

# The Work Program Change Request Module

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## Requesting Privileges in the Work Program (Includes Phases) Module

As a PSEE User, you may request access/privilege to a specific activity within the Work Program (Includes Phases) 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 Work Program (Includes Phases) 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.

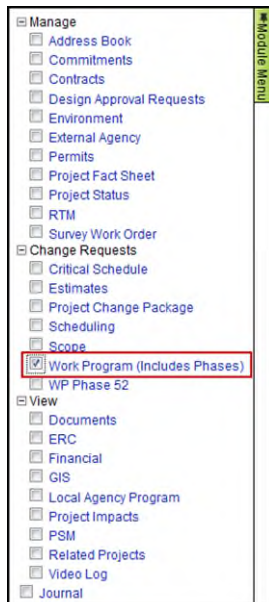
| Request Privileges   |   | D1                       | D2                       | D3                                  | D4                       | D5                       | D6                       | D7                       | TP                       | CO                       |
|--|---|--------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Change Requests  |   |                          |                          |                                     |                          |                          |                          |                          |                          |                          |
| Work Program (Includes Phases)   |   |                          |                          |                                     |                          |                          |                          |                          |                          |                          |
| <input type="checkbox"/>   | Manage Work Program Change Request            | <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"/> |
| <input type="checkbox"/>   | Manage Work Program Change Request 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"/> |
| <input type="checkbox"/>   | Complete Work Program Change Request          | <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.

## The Work Program (Includes Phases) Module

This module allows users to manage WP Change Requests. WP Change Requests are then reviewed by the appropriate staff. Once the Request is approved, the WP Administrator makes the changes in Work Program in the FM system. All supporting documentation for the WP Change Request can be loaded into PSEE.

To initiate a WP Change Request, select the Work Program (Includes Phases) module under Change Requests in the Module Menu. The Work Program (Includes Phases) module will be displayed.




## Creating a WP Change Request

The **Add WP Change Request** hyperlink is displayed to users with access/privilege. The PSEE Project Manager has the access to add a new WP Change Request. Other Users must be granted the *Manage Work Program Change Request* access/privilege.

1. Select the **Add WP Change Request** hyperlink. A new window will appear.



2. Enter the details in the displayed “Add WP Change Request” window.

**Note:**  indicates a required field. The symbol disappears when data is entered or a drop down selection is made.

- **Reason [Required]:** Choose the appropriate Reason Code from the drop down. If Reason Code of “Other” is selected, then a new text box opens, labeled “Other Reason Text” and is also required.

- **Request Description [Required]:** Enter a description of the WP Change Request.

- **Requested By [Required]:** Defaults to the PSEE user initiating the WP Change Request, but can be changed to another internal user.
  - **For Internal Users** begin typing the first and/or last name of the Internal User. A list of matching names will appear. Select the name of the “Requested By” person.

- Change Request Workflow [Optional]:** If the District Administrator has established a Workflow for this Change Request Type, then the available list of Workflows within that District will appear in the drop down and one can be selected. By selecting a Change Request Workflow, the staff defined in this group will have an Assignment generated when the WP Change Request is submitted. Reference the [District Administrators – Managing Change Request Workflow](#) Help Document for more information.

**Note:** If the Change Request Workflow label and field do not display, then there are no established Workflows for this Change Request Type in this District.

**Add WP Change Request**

Reason: Other

Other Reason Text: 76 of 255  
Need to update Project information for possible Federal Grant consideration.

Request Description: 91 of 2000  
Safety improvements for both road and bridge enhancements to warrant Federal Participation.

Requested By: WILLIAM BARBER [Show all users]

Change Request Workflow: With Federal Funds

Save Cancel

- Select **Save** when all information is entered.
- The WP Change Request is displayed. **Note that the WP Change Request is in a Draft Status. The WP Change Request has not been forwarded to reviewers at this point.** You can now edit the request and upload supporting documentation.

Work Program (Includes Phases) (Click to collapse)

[Return to WP Change Request List](#) [Edit] [Submit]

Request Description: Safety improvements for both road and bridge enhancements to warrant Federal Participation.

Reason: Other **Status: Draft**

Other Reason Text: Need to update Project information for possible Federal Grant consideration.

Created Date: 6/22/2012 Submitted Date:

Completed Date:

Requested By: WILLIAM BARBER Completer:

- The top section of the screen includes the information entered when the Request was created. This information can be changed by selecting the **Edit** hyperlink.

Work Program (Includes Phases) (Click to collapse)

[Return to WP Change Request List](#) [Edit] [Submit]

Request Description: Safety improvements for both road and bridge enhancements to warrant Federal Participation.

Reason: Other Status: Draft

Other Reason Text: Need to update Project information for possible Federal Grant consideration.

Created Date: 6/22/2012 Submitted Date:

Completed Date:

Requested By: WILLIAM BARBER Completer:

- 6. Enter changes and click on the Save button.

**Edit WP Change Request**

**Reason:** Other  76 of 255

**Other Reason Text:**

**Request Description:**  199 of 2000

**Requested By:** WILLIAM BARBER

**Change Request Workflow:** With Federal Funds  [New assignments will be appended if available.]

## Review Assignments within the Change Request Workflow

District Administrators must establish Workflows of the Reviewers that will be the default group of Reviewers when a Change Request is created. The Workflows are given a unique name for identification and selection. Several Workflows can be created to be used for the different types of Change Requests. If a Workflow is **not** established by the District Administrators prior to the creation of a Change Request, there will be no Workflow to select. If the Change Request has no Reviewers, it can continue to be processed, but Reviewers will have to be assigned by the Requestor prior to submitting the Change Request. Reference the [District Administrators – Managing Change Request Workflow](#) Help Document for more information on Workflows.

## Review Assignments for the WP Change Request

When a WP Change Request is created and a named Workflow (if available) is selected, the Reviewers in the Workflow are assigned to the WP Change Request. If the Requestor for the Change Request is someone other than the PSEE Project Manager, the PSEE Project Manager will be added at the top of the list of Assigned Reviewers, unless that person already exists in the selected Workflow. The defaulted Reviewer Assignments may be added to or removed from the Change Request while in a status of Draft as appropriate for the specific Change Request.

Review Assignments are used to request a formal review from a User on a WP Data Change Request. Staff with a Review Assignment have a “vote” in the outcome of the Review. The WP Data Change Request cannot be finalized until all Review Assignments have been completed.

**Note:** The **Add Assignment**, **Reorder Assignments**, and **Remove** hyperlinks are displayed to users with the access/privilege. The PSEE Project Manager has access to manage the Assignments. Other Users must be granted the *Manage Work Program Data Request Assignment* access/privilege.

### Adding Additional Assignments

If there is a need for additional Assignments, those can be added after the default assignments are created from the selected Workflow.

1. Select the **Add Assignment** hyperlink. A new window displays.

| Reviewer Assignment (Click to collapse)                                |       |                |         |                          |
|--|-------|----------------|---------|--------------------------|
|  | Order | Reviewer       | Status  | Completed Date           |
| +  | 1     | REGINA BATTLES | Pending | <a href="#">[Remove]</a> |
| +  | 2     | TINA HAGANS    | Pending | <a href="#">[Remove]</a> |
| <a href="#">[Add Assignment]</a> <a href="#">[Reorder Assignments]</a> |       |                |         |                          |

2. Begin typing the first or last name of the Internal User. A list of matching names will appear. A list of potential names will appear. Select the correct person from the list.

**Add WP Change Request Assignment**

Reviewer:  [\[Show all users\]](#)

CASTELLS, DUSTIN (WP364DC)

3. Select **Save**. The new Reviewer Assignment will display.

| Reviewer Assignment (Click to collapse) |       |                 |         |                          |
|---|-------|-----------------|---------|--------------------------|
|   | Order | Reviewer        | Status  | Completed Date           |
| +                                       | 1     | REGINA BATTLES  | Pending | <a href="#">[Remove]</a> |
| +                                       | 2     | TINA HAGANS     | Pending | <a href="#">[Remove]</a> |
| +                                       | 3     | DUSTIN CASTELLS | Pending | <a href="#">[Remove]</a> |

[\[Add Assignment\]](#) [\[Reorder Assignments\]](#)

### Reordering Reviewer Assignments

When there are two or more Reviewer Assignments, the Assignments can be reordered. The order of the Reviewers will establish the order in which they review the WP Change Request. The first Reviewer will receive notification to begin reviewing when the Change Request is submitted.

1. Click on the **Reorder Assignments** hyperlink.

| Reviewer Assignment (Click to collapse) |       |                 |         |                          |
|---|-------|-----------------|---------|--------------------------|
|   | Order | Reviewer        | Status  | Completed Date           |
| +                                       | 1     | REGINA BATTLES  | Pending | <a href="#">[Remove]</a> |
| +                                       | 2     | TINA HAGANS     | Pending | <a href="#">[Remove]</a> |
| +                                       | 3     | DUSTIN CASTELLS | Pending | <a href="#">[Remove]</a> |

[\[Add Assignment\]](#) [\[Reorder Assignments\]](#)

2. Select a name and click on Move Up or Move Down. Select **Save** when order is correct.

**Reorder WP Change Request Assignment**

REGINA BATTLES  
 DUSTIN CASTELLS  
 TINA HAGANS

[Move Up](#)  
[Move Down](#)

3. The updates are saved.

| Reviewer Assignment (Click to collapse) |       |                 |         |                          |
|---|-------|-----------------|---------|--------------------------|
|   | Order | Reviewer        | Status  | Completed Date           |
| <input type="checkbox"/>                | 1     | REGINA BATTLES  | Pending | <a href="#">[Remove]</a> |
| <input type="checkbox"/>                | 2     | DUSTIN CASTELLS | Pending | <a href="#">[Remove]</a> |
| <input type="checkbox"/>                | 3     | TINA HAGANS     | Pending | <a href="#">[Remove]</a> |

[\[Add Assignment\]](#) [\[Reorder Assignments\]](#)


### Removing Reviewer Assignments

A Reviewer Assignment can be removed, if it determined that the Reviewer does not need to participate in the review of this Change Request.

