



# Florida Department of TRANSPORTATION

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## Independent Assurance Program Maintenance User Manual

July 2, 2024

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## Updates

This section summarizes the updates in this document from the last posted version.

<b>Description</b>	<b>Page #</b>
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## Introduction

### Who is the FDOT Independent Assurance Program Maintenance User?

The Independent Assurance (IA) Program Maintenance User (PMU) is a person working for the District Materials and Research Office (DMRO) or State Materials Office (SMO) who manages the Independent Assurance Program requirements and performs IA evaluations. This manual describe the functions performed by the IA PMU in MAC.

There are four types of IA evaluations: 1) Observation, 2) Split Sample, 3) Observation/Split Sample, and 4) Proficiency Sample. The requirements for the Independent Assurance Program are contained in [Materials Manual Section 5.5 Volume 1 Independent Assurance Program](#). These instructions are intended to cover the MAC functionality related to the Materials Manual, not supersede, or replace the program requirements. If there is a conflict between the *Materials Manual* and these instructions, the *Materials Manual 5.5 V1* takes precedence.

**NOTE:** When a Qualification Performance Report (QPR) for an IA Evaluation is generated from MAC, it is an official document sent out by FDOT that cannot be retrieved. It **cannot** be deleted at that point. **MAKE SURE THE INFORMATION IS CORRECT AND COMPLETE before you generate the QPR!** ([Chapter 12 – Generating the Qualification Performance Report \(QPR\)](#)).

**NOTE:** Currently MAC does not have an “effective date” associated with an evaluation. For Observation, Split Sample, and Observation/Split Sample evaluations, it is essential the data be entered into MAC as soon as the evaluation is complete. If there is a delay in the entry, the technician’s qualification area expires and you use printed checklists, you may not be able to enter the evaluation. The report tracking evaluation percentages will not be manually revised to include any “outside of MAC” evaluations.

**NOTE:** Do not use Open Evaluation for an unsatisfactory evaluation to remove the strike. The technician must be reevaluated with a new evaluation and a different evaluator. See [Chapter 18 – Managing Strikes](#). Selecting the Open Evaluation option on an Unsatisfactory evaluation that does not need to be updated will result in an additional strike.

## Chapter 1 – Independent Assurance Reports

There are several reports designed to assist IA PMUs.

### A. MAC IA Analysis Report

This report is the primary report used in the IA Program. It shows the progress made so far as the fiscal year passes.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<a href="#">Technician Requal Report</a>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the MAC IA Analysis Report option.

A MAC IA Analysis Report dialog box appears.

2. **Start Date** – enter the first day of the evaluation period or select it from the calendar.

3. **End Date** – enter the last day of the evaluation period or select it from the calendar.

**NOTE:** As the fiscal year progresses, the range will expand. For example, on July 31 the date range would be 07/01/202X to 07/31/202X. On August 31, the date range would be 07/01/202X to 08/31/202X.

**NOTE:** This report is highly complex and can exceed the time limit set by MAC for generating reports, especially towards the end of the fiscal year. If you receive a time out error, try again. If it continues, contact the SMO IA Program Coordinator to request to have the report generated outside of MAC and the data to be sent to you.

4. **Category** – Select the Material Category to filter to a specific set of technicians.
5. **Managing District** – select the managing district of the IA evaluator.
6. **Report Format** – select the desired format.
7. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

The report will open in the format you selected.

Tech Name	Number Sampled/Tested	QPR Evaluation Date	Evaluation Number	Sample ID	Date Sampled	Tech Level	Project	Lab	Phone Number
[redacted]	4			1435825	05/30/2024	V	435786-1-52-01	105056	4072755120
[redacted]	3			1415340	05/10/2024	V		105028	3216322503
[redacted]	3			1429080	05/22/2024	V	445709-1-52-01	105038	4078553860

## B. IAer Analysis Report

This report shows which IA evaluators need to be evaluated.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<a href="#">Technician Requal Report</a>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the IAer Analysis Report option.

An IAer Analysis Report dialog box appears.

2. **Category** – Select the Material Category to filter to specific IA evaluators.
3. **Managing District** – select the managing district of the IA evaluator.
4. **Start Date** – enter the first day of the evaluation period or select it from the calendar.
5. **End Date** – enter the last day of the evaluation period or select it from the calendar.

**NOTE:** As the fiscal year progresses, the range will expand. For example, on July 31 the date range would be 07/01/202X to 07/31/202X. On August 31, the date range would be 07/01/202X to 08/31/202X.

6. **Report Format** – select the desired format.
7. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

The report will open in the format you selected.

Category: All      IAer Analysis Report for MAC and LIMS      to 04/01/2024  
 District:      to 06/05/2024

**AASHTOT21 - Organic Impurities in Fine Aggregates for Concrete**

Tech Name	Number of QPRs	District	Number of Failed QPRs	Most Recent QPR Evaluation	Number of IAs	Number of Failed IAs	IA Evaluator	IA Evaluation Date
C			0	104414	1	0		05/16/2024
D			0	104412	1	0		05/16/2024
H			0	104416	1	0		05/16/2024
K			0	104638	1	0		05/22/2024
L			0	103996	1	0		05/07/2024
P			0	104004	1	0		05/07/2024
P			0	104750	0	0		

## C. Expiring Technicians

This report displays the technicians who will be expiring in the near future.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<a href="#">Technician Requal Report</a>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the Expiring Technicians option.

An Expiring Technicians dialog box appears.

