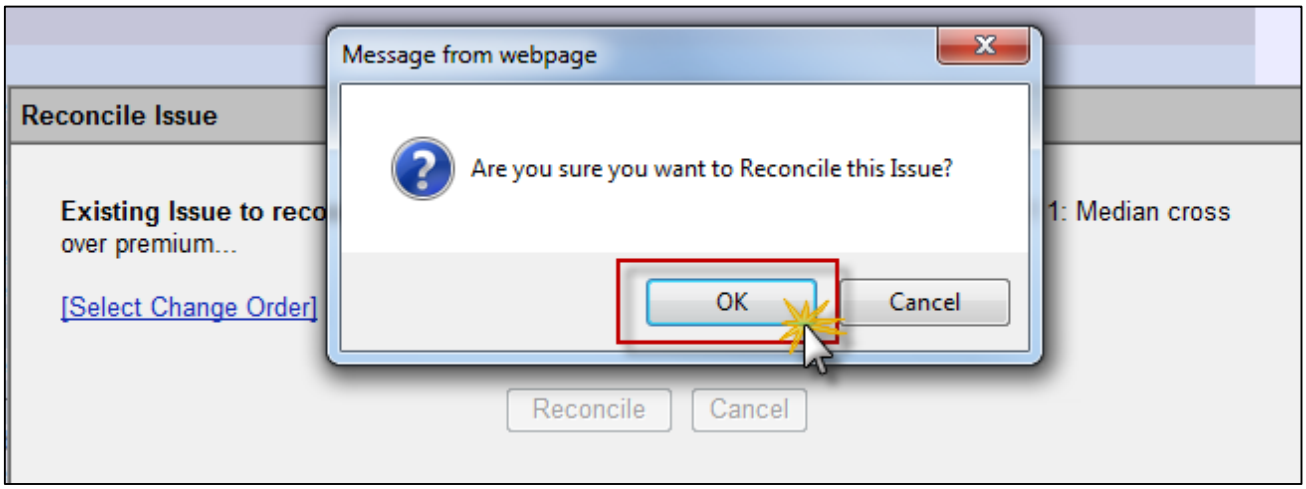
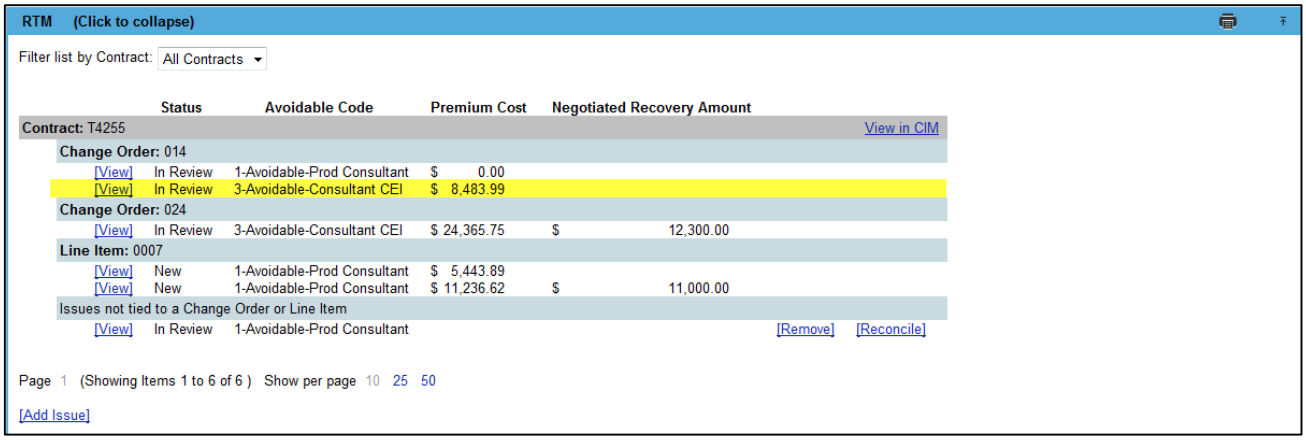


3. A new window appears with all the Line Items available to which the issue can be tied to. Select a Line Item



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





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.