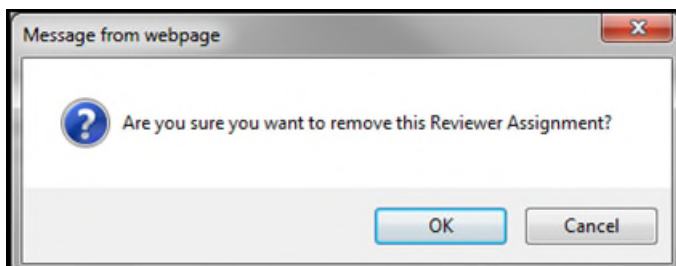
1. Click on the Remove link beside the Reviewer's name.

| Reviewer Assignment (Click to collapse) |       |                 |         |                          |
|---|-------|-----------------|---------|--------------------------|
|   | Order | Reviewer        | Status  | Completed Date           |
| <input type="checkbox"/>                | 1     | REGINA BATTLES  | Pending | <a href="#">[Remove]</a> |
| <input type="checkbox"/>                | 2     | DUSTIN CASTELLS | Pending | <a href="#">[Remove]</a> |
| <input type="checkbox"/>                | 3     | TINA HAGANS     | Pending | <a href="#">[Remove]</a> |

[\[Add Assignment\]](#) [\[Reorder Assignments\]](#)



2. Click OK to confirm the removal of the Reviewer.



3. The Reviewer Assignment is removed.

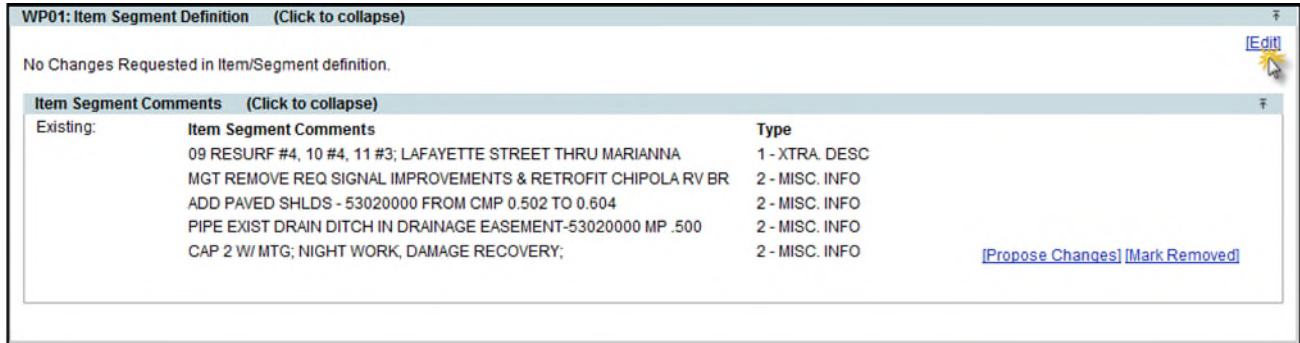
| Reviewer Assignment (Click to collapse) |       |                 |         |                          |
|---|-------|-----------------|---------|--------------------------|
|   | Order | Reviewer        | Status  | Completed Date           |
| <input type="checkbox"/>                | 1     | REGINA BATTLES  | Pending | <a href="#">[Remove]</a> |
| <input type="checkbox"/>                | 2     | DUSTIN CASTELLS | Pending | <a href="#">[Remove]</a> |

[\[Add Assignment\]](#) [\[Reorder Assignments\]](#)

### WP01: Item Segment Definition

Below the Reviewer Assignment section is the WP01: Item Segment Definition section.

1. Click on the **Edit** hyperlink to make a Item Segment Definition change in the WP Change Request.



2. The **Edit Item Segment Definition** window is populated with the WP01 information as currently exists in FM.

**Edit Item Segment Definition**

Box Code:

Contract Type:

Managing District:

Geographic District:  County:

Item Segment Description:

Transportation System:

Version:

Work Mix:

WP Project Manager:

[Save] [Cancel]

3. Edit as appropriate and click on the **Save** button.
4. Information which has been changed is now displayed.

### Edit of Item Segment Comments

Included in the WP01:Item Segment Definition section is the Item Segment Comments section.

1. Click on the **Propose Changes** hyperlink.



2. Edit individual lines as appropriate and click on the **Save** button.

**Propose Item Segment Comment Change**

|  |                |
|--|----------------|
| 09 RESURF #4, 10 #4, 11 #3; LAFAYETTE STREET THRU MARIANNA   | 1 - XTRA. DESC |
| MGT REMOVE REQ SIGNAL IMPROVEMENTS & RETROFIT CHIPOLA RV BR  | 2 - MISC. INFO |
| ADD PAVED SHLDS - 53020000 FROM CMP 0.502 TO 0.604           | 2 - MISC. INFO |
| PIPE EXIST DRAIN DITCH IN DRAINAGE EASEMENT-53020000 MP .500 | 2 - MISC. INFO |
| CAP 2 W/ MTG; NIGHT WORK, DAMAGE RECOVERY;                   | 2 - MISC. INFO |
| <input style="width: 100%;" type="text"/>                    | 2 - MISC. INFO |

3. If all Item Segment Comments are to be removed, click on the **Mark Removed** hyperlink.

WP01: Item Segment Definition (Click to collapse) [Edit]

No Changes Requested in Item/Segment definition.

**Item Segment Comments** (Click to collapse)

| Existing: | Item Segment Comments  | Type           |
|-----------|--|----------------|
|           | 09 RESURF #4, 10 #4, 11 #3; LAFAYETTE STREET THRU MARIANNA   | 1 - XTRA. DESC |
|           | MGT REMOVE REQ SIGNAL IMPROVEMENTS & RETROFIT CHIPOLA RV BR  | 2 - MISC. INFO |
|           | ADD PAVED SHLDS - 53020000 FROM CMP 0.502 TO 0.604           | 2 - MISC. INFO |
|           | PIPE EXIST DRAIN DITCH IN DRAINAGE EASEMENT-53020000 MP .500 | 2 - MISC. INFO |
|           | CAP 2 W/ MTG; NIGHT WORK, DAMAGE RECOVERY;                   | 2 - MISC. INFO |

[\[Propose Changes\]](#) [\[Mark Removed\]](#)

4. All Item Segment Comments are marked to be removed.

**Item Segment Comments** (Click to collapse)

| Existing: | Item Segment Comments  | Type           |
|-----------|--|----------------|
|           | 09 RESURF #4, 10 #4, 11 #3; LAFAYETTE STREET THRU MARIANNA   | 1 - XTRA. DESC |
|           | MGT REMOVE REQ SIGNAL IMPROVEMENTS & RETROFIT CHIPOLA RV BR  | 2 - MISC. INFO |
|           | ADD PAVED SHLDS - 53020000 FROM CMP 0.502 TO 0.604           | 2 - MISC. INFO |
|           | PIPE EXIST DRAIN DITCH IN DRAINAGE EASEMENT-53020000 MP .500 | 2 - MISC. INFO |
|           | CAP 2 W/ MTG; NIGHT WORK, DAMAGE RECOVERY;                   | 2 - MISC. INFO |
|           | *** All available comments marked as removed                 |                |

[\[Unmark Removed\]](#)

5. Click on the **Unmark Removed** hyperlink to indicate that Item Segment Comments should **not** be marked for removal.

### WP03: Item Segment Group

The WP03: Item Segment Group allows for requests to add or remove Item Segment Groups.

1. Click on the **Add Item Segment Group** hyperlink to request the association of a new Item Segment Group to this project.

WP03: Item Segment Group (Click to collapse) [Edit]

| Existing: | Group | Description                   |                                |
|-----------|-------|-------------------------------|--------------------------------|
|           | REDI  | Rural Econom Devel Initiative | <a href="#">[Mark Removed]</a> |
|           | 30DA  | 30 Day Advertisement          | <a href="#">[Mark Removed]</a> |

[\[Add Item Segment Group\]](#)

2. Select an Item Segment Group from the drop down and click on Save.

3. The Item Segment Group is added as a New Item Segment Group within the section.

| WP03: Item Segment Group (Click to collapse) |       |                               |                                |
|--|-------|-------------------------------|--------------------------------|
|  | Group | Description                   |                                |
| Existing:                                    | REDI  | Rural Econom Devel Initiative | <a href="#">[Mark Removed]</a> |
| Existing:                                    | 30DA  | 30 Day Advertisement          | <a href="#">[Mark Removed]</a> |
| New:   | PBC   | Performance Based Contracting | <a href="#">[Remove]</a>       |

[\[Add Item Segment Group\]](#)

4. Select the Remove hyperlink beside any new Item Segment Group to remove it from the WP Change Request.

| WP03: Item Segment Group (Click to collapse) |       |                               |                                |
|--|-------|-------------------------------|--------------------------------|
|  | Group | Description                   |                                |
| Existing:                                    | REDI  | Rural Econom Devel Initiative | <a href="#">[Mark Removed]</a> |
| Existing:                                    | 30DA  | 30 Day Advertisement          | <a href="#">[Mark Removed]</a> |
| New:   | PBC   | Performance Based Contracting | <a href="#">[Remove]</a>       |

[\[Add Item Segment Group\]](#)

5. Click OK to confirm removal from the WP Change Request.

6. The Item Segment Group is no longer part of the WP Change Request.

### **Requesting the Removal of Existing Item Segment Groups**

1. Click on the **Mark Removed** hyperlink to propose the removal of an Item Segment Group associated to the project.

| WP03: Item Segment Group (Click to collapse) |       |                               |                                |
|--|-------|-------------------------------|--------------------------------|
|  | Group | Description                   |                                |
| Existing:                                    | REDI  | Rural Econom Devel Initiative | <a href="#">[Mark Removed]</a> |
| Existing:                                    | 30DA  | 30 Day Advertisement          | <a href="#">[Mark Removed]</a> |

[\[Add Item Segment Group\]](#)

2. The Item Segment Group is marked to be removed in the WP Change Request.

| WP03: Item Segment Group (Click to collapse) |       |                               |                                  |
|--|-------|-------------------------------|----------------------------------|
|  | Group | Description                   |                                  |
| Existing:                                    | REDI  | Rural Econom Devel Initiative | <a href="#">[Mark Removed]</a>   |
| Existing:                                    | 30DA  | 30 Day Advertisement          | <a href="#">[Unmark Removed]</a> |

[\[Add Item Segment Group\]](#)

3. Click on the **Unmark Removed** hyperlink to indicate that the Item Segment Group should **not** be marked for removal.

### WP07: Item Segment Location – Road

The WP07: Item Segment Location-Road allows for requests to add or remove new Roads to the project.