The screenshot shows a dialog box titled "Expiring Technicians" with the following fields and controls:

- Start Date:** A date input field with a calendar icon and a blue circled number 2.
- End Date:** A date input field with a calendar icon and a blue circled number 3.
- States:** A dropdown menu with a blue circled number 4.
- Geographic Districts:** A dropdown menu with a blue circled number 5.
- Managing District:** A dropdown menu with a blue circled number 6.
- Qualification:** A dropdown menu with a blue circled number 7 and a red asterisk.
- Report Format:** A dropdown menu with a blue circled number 8 and a red asterisk.
- Submit:** A button at the bottom right.

2. **Start Date** – enter the first day of the technician qualification period or select it from the calendar.

3. **End Date** – enter the last day of the technician qualification period or select it from the calendar.

4. **States** – select the state of the technicians Lab Id (for example Georgia for GA lab) from the dropdown. Repeat if there is more than one state.

**NOTE:** MAC does not connect technicians to states. This designation would be associated with the physical address of a laboratory.

5. **Geographic Districts** – select the geographic district of the ? from the dropdown. Repeat if there is more than one geographic district.

6. **Managing Districts** – select the managing district of the ? from the dropdown. Repeat if there is more than one managing district.

7. **Qualification** – select the qualification area from the dropdown. Repeat if there is more than one qualification area.

8. **Report Format** – select the desired format.

9. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

The report will open in the format you selected.

Expiration Date	Last Name	First Name	Email	Lab ID	Geographic District	Managing District	State
Qualification: Concrete Field Technician Level 1							
6/1/2024				104003	4		FL
6/1/2024				104046	4		FL
Qualification: Earthwork Construction Inspection Level 1							
6/4/2024				105035	5		FL

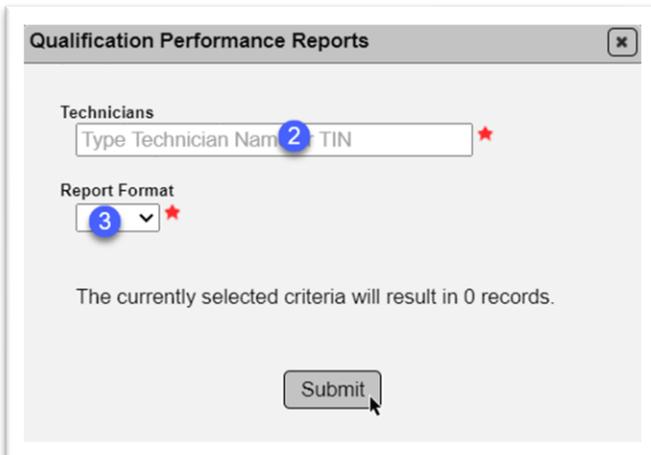
#### D. Qualification Performance Reports

This report will generate a list of the QPR(s) for a specific technician.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<a href="#">Technician Requal Report</a>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the Qualification Performance Reports option.

A Qualifications Performance Reports dialog box appears.



The dialog box titled "Qualification Performance Reports" contains the following elements:

- Technicians:** A text input field with the placeholder "Type Technician Name" and the value "TIN". A blue circle with the number "2" is positioned over the input field, and a red star is to its right.
- Report Format:** A dropdown menu with a blue circle containing the number "3" over the selection arrow, and a red star to its right.
- Message:** "The currently selected criteria will result in 0 records."
- Submit:** A button labeled "Submit" with a mouse cursor pointing to it.

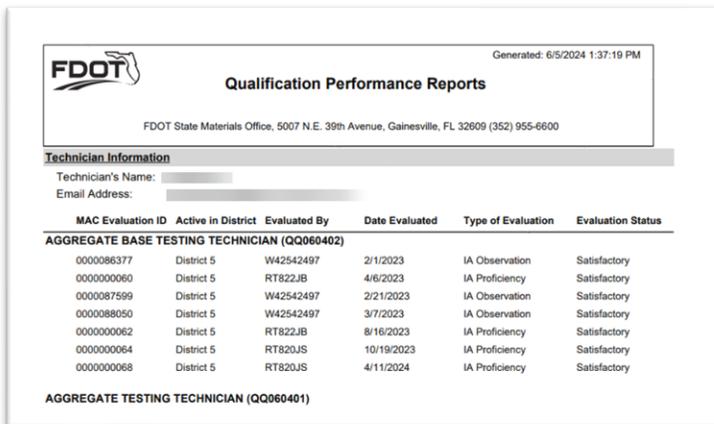
2. **Technicians** – enter the name or TIN of the first technician and select the entry from the returned list. Repeat if there is more than one technician.

3. **Report Format** – select the desired format.

4. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

The report will open in the format you selected.



Generated: 6/5/2024 1:37:19 PM

**FDOT** Qualification Performance Reports

FDOT State Materials Office, 5007 N.E. 39th Avenue, Gainesville, FL 32609 (352) 955-6600

**Technician Information**

Technician's Name: [REDACTED]  
Email Address: [REDACTED]

MAC Evaluation ID	Active in District	Evaluated By	Date Evaluated	Type of Evaluation	Evaluation Status
<b>AGGREGATE BASE TESTING TECHNICIAN (QQ060402)</b>					
0000086377	District 5	W42542497	2/1/2023	IA Observation	Satisfactory
0000000060	District 5	RT822JB	4/6/2023	IA Proficiency	Satisfactory
0000087599	District 5	W42542497	2/21/2023	IA Observation	Satisfactory
0000088050	District 5	W42542497	3/7/2023	IA Observation	Satisfactory
0000000062	District 5	RT822JB	8/16/2023	IA Proficiency	Satisfactory
0000000064	District 5	RT820JS	10/19/2023	IA Proficiency	Satisfactory
0000000068	District 5	RT820JS	4/11/2024	IA Proficiency	Satisfactory
<b>AGGREGATE TESTING TECHNICIAN (QQ060401)</b>					

## E. Technician Requal Report

This report will analyze if a specific technician is eligible for the requalification program for a specific qualification area. The technician should generate the report and submit it to the Construction Training and Qualification (CTQP) administrator. IA PMUs may be asked for assistance so you should be familiar with generating the report.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<b><a href="#">Technician Requal Report</a></b>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the Technician Requal Report option.