1. Click on the **Add Road** hyperlink to request the addition of a new Road to this Project.

| WP07: Item Segment Location - Road <small>(Click to collapse)</small> |                    |                 |              |               |                |             |                         |  |
|---|--------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|--|
|   | Roadway ID         | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |  |
| <input type="checkbox"/>  | Existing: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53010000 | 11.878          | 13.58        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53010000 | 13.58           | 14.022       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53010000 | 14.022          | 14.076       | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53020000 | 0               | 0.068        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53020000 | 0.068           | 0.182        | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53020000 | 0.182           | 0.604        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |

[Add Road](#)

2. Select a Roadway ID from the drop down and enter the Beginning Milepoint and Ending Milepoint. These are required fields. The other fields are optional. Click on Save.

**Add Item Segment Location - ROADWAY**

Roadway ID:

Beginning Point:

Ending Point:

Roadway Side:

Lanes Improved:


Lanes Added:

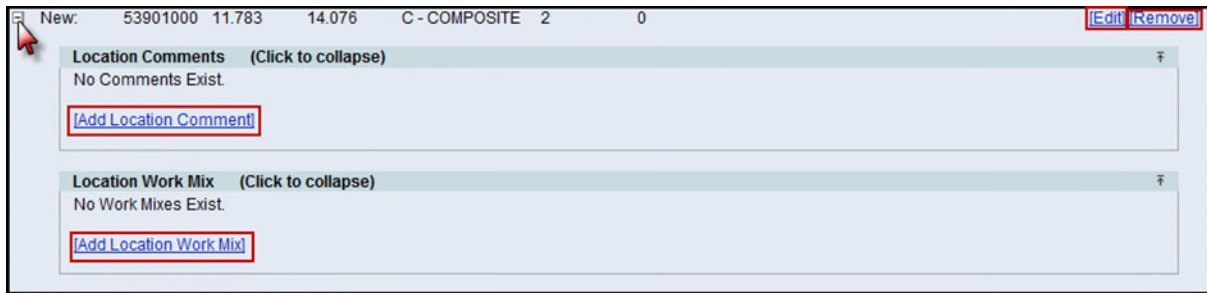
Proposed Cross Section:

3. The Roadway ID is added as a new Item Segment Location-Road.

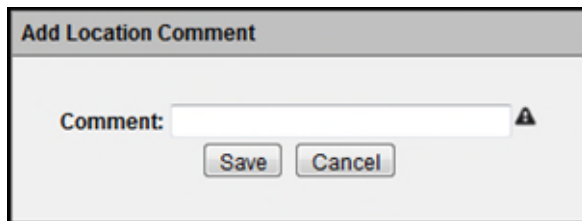
| WP07: Item Segment Location - Road <small>(Click to collapse)</small> |                    |                 |              |               |                |             |                         |  |
|---|--------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|--|
|   | Roadway ID         | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |  |
| <input type="checkbox"/>  | Existing: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53010000 | 11.878          | 13.58        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53010000 | 13.58           | 14.022       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53010000 | 14.022          | 14.076       | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53020000 | 0               | 0.068        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53020000 | 0.068           | 0.182        | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | Existing: 53020000 | 0.182           | 0.604        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>  | New: 53901000      | 11.783          | 14.076       | C - COMPOSITE | 0              | 0           |                         | <a href="#">[Edit]</a> <a href="#">[Remove]</a>                  |

[Add Road](#)

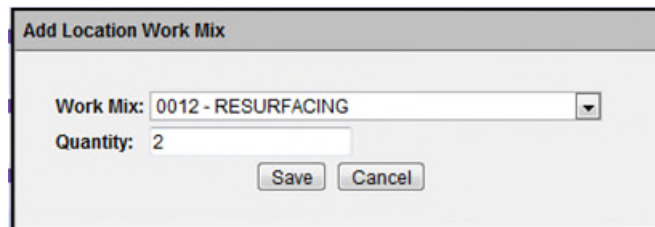
- Click on the  beside the New Roadway ID to expand the Location Comments and Location Work Mix sections.



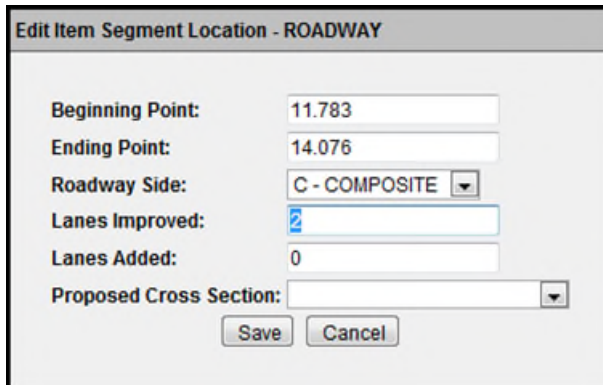
- Click on Add Location Comment hyperlink to add Comments specific to the section of Roadway.



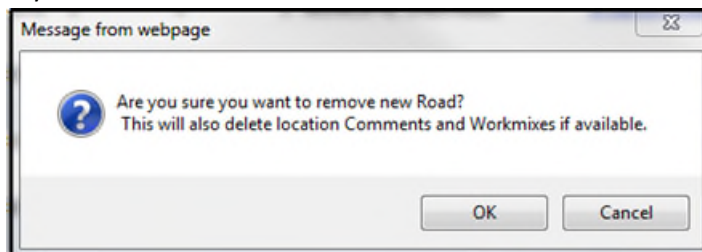
- Click on Add Location Work Mix hyperlink to add Work Mixes specific to the section of Roadway.



- Select the **Edit** hyperlink beside the new Roadway ID to edit the information in the WP Change Request.



- If the new Roadway ID is not to be a part of the WP Change Request, select the **Remove** hyperlink beside the new Roadway ID. Click on OK to confirm the removal of the new Road. This will also remove any Location Comments and Location Work Mixes.



### Requesting changes to Existing Item Segment Location

**NOTE:** This section will be explained using the Item Segment Location – Road, but will be referenced for help on requesting changes to any *Existing* Item Segment Location (Road, Airport, Seaport, and Transit System). Item Segment Location - Bridge is unique and will be explained in the Item Segment Location – Bridge.

1. Click on the **Propose Changes** hyperlink.

| WP07: Item Segment Location - Road (Click to collapse) |                    |                 |              |               |                |             |                         |  |
|--|--------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|--|
|  | Roadway ID         | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |  |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | Existing: 53010000 | 11.878          | 13.58        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | Existing: 53010000 | 13.58           | 14.022       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | Existing: 53010000 | 14.022          | 14.076       | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | Existing: 53020000 | 0               | 0.068        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | Existing: 53020000 | 0.068           | 0.182        | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | Existing: 53020000 | 0.182           | 0.604        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |
| <input type="checkbox"/>                               | New: 53901000      | 11.783          | 14.076       | C - COMPOSITE | 0              | 0           | 3 - MUNICIPAL           | <a href="#">[Edit]</a> <a href="#">[Remove]</a>                  |

[\[Add Road\]](#)

2. Edit individual fields as appropriate and click on the **Save** button.

**Propose Changes to Item Segment Location - ROADWAY**

Beginning Point:

Ending Point:

Roadway Side:

Lanes Improved:

Lanes Added:

Proposed Cross Section:

3. The Proposed Changes are displayed below the Existing Changes.

| WP07: Item Segment Location - Road (Click to collapse) |                    |                 |              |               |                |             |                         |   |
|--|--------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|---|
|  | Roadway ID         | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |   |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED |   |
|  | Proposed: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Edit]</a> <a href="#">[Remove]</a> |

4. Click on the  beside the existing Item Segment Location (Roadway ID) to expand any *existing* Location Comments and Location Work Mix sections for this Item Segment Location.

| WP07: Item Segment Location - Road (Click to collapse) |                    |  |              |               |                |             |                         |  |  |
|--|--------------------|--|--------------|---------------|----------------|-------------|-------------------------|--|--|
|  | Roadway ID         | Beginning Point  | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |  |  |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 11.783   | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED |  |  |
|  | Proposed: 53010000 | 11.783   | 11.878       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED | <a href="#">[Edit]</a> <a href="#">[Remove]</a>                  |  |
| <b>Location Comments (Click to collapse)</b>           |                    |  |              |               |                |             |                         |  |  |
|  | Existing:          | 09-2010:BEGIN MP CHNG'D FROM 11.758 TO 11.783 PER K. HARRELL |              |               |                |             |                         | <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |  |
| <a href="#">[Add Location Comment]</a>                 |                    |  |              |               |                |             |                         |  |  |
| <b>Location Work Mix (Click to collapse)</b>           |                    |  |              |               |                |             |                         |  |  |
| No Work Mixes Exist                                    |                    |  |              |               |                |             |                         |  |  |
| <a href="#">[Add Location Work Mix]</a>                |                    |  |              |               |                |             |                         |  |  |

• **Location Comments**

| Location Comments (Click to collapse)                            |   |
|--|---|
| Existing:  | 09-2010:BEGIN MP CHNG'D FROM 11.758 TO 11.783 PER K.<br>HARRELL |
| <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |   |
| <a href="#">[Add Location Comment]</a>                           |   |

- Click on **Add Location Comment** hyperlink to add additional Comments specific to the *proposed* Item Segment Location. Click on Save. *New* Location Comments appear above Existing Location Comments.

| Location Comments (Click to collapse)                            |   |
|--|---|
| New:   | Make the TO MP 11.878   |
| Existing:  | 09-2010:BEGIN MP CHNG'D FROM 11.758 TO 11.783 PER K.<br>HARRELL |
| <a href="#">[Edit]</a> <a href="#">[Remove]</a>                  |   |
| <a href="#">[Propose Changes]</a> <a href="#">[Mark Removed]</a> |   |
| <a href="#">[Add Location Comment]</a>                           |   |

- Click on **Edit** to amend the new Location Comments.
  - Click on **Remove** to delete the new Location Comments.
- Click on the **Propose Changes** hyperlink to edit the *existing* Location Comments.

**Propose Location Comment Change**

Comment: 09-2010:BEGIN MP CHNG'D FROM

- Click on the **Mark Removed** hyperlink to propose the removal of Location Comments for the *existing* Item Segment Location (Roadway ID).

| Location Comments (Click to collapse)   |   |
|---|---|
| New:  | Make the TO MP 11.878   |
| Existing:   | 09-2010:BEGIN MP CHNG'D FROM 11.758 TO 11.783 PER K.<br>HARRELL |
| <a href="#">[Edit]</a> <a href="#">[Remove]</a>                                 |   |
| <span style="border: 1px solid red; padding: 2px;">*** Marked as Removed</span> |   |
| <a href="#">[Unmark Removed]</a>  |   |
| <a href="#">[Add Location Comment]</a>  |   |

- If the *existing* Location Comments for this Item Segment Location (Roadway ID) should **not** be marked for removal, click on the **Unmark Removed** hyperlink to undo.

• **Location Work Mix**

| Location Work Mix (Click to collapse)   |  |
|---|--|
| No Work Mixes Exist                     |  |
| <a href="#">[Add Location Work Mix]</a> |  |

- Click on the **Add Location Work Mix**, fill in the fields as necessary, then click on Save.

**Add Location Work Mix**

Work Mix:

Quantity:

- The new Location Work Mix for this *proposed* Item Segment Location (Roadway ID) is added to the Project.

| Location Work Mix (Click to collapse)           |                                    |   |
|---|------------------------------------|---|
| Work Mix:                                       | Quantity:                          |   |
| New:  | 0046 - ENVIRONMENTAL TEST/MITIGATE | 1 |
| <a href="#">[Edit]</a> <a href="#">[Remove]</a> |                                    |   |
| <a href="#">[Add Location Work Mix]</a>         |                                    |   |

- Click on **Edit** to amend the new Location Work Mix.
  - Click on **Remove** to delete the new Location Work Mix.

- o If there is an *existing* Work Mix, the **Propose Change**, **Mark Removed** and **Unmark Removed** hyperlinks will be displayed.

5. Click on the **Edit** hyperlink to make additional updates to the *proposed* Item Segment Location (Roadway ID) information.

| WP07: Item Segment Location - Road (Click to collapse) |                    |                 |              |               |                |             |                         |
|--|--------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|
|  | Roadway ID         | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED |
|  | Proposed: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED |

6. The *proposed* Item Segment Location (Roadway ID) is displayed for editing. Click on the Save button after entering updates.

**Edit Item Segment Location - ROADWAY**

Beginning Point:

Ending Point:

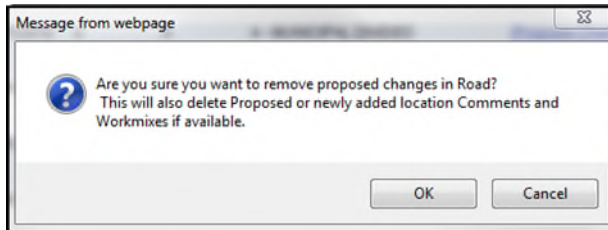
Roadway Side:

Lanes Improved:

Lanes Added:

Proposed Cross Section:

7. If the *proposed* Item Segment Location (Roadway ID) information is **not** to be a part of the WP Change Request, select the **Remove** hyperlink beside the proposed Roadway ID row. Click on OK to confirm the removal of the proposed Item Segment Location (Roadway ID) information. This will also remove any Location Comments and Location Work Mixes.



8. Click on the **Mark Removed** hyperlink to propose the removal of an *existing* Item Segment Location (Roadway ID).

| WP07: Item Segment Location - Road (Click to collapse) |                    |                 |              |               |                |             |                         |
|--|--------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|
|  | Roadway ID         | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 11.878          | 13.58        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 13.58           | 14.022       | C - COMPOSITE | 4              | 0           | 3 - MUNICIPAL UNDIVIDED |
| <input checked="" type="checkbox"/>                    | Existing: 53010000 | 14.022          | 14.076       | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   |

9. The *existing* Item Segment Location (Roadway ID) displays '\*\*\*Marked as Removed.' This removes any existing or new Location Comments and Location Work Mixes associated to this section of Roadway.

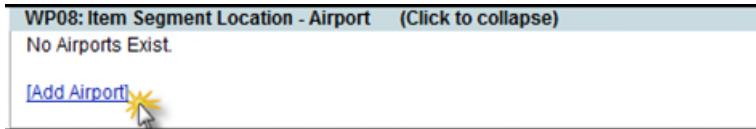
| WP07: Item Segment Location - Road (Click to collapse) |                       |                 |              |               |                |             |                         |
|--|-----------------------|-----------------|--------------|---------------|----------------|-------------|-------------------------|
|  | Roadway ID            | Beginning Point | Ending Point | Roadway Side  | Lanes Improved | Lanes Added | Proposed Cross Section  |
| <input checked="" type="checkbox"/>                    | Existing: 53010000    | 11.783          | 11.878       | C - COMPOSITE | 2              | 0           | 3 - MUNICIPAL UNDIVIDED |
|  | *** Marked as Removed |                 |              |               |                |             |                         |
| <input checked="" type="checkbox"/>                    | Existing: 53010000    | 11.878          | 13.58        | C - COMPOSITE | 4              | 0           | 4 - MUNICIPAL DIVIDED   |

10. If the *existing* Item Segment Location (Roadway ID) should **not** be marked for removal, click on the **Unmark Removed** hyperlink to undo.

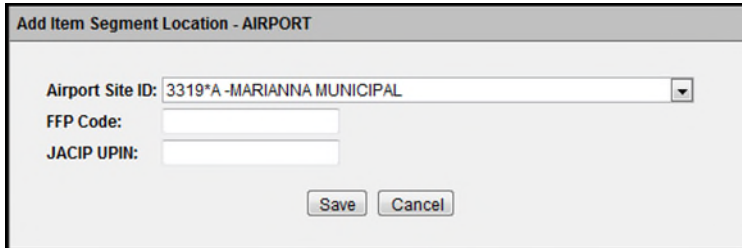
### WP08: Item Segment Location – Airport

The WP08: Item Segment Location-Airport allows for requests to add or remove new Airports to the project.

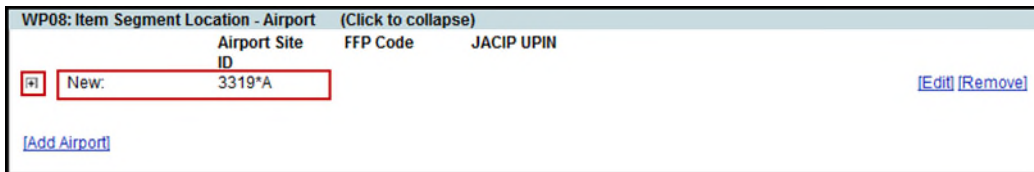
1. Click on the **Add Airport** hyperlink to request the add of a new Airport to this project.




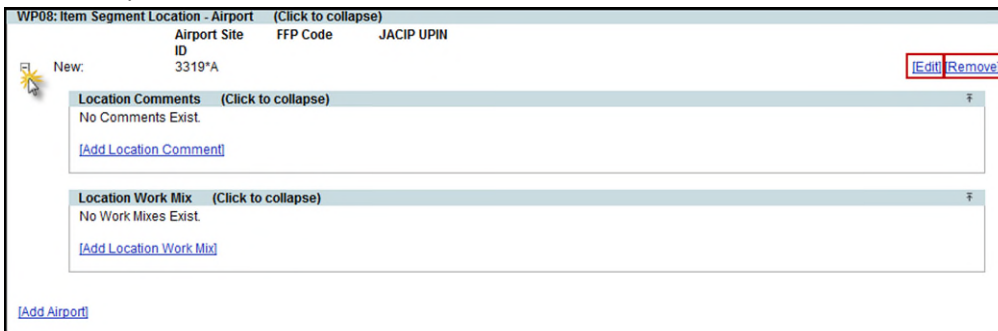
2. Select an Airport from the drop down. This is a required field. The other fields are optional. Click on Save.



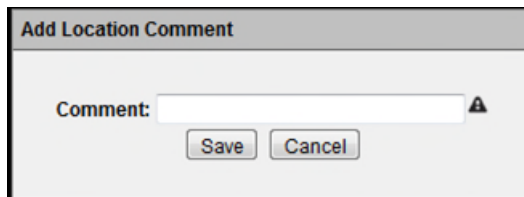
3. The Airport is added as a new Item Segment Location-Airport.



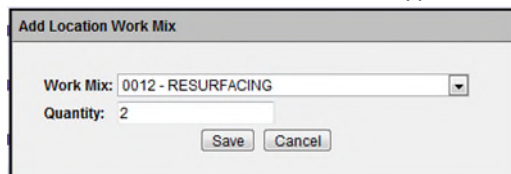
4. Click on the  beside the new Airport to expand Location Comments and Location Work Mix sections for this Airport.



- Click on Add Location Comment hyperlink to add Comments specific to the Airport.



- Click on Add Location Work Mix hyperlink to add Work Mixes specific to the Airport.



7. Select the **Edit** hyperlink beside the new Airport to edit the information in the WP Change Request.

8. If the new Airport is not to be a part of the WP Change Request, select the **Remove** hyperlink beside the new Airport. Click on OK to confirm the removal of the new Airport. This will also remove any Location Comments and Location Work Mixes.

9. If there is an *existing* Airport, the **Propose Change**, **Mark Removed** and **Unmark Removed** hyperlinks will be displayed. Reference the [Requesting Changes to the Existing Item Segment Location](#) section of this document for more instructions on updating an *Existing* Item Segment Locations.

### WP09: Item Segment Location – Seaport

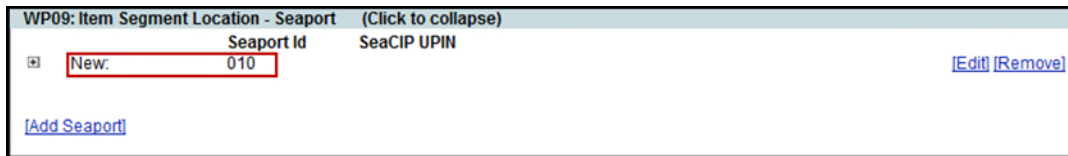
The WP09: Item Segment Location-Seaport allows for requests to add or remove new Seaports to the project.


1. Click on the **Add Seaport** hyperlink to request the addition of a new Seaport to this project.

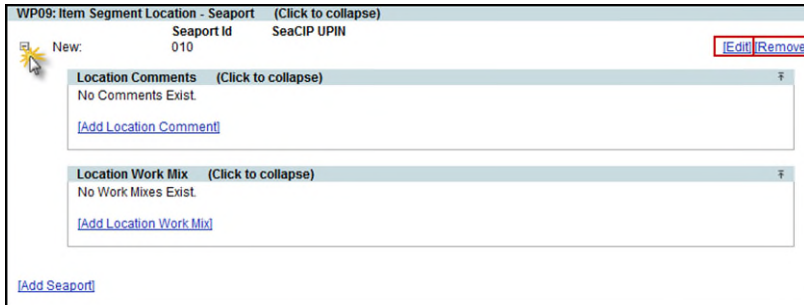
**Note:** If the county where the project is located does not have any Seaports, the following message displays:

2. Select a Seaport from the drop down. This is a required field. The other field is optional. Click on Save.

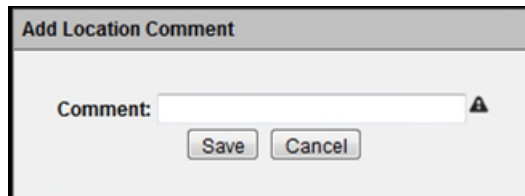
3. The Seaport is added as a new Item Segment Location-Seaport.