A Technician Requal Report dialog box appears.

2. **TIN** – enter the name or TIN of the technician and select the entry from the returned list.
3. **Qualification Area** – select a qualification area from the dropdown.
4. **Date** – enter today’s date to have MAC analyze from today’s date.
5. **Report Format** – select the desired format.
6. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

The report will open in the format you selected. It identifies to the technician the different criteria and if the technician meets all of them to be eligible for requalification.

Generated: 10/11/2022 1:57:35 PM

**LBR Technician**

**Date Evaluated: 10/11/2022**

**I. NUMBER OF TESTS PERFORMED:**

Minimum Required: 305      Total Tests Performed: 573      REQUIREMENT MET? **YES**

**II. IA EVALUATIONS:**

Evaluation Date	Evaluation ID (with Failed Tests/Checklists)	Evaluation Type	Status
4/6/2022	0000000053	IA Proficiency	Pass
4/8/2021	0000000045	IA Proficiency	Pass
8/4/2020	0000053315	IA Observation	Pass
5/20/2020	0000000036	IA Proficiency	Fail
	IA: FM 5-515 Limerock Bearing Ratio (Method: FM 5-515)		
5/20/2020	0000000036	IA Proficiency	Fail
	IA: FM 5-515 Limerock Bearing Ratio (Method: FM 5-515)		

Are All Strikes Cleared?      YES      REQUIREMENT MET? **YES**

Is the Number of IA Evaluation Years at least 3?      4      REQUIREMENT MET? **YES**

Is IA'ed with at least 1 Observation?      1      REQUIREMENT MET? **YES**

---

**RE-QUALIFICATION STATUS:**

Technician QUALIFIED for Re-qualification Program.

F. Technician Stats for Requal

This report does provides a list of technicians who meet the requalification criteria for a specific qualification area.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<a href="#">Technician Requal Report</a>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the Technician Status for Requal option.

A Technician Stats for Requal dialog box appears.

2. **Start Date** – enter the first day of the technician qualification period or select it from the calendar; for example, 07/01/2023.
3. **End Date** – enter the last day of the technician qualification period or select it from the calendar; for example 06/30/2024.
4. **Qualification Area** – select the qualification area from the dropdown.
5. **Technician** – enter the name or TIN of the technician and select the entry from the returned list, if desired.

**NOTE:** This report is not designed for an individual technician’s results to be used for CTQP confirmation. This option is intended for a quick check for IA PMUs.

6. **Report Format** – select the desired format.
7. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

Name	All Strikes Cleared	No. of IA Evaluation Years	No. of IA by Observation	AASHTOT21	AASHTOT255	AASHTOT27	FM1-R076	FM1-T011	FM1-T084	FM1-T085	Total Test Performe
is	YES	1	1			2	1	2			5
	YES	1	2		36	1776	1776	538	18	18	4162
o	YES	1	2			2		2			4
	YES	0	0				1	1			2
ia	YES	1	1			2		2			4
s	YES	1	1		45	691	691	240	30	15	1712
	YES	1	1	15		186	186	17			404
	YES	1	0			3		3			6

## G. Technicians with a Strike

This report summarizes technicians who have been given one or more strikes.

Independent Assurance	
<a href="#">Expiring Technicians</a>	A list of technicians whose qualification expires in the given time period.
<a href="#">IAer Analysis Report</a>	Summary of Evaluations for District IA Personnel
<a href="#">MAC IA Analysis Report</a>	Summary of Evaluations for QC, VT, IV and RT Technicians.
<a href="#">Qualification Performance Reports</a>	Summary of all QPRs for a given TIN
<a href="#">Technician Requal Report</a>	Certificate showing eligibility/ineligibility for requalification.
<a href="#">Technician Stats for Requal</a>	A list of technicians and their statistics per qualification area.
<a href="#">Technicians with Strike</a>	Summary of District Technicians with one or more Strikes in a date range

1. Select the Technicians with Strike option.

A Technicians with Strike dialog box appears.

The dialog box titled "Technicians with Strike" contains the following fields:

- Strike Date Range Start: A text input field with a red star icon and a blue circle containing the number 2.
- Strike Date Range End: A text input field with a red star icon and a blue circle containing the number 3.
- Districts: A dropdown menu with a blue circle containing the number 4.
- Report Format: A dropdown menu with a red star icon and a blue circle containing the number 5.
- Submit: A button at the bottom of the dialog.

2. **Strike Date Range Start** – enter the beginning date of the time frame where you want to search for strikes.

3. **Strike Date Range End** – enter the ending date of the time frame where you want to search for strikes.

4. **Districts** – select a district from the dropdown. Repeat if there is more than one district.

5. **Report Format** – select the desired format.

6. Select the Submit option.

MAC will download the report. This may take some time, depending on the date range. Select the open file option for the browser you are using.

Technician's Name	Strike No.	Status	IA Evaluator/Observer	Date Evaluated	Active in District
<b>AGGREGATE TESTING TECHNICIAN (QQ060401)</b>					
[REDACTED]	1	Valid	K [REDACTED]	5/30/2024	District [REDACTED]
<b>EARTHWORK CONSTRUCTION INSPECTION - LEVEL 1 (QQ060301)</b>					
[REDACTED]	1	Valid	M [REDACTED]	5/17/2024	District [REDACTED]

## Chapter 2 – Checklists

IA evaluators can enter data in MAC directly if they have a device with internet connectivity. The reports can also be printed so that the evaluation can be documented manually and the results entered when the evaluator returns to the office. If the evaluation is conducted using hard copy checklists, the completed checklists should be attached to the evaluation record in MAC. You can print the checklists from a MAC report or from the evaluation. To print the checklists from an evaluation, see Chapter 5, [G. Printing Multiple Checklists](#).

**NOTE:** The SMO website containing Word versions of the checklist has been deactivated. MAC is the system of record and evaluators should use the checklists stored in MAC.

To print the most current checklist using a MAC report:



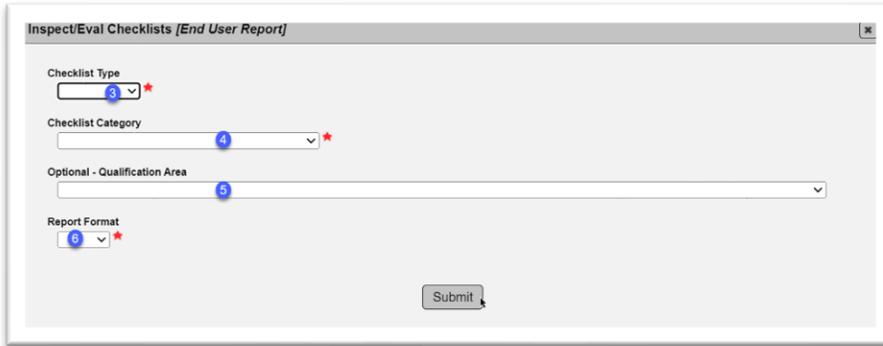
1. Select the Reports menu option.

The report can be used to print production facility inspection, laboratory evaluation and IA evaluation checklists. The report is located under the Production Facility tab.



2. Under the Production Facility tab, select the Inspect/Eval Checklists option.

A report dialog box will appear.



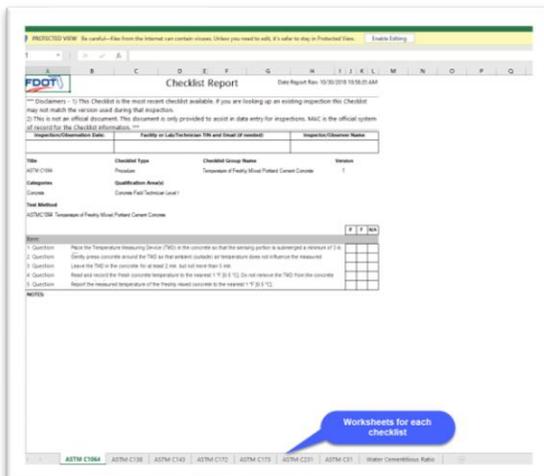
3. **Checklist Type** – select Equipment or Procedure. If both are needed, generate two reports, one for each.
4. **Checklist Category** – select the material category for the qualification. Be careful as this dropdown includes materials for Production Facility Inspections. For example, use concrete for a Concrete Field Level I evaluation. Structural concrete is for the production facility inspections.
5. **Optional – Qualification Area** – select the qualification area. This is not optional for IA evaluation checklists.
6. **Report Format** – select the appropriate format, Excel, or pdf. If you select Excel, each checklist will appear on its own worksheet tab.
7. Select Submit to generate the report.

MAC will download the data. A download pop up window will appear.



8. Select the Open option.

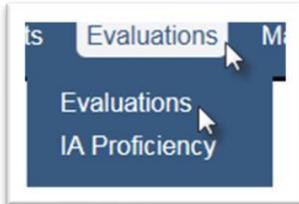
The report will be opened in the format you selected.



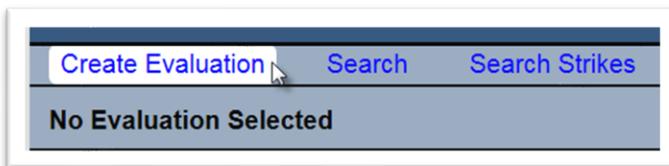
**NOTE:** If you created an evaluation, use the Print Multiple Checklists option instead of this report. You may find that the checklists do not match what is on the evaluation record if the checklists in MAC have been updated since you created the evaluation. To print the checklists, see Chapter 5, [G. Printing Multiple Checklists](#).

## Chapter 3 – Creating an Observation Evaluation on a Laboratory Qualification Area

To create an Observation evaluation on a laboratory qualification area; for example, Concrete Lab Level 1:

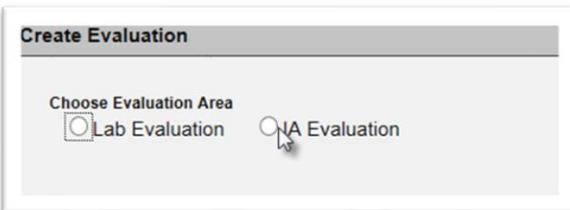


1. Select the Evaluations menu option.
2. Select Evaluations submenu option.



3. Select the Create Evaluation option.

A Create Evaluation dialog box will appear



4. **Choose Evaluation Area** – select the IA Evaluation option.