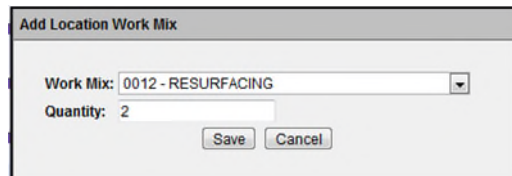
4. Click on the  beside the new Seaport to expand Location Comments and Location Work Mix sections for this Seaport.



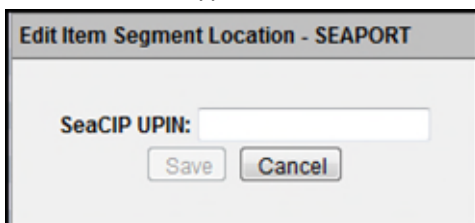
- Click on Add Location Comment hyperlink to add Comments specific to the Seaport.



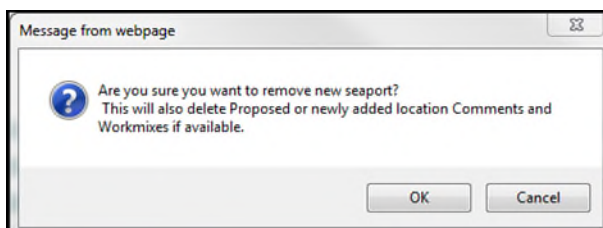
- Click on Add Location Work Mix hyperlink to add Work Mixes specific to the Seaport.



5. Select the **Edit** hyperlink beside the new Seaport to edit the information in the WP Change Request.



6. If the new Seaport is not to be a part of the WP Change Request, select the **Remove** hyperlink beside the new Seaport. Click on OK to confirm the removal of the new Seaport. This will also remove any Location Comments and Location Work Mixes.

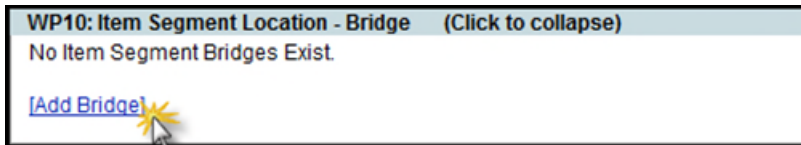


7. If there is an *existing* Seaport, the **Propose Change**, **Mark Removed** and **Unmark Removed** hyperlinks will be displayed. Reference the [Requesting Changes to the Existing Item Segment Location](#) section of this document for more instructions on updating an *existing* Item Segment Locations.

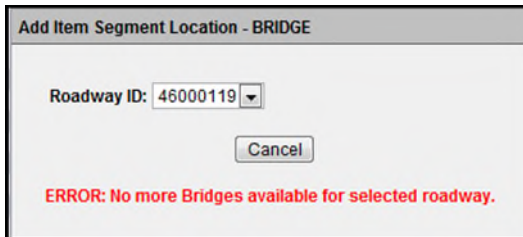
### WP10: Item Segment Location – Bridge

The WP10: Item Segment Location-Bridge allows for requests to add or remove new Bridges to the Project.

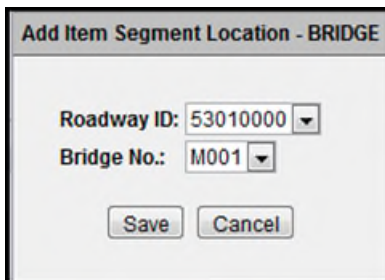
1. Click on the **Add Bridge** hyperlink to request the add of a new Bridge to this project.



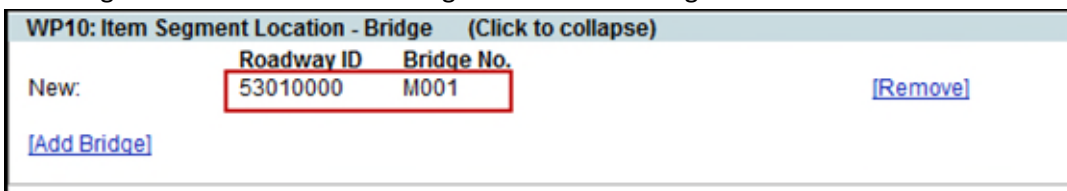
**Note:** If there are no more Bridges within the Roadway ID eligible to be added, the following message displays:



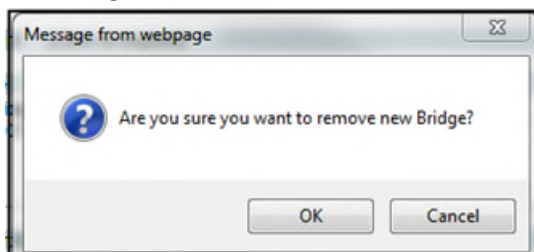
2. Select an Roadway ID from the drop down. The Bridge Numbers available on the selected Roadway ID are displayed in the dropdown for selection. Click on Save.



3. The Bridge is added as a new Item Segment Location-Bridge.



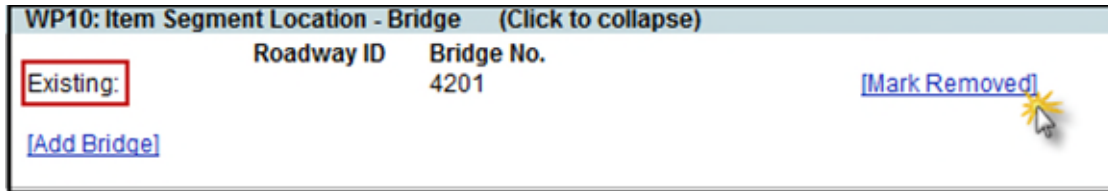
4. If the new Bridge is not to be a part of the WP Change Request, select the **Remove** hyperlink beside the new Bridge. Click on OK to confirm the removal of the new Bridge.



### Requesting changes to Existing Item Segment Location - Bridge

If there is an *existing* Bridge, **Mark Removed** and **Unmark Removed** hyperlinks will be displayed.

1. Click on the **Mark Removed** hyperlink to propose the removal of an *existing* Item Segment Location-Bridge.



2. The *existing* Item Segment Location (Roadway ID) displays '\*\*\*Marked as Removed.'

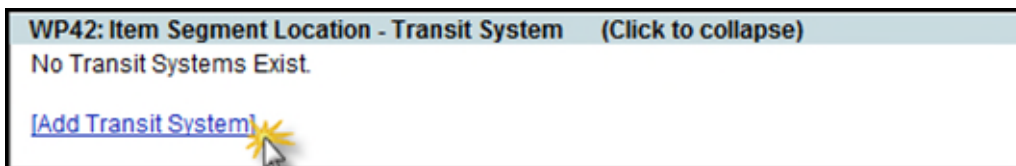


5. If the *existing* Item Segment Location-Bridge should **not** be marked for removal, click on the **Unmark Removed** hyperlink to undo.

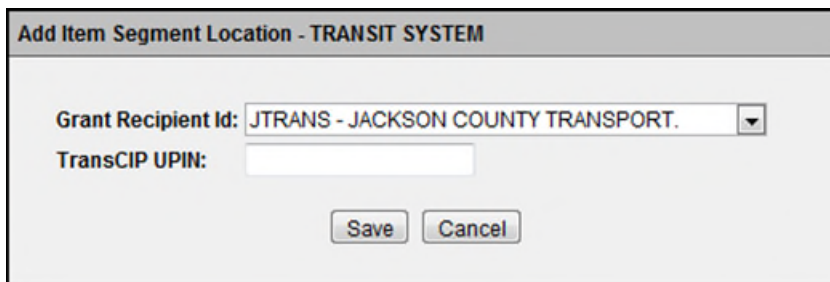
### WP42: Item Segment Location – Transit System

The WP42: Item Segment Location-Transit System allows for requests to add or remove new Transit Systems to the project.

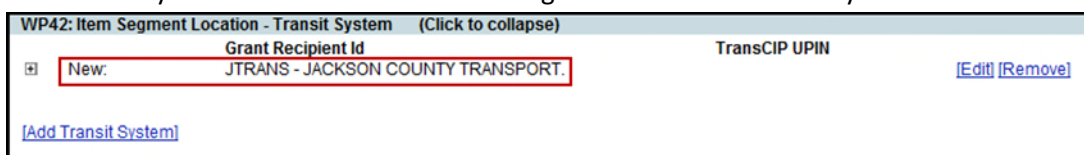
1. Click on the **Add Transit System** hyperlink to request the addition of a new Transit System to this Project.




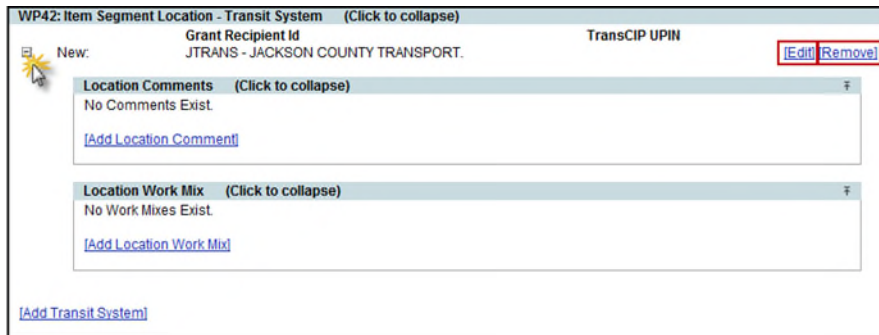
2. Select a Grant Recipient ID from the drop down. This is a required field. The other field is optional. Click on Save.



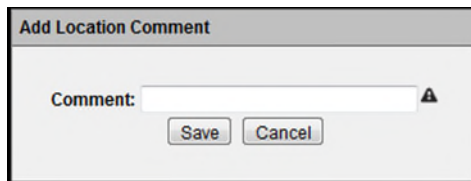
3. The Transit System is added as a new Item Segment Location- Transit System.