The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.

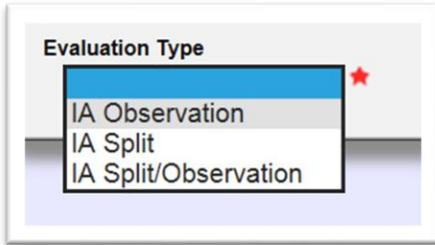


5. **Qualification Area** – select the appropriate qualification area from the dropdown list, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately.

This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. See [Chapter 18 – Managing Strikes](#).

The Evaluation Type selection field will appear.



6. **Evaluation Type** – select the IA Observation option from the dropdown list.

A screenshot of a web form for evaluation. The form includes several fields and sections: "Choose Evaluation Area" with radio buttons for "Lab Evaluation" and "IA Evaluation" (selected); "Qualification Area" with a dropdown menu set to "Aggregate Testing Technician"; "Evaluation Type" with a dropdown menu set to "IA Observation"; "Evaluation District" with a dropdown menu set to "7"; "Lab Being Evaluated" with a text input field containing "Start typing Lab name or Lab I"; "Evaluator" with a text input field containing "Type Technici"; "Technician Type" with a dropdown menu set to "10"; "Technician" with a text input field containing "Type Technici"; "Technician's Email" with a text input field containing "12"; and "Supervisor's Email" with a text input field containing "13". Red stars are placed next to several fields. Blue callout boxes with numbers 7 through 13 are overlaid on the form to indicate specific steps.

7. **Evaluation District** – enter the District of the Evaluator.

**NOTE:** If the evaluation is being performed by an SMO Evaluator on a District IA Evaluator, select SMO, not the Evaluatee's district.

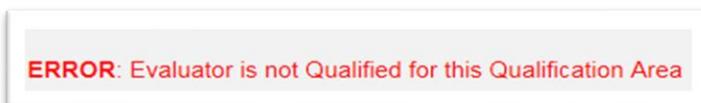
8. **Lab Being Evaluated** – enter the Laboratory where the technician is located. If there is a failing test step on an equipment checklist, it will generate an LQPR for this laboratory.

9. **Evaluator** – enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

A screenshot of a search result for an evaluator. It shows a text input field containing "Susan Musselman [M24578064]" with a red "x" icon to its right. To the right of the input field is a label "Is Evaluator Qualified?" and the value "No".

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:



10. **Technician Type** – select the Technician Type. This selection assigns the recipients when the QPR is generated.

a. Select IA if an SMO IA evaluator is evaluating another IA evaluator.

b. Select QC when the technician being evaluated only performs QC sampling and/or testing.

c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.

d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

11. **Technician** – enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

Technician Type	Technician	Is Technician Qualified?
QC	Susan Musselman [M24578064]	No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

12. **Technician's Email** – enter the technician's email address. This field may be populated by the information in the CTQP data. If the field is populated, verify that the information is correct and current. In many cases it is out of date.

13. **Supervisor's Email** – enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. If you don't know the emails, enter generic information in the fields and make a note to update the fields later when you evaluate the technician (see Chapter 5, [B. Updating Evaluation Emails](#)).

**Checklists**

Select All

- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Equipment]
- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Procedure]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Equipment]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Procedure]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Equipment]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 002 - Sampling Aggregates [Procedure]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75- $\mu$ m No. 200 Sieve [Equipment]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75- $\mu$ m No. 200 Sieve [Procedure]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Equipment]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Procedure]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Equipment]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Equipment]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Procedure]

14. Select the appropriate checklists. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

**Comment**

This is a comment on an evaluation that will not appear on the QPR.

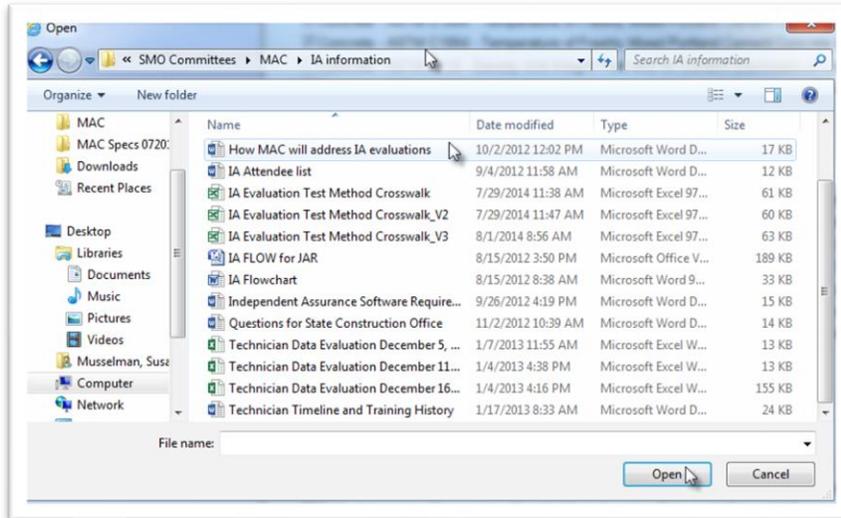
15. **Comments** – if desired, you can enter comments in the comments field. These will not appear on the QPR.

**Supporting Document**      **Description**

Select File      0 %      You may enter descriptive information about the attached document.

16. You may also attach a document to the evaluation.
- a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.



c. Navigate to the location where the document is stored.

d. Click on the document to select it.

e. Select the Open option to upload the document to the evaluation.

The document will appear as attached to the evaluation.

f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



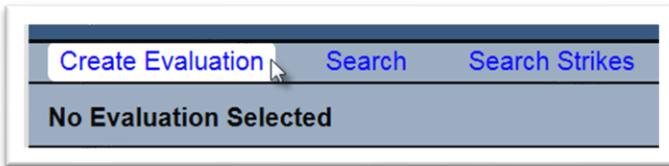
17. Select the Save option to create the evaluation.

## Chapter 4 – Creating an Observation Evaluation on a Field Qualification Area

To create an Observation evaluation on a field qualification area; for example, Concrete Field Level 1:

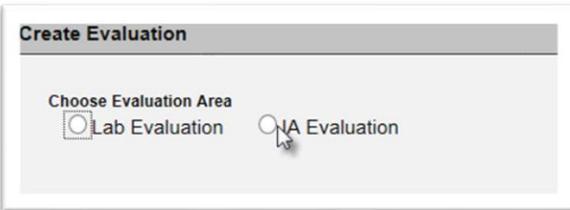


1. Select the Evaluations menu option.
2. Select the Evaluations submenu option.



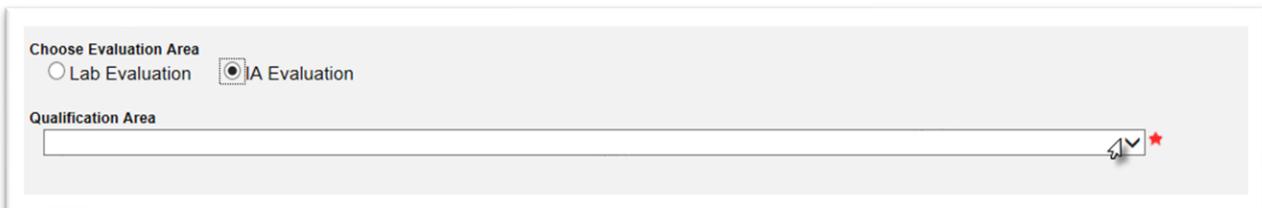
3. Select the Create Evaluation option.

A Create Evaluation dialog box will appear.



4. **Choose Evaluation Area** – select the IA Evaluation option.

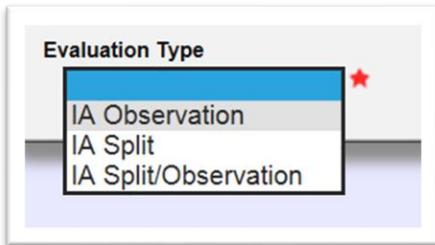
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. **Qualification Area** – select the appropriate qualification area from the dropdown list, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. See [Chapter 18 – Managing Strikes](#).

The Evaluation Type selection field will appear.



6. **Evaluation Type** – select the IA Observation option from the dropdown list.

A screenshot of a web form for an evaluation. The form includes several fields with numbered callouts: "Choose Evaluation Area" with radio buttons for "Lab Evaluation" and "IA Evaluation"; "Qualification Area" with a dropdown menu set to "Concrete Field Technician Level I"; "Evaluation Type" with a dropdown menu set to "IA Observation"; "Evaluation District" with a dropdown menu set to "7"; "Evaluator" with a search field containing "8"; "Technician Type" with a dropdown menu set to "9"; "Technician" with a search field containing "10"; "Technician's Email" with a text field containing "11"; and "Supervisor's Email" with a text field containing "12". Red stars are present next to the "Evaluation Type", "Evaluator", "Technician", "Technician's Email", and "Supervisor's Email" fields.

7. **Evaluation District** – enter the District of the Evaluator.

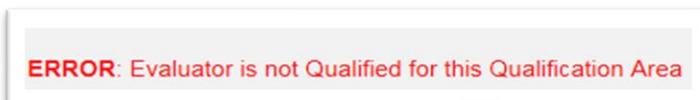
**NOTE:** If the evaluation is being performed by an SMO Evaluator on a District IA Evaluator, select SMO, not the Evaluatee's district.

8. **Evaluator** – enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

A screenshot of the "Evaluator" search field. The field contains the text "Susan Musselman [M24578064]". To the right of the field is a red "x" icon. Further right is the text "Is Evaluator Qualified?" followed by the word "No".

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

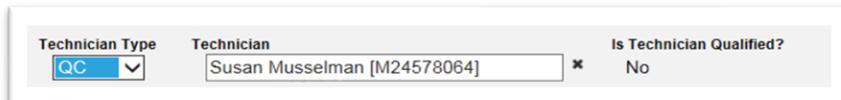


9. **Technician Type** – select the Technician Type. This selection assigns the recipients when the QPR is generated.

- a. Select IA if an SMO IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

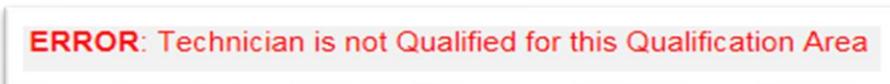
10. **Technician** – enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.