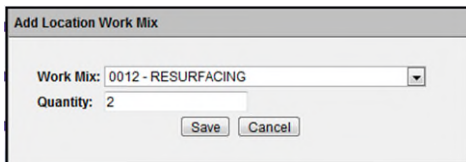
- Click on the  beside the new Transit System to expand Location Comments and Location Work Mix sections for this Transit System.



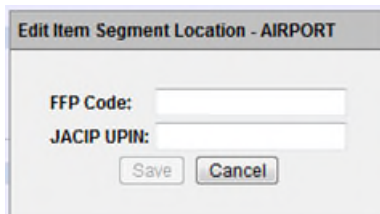
- Click on Add Location Comment hyperlink to add Comments specific to the Transit System.



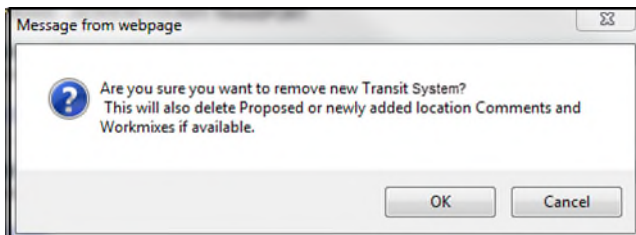
- Click on Add Location Work Mix hyperlink to add Work Mixes specific to the Transit System.



- Select the **Edit** hyperlink beside the new Transit System to edit the information in the WP Change Request.



- If the new Transit System is not to be a part of the WP Change Request, select the **Remove** hyperlink beside the new Transit System. Click on OK to confirm the removal of the new Transit System. This will also remove any Location Comments and Location Work Mixes.



- If there is an *existing* Transit System, the **Propose Change**, **Mark Removed** and **Unmark Removed** hyperlinks will be displayed. Reference the [Requesting Changes to the Existing Item Segment Location](#) section of this document for more instructions on updating an *existing* Item Segment Location.

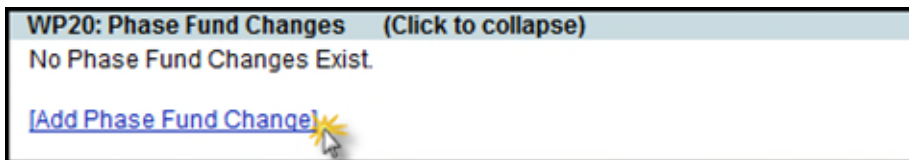
## WP20: Phase Fund Changes

In the WP Change Request, there may be a phase fund change that would be requested to be done on WP20 by the WP Administrator.

**Note:** If the change involves the Phase 52 funds, a WP Phase 52 Change Request should be created. The WP Phase 52 Change Requests are handled separately from the WP Change Requests because they can require a different set of Reviewers to approve. The WP Phase 52 Change Request can also be included in the Project Change Package that are approved or rejected as a bundle. For more information on WP Phase 52 Change Requests, please read the [Help Document](#). If an attempt is made to enter a Phase 52 change as a WP Change Request, the following message will be displayed.


The screenshot shows a window titled "Add Phase Fund Change". It contains several input fields: "Action:" with a dropdown menu set to "Add"; "Moving in/out of box:" with a checkbox; "Phase:" with two dropdown menus set to "5" and "2", and a red error message "ERROR: Phase 52 cannot be part of WP Change Request" to the right; "PDC Amount:", "Fiscal Year:", and "Sequence:" each with a text input field and a required field icon (a triangle with an exclamation mark); "Fund:" with a dropdown menu; and "Program:" with a dropdown menu. At the bottom are "Save" and "Cancel" buttons.

1. Click on the **Add Phase Fund Change** hyperlink to add a Phase Fund Change for the WP Change Request.



2. The "Add Phase Fund Change" window is displayed. The Action defaults to Add. As an Action is selected, the window changes to display the information needed.

The screenshot shows the "Add Phase Fund Change" window with the "Action:" dropdown menu open. The menu options are: Add, Advance, Decrease, Defer, Delete, Increase, and Replace. The "Action:" label and the dropdown menu are highlighted with red boxes. The rest of the window is the same as in the previous screenshot, but the error message is no longer present.

**Note:**  indicates a required field. The symbol disappears when data is entered or a drop down selection is made.

- **Action [Required]:** Select Add.

The screenshot shows a dialog box titled "Add Phase Fund Change". It contains the following fields and controls:

- Action:** A dropdown menu with "Add" selected.
- Moving in/out of box:** A checkbox that is currently unchecked.
- Phase:** Two dropdown menus, both showing "1".
- PDC Amount:** A text input field with a warning icon (triangle with exclamation mark) to its right.
- Fiscal Year:** A text input field with a warning icon to its right.
- Sequence:** A text input field with a warning icon to its right.
- Fund:** A dropdown menu.
- Program:** A dropdown menu.
- At the bottom, there are "Save" and "Cancel" buttons.

- **Moving in/out of box:** Select check box if Box item. Box # and Box Amount are required.
  - **Box # [Required]:** Enter Financial Project number.
  - **Box Amount [Required]:** Enter Box Amount in dollars.
- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.
- **PDC Amount [Required]:** Enter PDC Amount.
- **Fiscal Year [Required]:** Enter Fiscal Year.
- **Sequence [Required]:** Enter Financial Project Sequence number that phase fund change affects.
- **Fund:** Select Fund from the drop down.
- **Program:** Select Program from the drop down.

- **Action [Required]:** Select Advance.

The screenshot shows a dialog box titled "Add Phase Fund Change". It contains the following fields and controls:

- Action:** A dropdown menu with "Advance" selected.
- Phase:** Two dropdown menus, both showing "1".
- Fiscal Year:** A text input field with a warning icon (triangle with exclamation mark) to its right.
- Fiscal Year To:** A text input field with a warning icon to its right.
- Sequence:** A text input field with a warning icon to its right.
- Fund:** A dropdown menu.
- Program:** A dropdown menu.
- At the bottom, there are "Save" and "Cancel" buttons.

- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.
- **Fiscal Year [Required]:** Enter Fiscal Year.
- **Fiscal Year To [Required]:** Enter Fiscal Year to be moved to.
- **Sequence [Required]:** Enter Financial Project Sequence number that phase fund change affects.
- **Fund:** Select Fund from the drop down.
- **Program:** Select Program from the drop down.

- **Action [Required]:** Select Decrease.

The screenshot shows a dialog box titled "Add Phase Fund Change". The "Action" dropdown is set to "Decrease". The "Moving in/out of box" checkbox is unchecked. The "Phase" field has two dropdown menus, both set to "1". The "Increase/Decrease Cost", "Fiscal Year", and "Sequence" fields are empty and have warning icons. The "Fund" and "Program" fields are dropdown menus. "Save" and "Cancel" buttons are at the bottom.

- **Moving in/out of box:** Select check box if Box item. Box # and Box Amount are required.
  - **Box # [Required]:** Enter Financial Project number.
  - **Box Amount [Required]:** Enter Box Amount in dollars.
- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.
- **Increase/Decrease Cost [Required]:** Enter Cost of Decrease.
- **Fiscal Year [Required]:** Enter Fiscal Year.
- **Sequence [Required]:** Enter Financial Project Sequence number that phase fund change affects.
- **Fund:** Select Fund from the drop down.
- **Program:** Select Program from the drop down.

- **Action[Required]:** Select Defer.

The screenshot shows a dialog box titled "Add Phase Fund Change". The "Action" dropdown is set to "Defer". The "Phase" field has two dropdown menus, both set to "1". The "Fiscal Year", "Fiscal Year To", and "Sequence" fields are empty and have warning icons. The "Fund" and "Program" fields are dropdown menus. "Save" and "Cancel" buttons are at the bottom.

- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.
- **Fiscal Year [Required]:** Enter Fiscal Year.
- **Fiscal Year To [Required]:** Enter Fiscal Year to be deferred to.
- **Sequence [Required]:** Enter Financial Project Sequence number that phase fund change affects.
- **Fund:** Select Fund from the drop down.
- **Program:** Select Program from the drop down.

- **Action[Required]:** Select Delete.

The screenshot shows a dialog box titled "Add Phase Fund Change". It contains the following fields and controls:

- Action:** A dropdown menu with "Delete" selected.
- Moving in/out of box:** An unchecked checkbox.
- Phase:** Two dropdown menus, both with "1" selected.
- Buttons:** "Save" and "Cancel" buttons.

- **Moving in/out of box:** Select check box if Box item. Box # and Box Amount are required.
  - **Box # [Required]:** Enter Financial Project number.
  - **Box Amount [Required]:** Enter Box Amount in dollars.
- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.

- **Action[Required]:** Select Increase.

The screenshot shows a dialog box titled "Add Phase Fund Change". It contains the following fields and controls:

- Action:** A dropdown menu with "Increase" selected.
- Moving in/out of box:** An unchecked checkbox.
- Phase:** Two dropdown menus, both with "1" selected.
- Increase/Decrease Cost:** A text input field with a warning icon.
- Fiscal Year:** A text input field with a warning icon.
- Sequence:** A text input field with a warning icon.
- Fund:** A dropdown menu.
- Program:** A dropdown menu.
- Buttons:** "Save" and "Cancel" buttons.

- **Moving in/out of box:** Select check box if Box item. Box # and Box Amount are required.
  - **Box # [Required]:** Enter Financial Project number.
  - **Box Amount [Required]:** Enter Box Amount in dollars.
- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.
- **Increase/Decrease Cost [Required]:** Enter Cost of Increase.
- **Fiscal Year [Required]:** Enter Fiscal Year.
- **Sequence [Required]:** Enter Financial Project Sequence number that phase fund change affects.
- **Fund:** Select Fund from the drop down.
- **Program:** Select Program from the drop down.

- **Action[Required]:** Select Replace.

The screenshot shows a dialog box titled "Add Phase Fund Change". The fields are as follows:

- Action:** A dropdown menu with "Replace" selected.
- Moving in/out of box:** An unchecked checkbox.
- Phase:** Two dropdown menus, both with "1" selected.
- Fiscal Year:** A text input field with a warning triangle icon to its right.
- Sequence:** A text input field with a warning triangle icon to its right.
- Fund:** A dropdown menu.
- Program:** A dropdown menu.

At the bottom of the dialog are "Save" and "Cancel" buttons.

- **Moving in/out of box:** Select check box if Box item. Box # and Box Amount are required.
  - **Box # [Required]:** Enter Financial Project number.
  - **Box Amount [Required]:** Enter Box Amount in dollars.
- **Phase:** Select the Phase. Phase 52 is handled in the WP Phase 52 Change Request.
- **Fiscal Year [Required]:** Enter Fiscal Year.
- **Sequence [Required]:** Enter Financial Project Sequence number that phase fund change affects.
- **Fund:** Select Fund from the drop down.
- **Program:** Select Program from the drop down

## Adding Documents to the WP Change Request

Supporting documents may be attached to the WP Change Requests.

1. From the PSEE WP Change Request Documents section, select the **Upload Document** link.

Work Program (Includes Phases) (Click to collapse)

[Return to WP Change Request List](#) [\[Edit\]](#) [\[Submit\]](#)

**Request Description:** Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force.

**Reason:** Other **Status:** Draft

**Other Reason Text:** Need to update Project information for possible Federal Grant consideration.

**Created Date:** 6/22/2012 **Submitted Date:**

**Completed Date:**

**Requested By:** WILLIAM BARBER **Completer:**

**Reviewer Assignment** (Click to expand)

**WP01: Item Segment Definition** (Click to expand)

**WP03: Item Segment Group** (Click to expand)

**WP07: Item Segment Location - Road** (Click to expand)

**WP08: Item Segment Location - Airport** (Click to expand)

**WP09: Item Segment Location - Seaport** (Click to expand)

**WP10: Item Segment Location - Bridge** (Click to expand)

**WP42: Item Segment Location - Transit System** (Click to expand)

**WP20: Phase Fund Changes** (Click to expand)

**PSEE WP Change Request 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. Add a description for the document [**required**] and select the **Save** button.

**Upload WP Change Request Document**

**File:**

DOCUMENT.docx

**Description:**  37 of 200

- The document appears in the list. Attached documents can be managed from this list. From the list, you can View, Edit or Remove the document.

| PSEE WP Change Request Documents (Click to collapse) |              |               |  |
|--|--------------|---------------|--|
| EDMS Doc No  | Created Date | Document Name | Description  |
| 1682033  | 6/22/2012    | DOCUMENT.docx | Notes from the 6/1/2012 FHWA Meeting. <a href="#">View</a> <a href="#">Edit</a> <a href="#">Remove</a> |

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

[Upload Document](#)

- Select the **View** link to retrieve the document for display.
- Select the **Edit** link to change the description of the document.
- Select the **Remove** link to remove the document from the WP Change Request. You will be prompted with a confirmation dialog box. Select **OK** to remove the document or **Cancel** to retain it.

### Submitting a WP Change Request

Once all information has been entered, a WP Change Request must be submitted to begin the review process.

- If you are accessing the WP Change Request in the Work Program (Includes Phases) Module in PSEE, select **View** to see the details of the WP Change Request.

| Work Program (Includes Phases) (Click to collapse) |              |                |   |                              |
|--|--------------|----------------|---|------------------------------|
| Reason   | Created Date | Submitted Date | Request Description   | Status                       |
| <a href="#">View</a> Other                         | 6/22/2012    |                | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. | Draft <a href="#">Remove</a> |

[Add WP Change Request](#)

- Select the **Submit** hyperlink.

| Work Program (Includes Phases) (Click to collapse) |   |
|--|---|
| <a href="#">Return to WP Change Request List</a>   | <a href="#">Edit</a> <a href="#">Submit</a>   |
| <b>Request Description:</b>                        | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. |
| <b>Reason:</b>                                     | Other <b>Status:</b> Draft  |
| <b>Other Reason Text:</b>                          | Need to update Project information for possible Federal Grant consideration.  |
| <b>Created Date:</b>                               | 6/22/2012 <b>Submitted Date:</b>  |
| <b>Completed Date:</b>                             |   |
| <b>Requested By:</b>                               | WILLIAM BARBER <b>Completer:</b>  |

- The WP Change Request status is changed to **In Review**.

| Work Program (Includes Phases) (Click to collapse) |   |
|--|---|
| <a href="#">Return to WP Change Request List</a>   | <a href="#">Withdraw</a>  |
| <b>Request Description:</b>                        | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. |
| <b>Reason:</b>                                     | Other <b>Status:</b> In Review  |
| <b>Other Reason Text:</b>                          | Need to update Project information for possible Federal Grant consideration.  |
| <b>Created Date:</b>                               | 6/22/2012 <b>Submitted Date:</b> 6/26/2012  |
| <b>Completed Date:</b>                             |   |
| <b>Requested By:</b>                               | WILLIAM BARBER <b>Completer:</b>  |

- The first Assignee is set to an **In Review** status.

| Reviewer Assignment (Click to collapse) |                 |           |                |                          |
|---|-----------------|-----------|----------------|--------------------------|
| Order                                   | Reviewer        | Status    | Completed Date |                          |
| 1                                       | REGINA BATTLES  | In Review |                |                          |
| 2                                       | DUSTIN CASTELLS | Pending   |                | <a href="#">[Remove]</a> |

[\[Add Assignment\]](#)

- An email is generated to the first Reviewer designated in the Reviewer Assignment subsection. Assignee Reviews are completed in the order in which listed. The remaining Assignees are in a Status of Pending and are not notified that they must complete a review until the previous Assignee review has been completed.

**PSEE: Project: 424621-1 Activity: Open WP Change Request Assignment By: WILLIAM BARBER (RD352BW)**

---

FDOT-PSEE-System@dot.state.fl.us Tuesday, June 26, 2012 4:46 PM

From: WILLIAM.BARBER@DOT.MYFLORIDA.COM

Recipients: REGINA.BATTLES@DOT.MYFLORIDA.COM,

Click to see the referenced [Project](#) in PSEE

**Change Request Assignment**

Reviewer: REGINA BATTLES  
 Order: 1  
 Status: In Review  
 Status Date: 6/26/2012  
 Assigned Date: 6/26/2012  
 Comment:

## Reviewer Assignment Comments

1. The Reviewer Assignee may click on the **Status Update** hyperlink to enter any Comments related to the WP Change Request without approving or denying.

| Reviewer Assignment (Click to collapse) |                 |           |                |   |
|---|-----------------|-----------|----------------|---|
| Order                                   | Reviewer        | Status    | Completed Date |   |
| 1                                       | REGINA BATTLES  | In Review |                | <a href="#">[Status Update]</a> <a href="#">[Request Changes]</a> |
| 2                                       | DUSTIN CASTELLS | Pending   |                |   |

2. Select 'In Review' status from the drop down, enter Comments and click on the **Save** button. The In Review status is used only if the Reviewer needs to enter comments and is not ready to approve or reject the Change Request.

**Update Status of Request Assignment**

Status:

Comment:  84 of 2000

## Completing a Reviewer Assignment

1. To complete a Review Assignment, the Reviewer Assignee must Approve or Reject the request by updating the status. Select the **Status Update** hyperlink.

| Reviewer Assignment (Click to collapse) |                 |           |                |   |
|---|-----------------|-----------|----------------|---|
| Order                                   | Reviewer        | Status    | Completed Date |   |
| 1                                       | REGINA BATTLES  | In Review |                | <a href="#">[Status Update]</a> <a href="#">[Request Changes]</a> |
| 2                                       | DUSTIN CASTELLS | Pending   |                |   |

2. Change the Status in the drop down and enter any Comments [optional]. Click on the **Save** button.

**Update Status of Request Assignment**

Status:

Comment:  42 of 2000

3. Changing the status to **Approved** will notify the next Reviewer to complete his review.
4. Once the last Reviewer approves and there are no more Reviewer Assignments, the Change Request status will be set to Approved.

Work Program (Includes Phases) (Click to collapse)

[Return to WP Change Request List](#) [\[Reject\]](#) [\[Complete\]](#)

**Request**  
 Description: Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force.  
 Reason: Other **Status:** Approved  
 Other Reason Text: Need to update Project information for possible Federal Grant consideration.  
 Created Date: 6/22/2012 Submitted Date: 6/26/2012  
 Completed Date:  
 Requested By: WILLIAM BARBER Completer:

**Reviewer Assignment** (Click to collapse)

| Order | Reviewer        | Status   | Completed Date |
|-------|-----------------|----------|----------------|
| 1     | REGINA BATTLES  | Approved | 6/26/2012      |
| 2     | DUSTIN CASTELLS | Approved | 6/26/2012      |

5. The status of the Reviewer Assignment is updated. To view the details of the Reviewer Assignment, select the plus link to the left of the Assignee name.

**Reviewer Assignment** (Click to collapse)

| Order | Reviewer       | Status   | Completed Date |
|-------|----------------|----------|----------------|
| 1     | REGINA BATTLES | Approved | 6/26/2012      |

**Comment:** I am in agreement with the Change Request.

6. Changing the status to **Rejected** will finish the Review Assignment and will stop the Change Request from moving forward and being approved. The Requestor is notified that the Change Request is rejected. The Information entered in the Comments is viewable by the Requestor when Rejected.

**Update Status of Request Assignment**

**Status:** In Review

**Comment:** Approved  
 In Review  
 Rejected

The Change Request until more justification is provided. 69 of 2000

Save Cancel

## Request Changes to the WP Change Request

1. When the Reviewer needs more information to complete his/her review, click on Request Changes hyperlink.

| Reviewer Assignment (Click to collapse) |                 |           |                |   |
|---|-----------------|-----------|----------------|---|
| Order                                   | Reviewer        | Status    | Completed Date |   |
| 1                                       | REGINA BATTLES  | In Review |                | <a href="#">[Status Update]</a> <a href="#">[Request Changes]</a> |
| 2                                       | DUSTIN CASTELLS | Pending   |                |   |

2. Enter the questions or request for additional information. Click on the Save button.

**Request Changes to Change Request**

Comment: 84 of 2000

Review is on hold until supporting documentation is received from the Design office.