Technician Type	Technician	Is Technician Qualified?
QC	Susan Musselman [M24578064]	No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

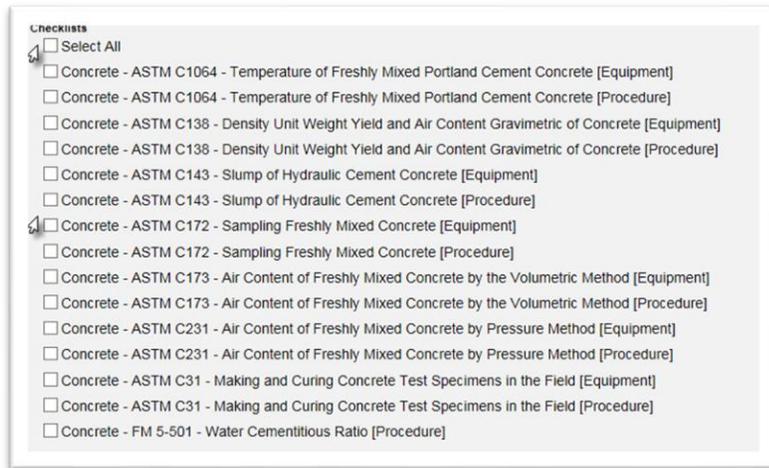


**ERROR: Technician is not Qualified for this Qualification Area**

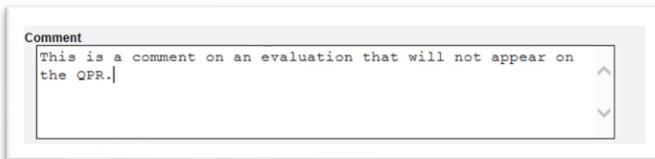
11. **Technician’s Email** – enter the technician’s email address. This field may be populated by the information in the CTQP data. If the field is populated, verify that the information is correct and current. In many cases it is out of date.

12. **Supervisor’s Email** – enter the technician’s supervisor’s email address.

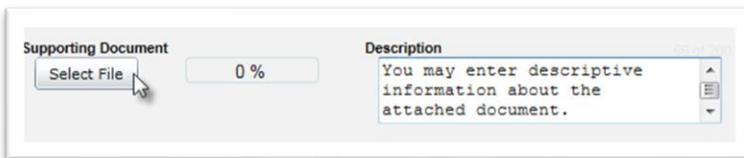
**NOTE:** Verify that the email information is correct and complete before saving the evaluation. If you don’t know the emails, enter generic information in the fields and make a note to update the fields later when you evaluate the technician (see Chapter 5, [B. Updating Evaluation Emails](#)).



13. Select the appropriate checklists from the master list. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

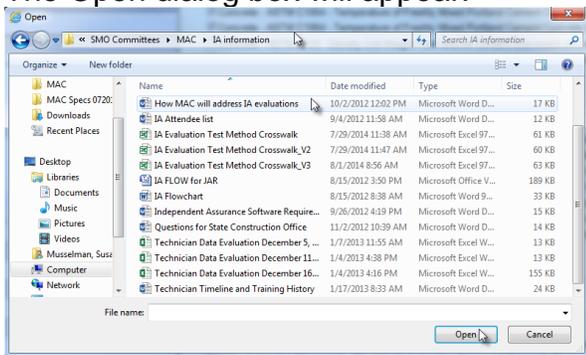


14. If desired, you can enter comments in the comments field. These will not appear on the QPR.



15. You may also attach a document to the evaluation.
- Type in a description of the document, if desired.
  - Click on the Select File option under Supporting Document.

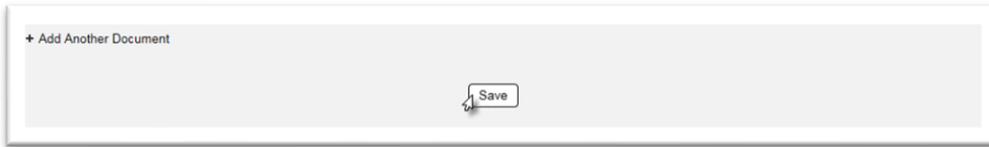
The Open dialog box will appear.



- Navigate to the location where the document is stored.
- Click on the document to select it.

e. Select the Open option to upload the document to the evaluation.  
The document will appear as attached to the evaluation.

f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.

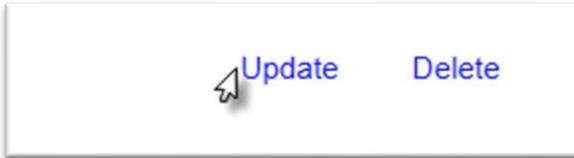


16. Select the Save option to create the evaluation.

## Chapter 5 – Performing an Observation Evaluation

### A. Updating an Observation Evaluation

Once an evaluation is created, you can update the evaluation record, if needed.



1. Select the Update option.

An Update dialog box will appear. You can update the Technician Type and the Qualification Area.

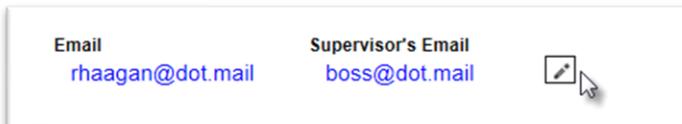


2. Update the fields as appropriate.
3. Select the Save option to save the updates.

**NOTE:** Some fields are not updateable. If you selected the wrong technician, you must delete the evaluation and reenter it with the correct technician. You must delete the evaluation with the incorrect TIN **before** generating the QPR.

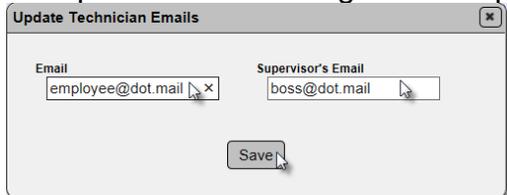
### B. Updating Evaluation Emails

To update the email information on an evaluation:



1. Select the Update Emails icon (✎).

An Update Emails dialog box will appear.