3. The Change Request status is changed to Revision and the Review Assignments are set to Pending. This will stop the Change Request from moving forward and being approved. The Requestor is notified that Change Request needs revision. The Information entered in the Comment field is viewable by the Requestor.

| Work Program (Includes Phases) (Click to collapse)  |   |         |                |                          |
|---|---|---------|----------------|--------------------------|
| <a href="#">Return to WP Change Request List</a> <span style="float: right;"><a href="#">[Edit]</a> <a href="#">[Submit]</a></span> |   |         |                |                          |
| Request Description:  | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. |         |                |                          |
| Reason:   | Other <span style="border: 1px solid red; padding: 2px;">Status: Revision</span>  |         |                |                          |
| Other Reason Text:  | Need to update Project information for possible Federal Grant consideration.  |         |                |                          |
| Created Date:   | 6/22/2012 <span style="margin-left: 50px;">Submitted Date:</span>   |         |                |                          |
| Completed Date:   |   |         |                |                          |
| Requested By:   | WILLIAM BARBER <span style="margin-left: 50px;">Completer:</span>   |         |                |                          |
| Reviewer Assignment (Click to collapse)   |   |         |                |                          |
| Order   | Reviewer  | Status  | Completed Date |                          |
| 1   | REGINA BATTLES  | Pending |                | <a href="#">[Remove]</a> |
| 2   | DUSTIN CASTELLS   | Pending |                | <a href="#">[Remove]</a> |
| <a href="#">[Add Assignment]</a> <a href="#">[Reorder Assignments]</a>  |   |         |                |                          |

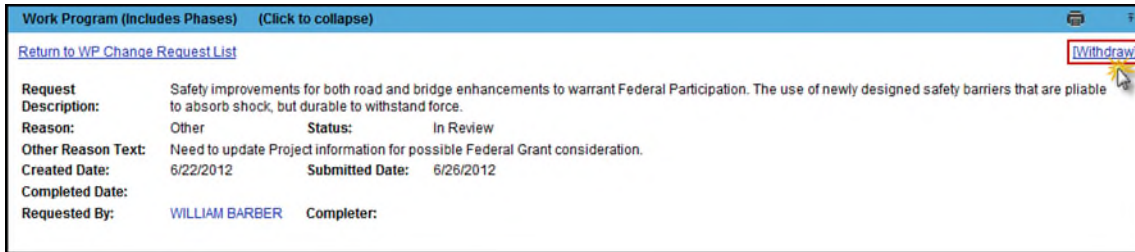
4. Once revisions are made to satisfy the requested changes, the Change Request can be submitted again. The Change Request starts over again with the first Reviewer Assignment.

## The Withdraw Of the WP Change Request

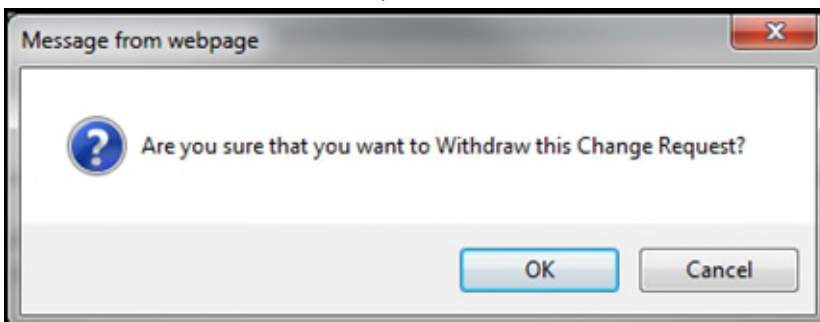
A WP Change Request may be withdrawn if it is determined that it is no longer needed.

Once a WP Change Request is submitted changing from a DRAFT status to an In Review status, the Change Request can no longer be removed, but can be withdrawn by anyone with privilege. The Withdraw hyperlink appears in the upper right hand corner for the PSEE Project Manager or the User with the *Manage Work Program Change Request* privilege.

1. Select the Withdraw hyperlink.



2. There is a confirmation that asks "Are you sure you want to Withdraw this Change Request? This action cannot be undone." Click OK to proceed with the withdrawal of the Change Request.



## Revision of the Estimate Change Request

**Note:** The PSEE Project Manager or the User with the *Manage Work Program Change Request* privilege has the authority to revise, edit, and submit.

A WP Change Request in a Status of Withdrawn can be **revised** by anyone with privileges. The **Revise** hyperlink appears for a WP Change Request in a status of Withdrawn.

1. Select the Revise hyperlink.

The screenshot shows a web interface for a Work Program Change Request. At the top, there is a blue header bar with the text "Work Program (Includes Phases) (Click to collapse)" and a search icon. Below the header, there is a link "Return to WP Change Request List" and a "[Revise]" hyperlink with a mouse cursor pointing to it. The main content area contains the following details:

|                             |   |                        |           |
|-----------------------------|---|------------------------|-----------|
| <b>Request Description:</b> | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. |                        |           |
| <b>Reason:</b>              | Other   | <b>Status:</b>         | Withdrawn |
| <b>Other Reason Text:</b>   | Need to update Project information for possible Federal Grant consideration.  |                        |           |
| <b>Created Date:</b>        | 6/22/2012   | <b>Submitted Date:</b> | 6/26/2012 |
| <b>Completed Date:</b>      |   |                        |           |
| <b>Requested By:</b>        | WILLIAM BARBER  | <b>Completer:</b>      |           |

2. The WP Change Request is set to a Revision status. The user may click on the Edit hyperlink to make changes.

The screenshot shows the same web interface as the previous one, but the status has been updated. The "Status" field now shows "Revision" in yellow. The "[Revise]" hyperlink has been replaced by "[Edit]" and "[Submit]" hyperlinks, with a mouse cursor pointing to the "[Edit]" link.

|                             |   |                        |          |
|-----------------------------|---|------------------------|----------|
| <b>Request Description:</b> | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. |                        |          |
| <b>Reason:</b>              | Other   | <b>Status:</b>         | Revision |
| <b>Other Reason Text:</b>   | Need to update Project information for possible Federal Grant consideration.  |                        |          |
| <b>Created Date:</b>        | 6/22/2012   | <b>Submitted Date:</b> |          |
| <b>Completed Date:</b>      |   |                        |          |
| <b>Requested By:</b>        | WILLIAM BARBER  | <b>Completer:</b>      |          |

3. The WP Change Request can be Submitted after editing is complete. A Submit will start the process again with the first Reviewer Assignment.

The screenshot shows the same web interface as the previous one, but the status has been updated to "Revision" and the "[Edit]" and "[Submit]" hyperlinks are visible. A mouse cursor is pointing to the "[Submit]" link.

|                             |   |                        |          |
|-----------------------------|---|------------------------|----------|
| <b>Request Description:</b> | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. |                        |          |
| <b>Reason:</b>              | Other   | <b>Status:</b>         | Revision |
| <b>Other Reason Text:</b>   | Need to update Project information for possible Federal Grant consideration.  |                        |          |
| <b>Created Date:</b>        | 6/22/2012   | <b>Submitted Date:</b> |          |
| <b>Completed Date:</b>      |   |                        |          |
| <b>Requested By:</b>        | WILLIAM BARBER  | <b>Completer:</b>      |          |

## Completing the WP Change Request

Once all Reviewer Assignments for the WP Change Request are complete, the WP Administrator will be notified to make the WP update in Work Program in the FM system.

**Note:** The PSEE Project Manager has the authority to complete the WP Change Request in PSEE on behalf of the WP Administrator to document that the WP update has been made in Work Program in the FM system.

The WP Administrator must be granted the *Complete Work Program Change Request* privilege in order to get the display of the Complete and Reject hyperlinks in PSEE. After making the WP Change Request update in Work Program in the FM system, the WP Administrator that has been granted privilege can complete the WP Change Request in PSEE.

1. WP Administrator clicks on the Complete hyperlink.

The screenshot shows a web interface for a Work Program Change Request. At the top, there is a header "Work Program (Includes Phases) (Click to collapse)" and a "Return to WP Change Request List" link. On the right, there are "[Reject]" and "[Complete]" buttons. The main form contains the following fields:

- Request Description:** Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force.
- Reason:** Other
- Status:** Approved
- Other Reason Text:** Need to update Project information for possible Federal Grant consideration.
- Created Date:** 6/22/2012
- Submitted Date:** 6/26/2012
- Completed Date:** (empty)
- Requested By:** WILLIAM BARBER
- Completer:** (empty)

Below the form is a "Reviewer Assignment (Click to collapse)" table:

| Order | Reviewer        | Status   | Completed Date |
|-------|-----------------|----------|----------------|
| 1     | REGINA BATTLES  | Approved | 6/26/2012      |
| 2     | DUSTIN CASTELLS | Approved | 6/26/2012      |

2. The WP Change Request status is set to Completed. The WP Administrator's name or PSEE Project Manager's name is entered in the Completer field that completes the WP Change Request in PSEE. The Completed Date defaults to the current date.

This screenshot shows the same WP Change Request form as above, but with the following updates:

- Status:** Completed
- Completed Date:** 6/26/2012
- Completer:** TINA HAGANS

## WP Administrator Rejection of the WP Change Request

Once all Reviewer Assignments for the Change Request are complete and the WP Change Request status is Approved, the WP Administrator will be notified. If the District WP Administrator determines that there is some reason that the WP Change Request cannot be completed in the Work Program in the FM system, the WP Administrator will click on the Reject hyperlink in the WP Change Request.

Work Program (Includes Phases) (Click to collapse)

[Return to WP Change Request List](#) [\[Reject\]](#) [\[Complete\]](#)

**Request Description:** Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force.

**Reason:** Other **Status:** Approved

**Other Reason Text:** Need to update Project information for possible Federal Grant consideration.

**Created Date:** 6/22/2012 **Submitted Date:** 6/26/2012

**Completed Date:**

**Requested By:** WILLIAM BARBER **Completer:**

**Reviewer Assignment (Click to collapse)**

| Order | Reviewer        | Status   | Completed Date |
|-------|-----------------|----------|----------------|
| 1     | REGINA BATTLES  | Approved | 6/26/2012      |
| 2     | DUSTIN CASTELLS | Approved | 6/26/2012      |

## WP Change Request Removal

If it is determined that the WP Change Request is not needed and it is in a status of Draft, it can be removed.

1. Click on the Remove hyperlink.

Work Program (Includes Phases) (Click to collapse)

| Reason                         | Created Date | Submitted Date | Request Description   | Status                         |
|--------------------------------|--------------|----------------|---|--------------------------------|
| <a href="#">ViewManagement</a> | 6/22/2012    |                | Executive Order   | Draft <a href="#">[Remove]</a> |
| <a href="#">ViewOther</a>      | 6/22/2012    |                | Safety improvements for both road and bridge enhancements to warrant Federal Participation. The use of newly designed safety barriers that are pliable to absorb shock, but durable to withstand force. | Draft <a href="#">[Remove]</a> |

[\[Add WP Change Request\]](#)

2. Confirm the removal by clicking on OK.

Message from webpage

Are you sure you want to remove this WP Change Request?

OK Cancel

3. The WP Change Request is removed.