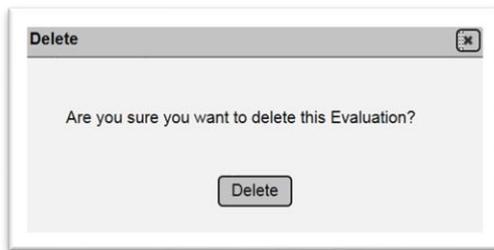
2. Update either or both emails.
3. Select Save to save the updated emails.

#### C. Deleting an Observation Evaluation



1. Select the Delete option.

A Delete dialog box will appear.

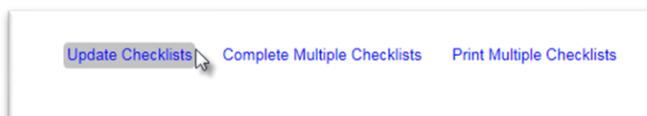


2. Select the Delete option to delete the evaluation record.

**NOTE: You cannot delete an evaluation record if you have generated a QPR.** This option will not appear after you generate the QPR ([Chapter 12 – Generating the Qualification Performance Report \(QPR\)](#)).

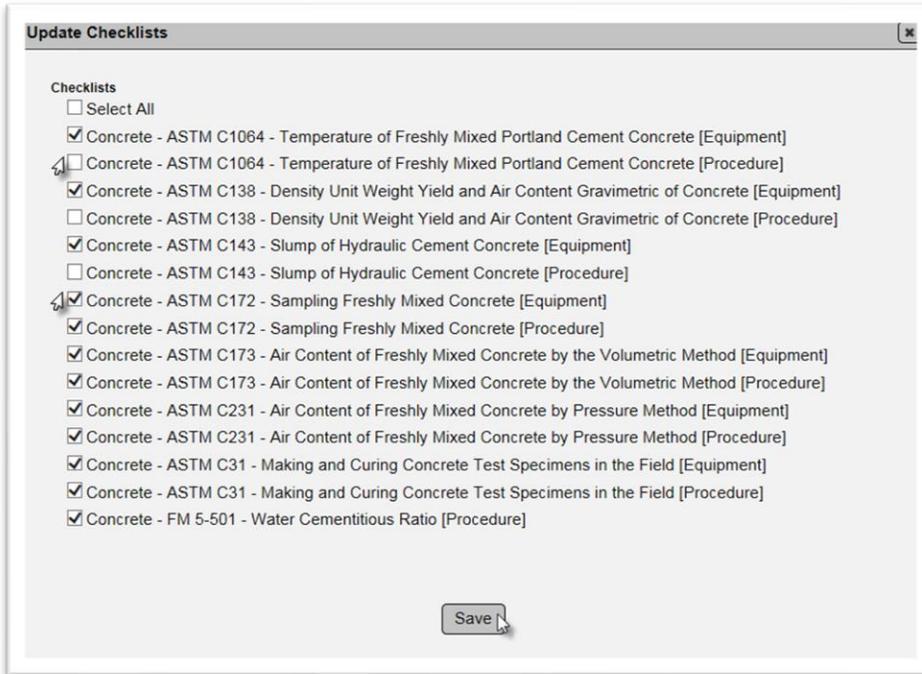
#### D. Updating the Checklists on an Evaluation

If you need to update the checklists assigned to the evaluation:



1. Select the Update Checklists option.

The Update Checklist dialog box will appear.



2. Assign missing checklists by clicking on the selection box next to the checklist title. Deselect checklists checked to remove them from the evaluation.
3. When complete, select the Save option to revise the checklists on the evaluation.

#### E. Performing a Single Checklist

The checklists on an evaluation may be completed individually or more than one at a time. To perform one of the checklists:

Concrete			
Temperature of Freshly Mixed Portland Cement Concrete	ASTM C1064	In Progress	<a href="#">Perform Checklist</a>
Density Unit Weight Yield and Air Content Gravimetric of Concrete	ASTM C138	In Progress	<a href="#">Perform Checklist</a>

1. Select the Perform Checklist option next to the specific checklist you wish to complete.

A Perform Checklist dialog box will appear.

Perform Checklist

ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]

		P	F	N/A
<b>Container</b>				
1.	Container shall be large enough to provide at least 3 inches [75 mm] of concrete in all directions around the sensor of the temperature measuring device; concrete cover must also be at least three times the nominal maximum size of the coarse aggregate.	✓	○	○
<b>Temperature Measuring Device</b>				
2.	Shall be capable of accurately measuring the temperature of freshly mixed concrete to $\pm 1^\circ\text{F}$ [ $\pm 0.5^\circ\text{C}$ ] throughout a range of $30^\circ$ to $120^\circ\text{F}$ [ $0^\circ$ to $50^\circ\text{C}$ ].	✓	○	○
3.	The design of the temperature measuring device shall be such that it allows 3 inches [75 mm] or more immersion during operation	✓	○	○
4.	Partial immersion liquid-in-glass thermometers and possibly other types shall have a permanent mark to which the device must be immersed without applying a correction factor.	✓	○	○
5.	Reference temperature measuring device shall be readable and accurate to $\pm 0.5^\circ\text{F}$ [ $0.2^\circ\text{C}$ ] at the verification points at two temperatures at least $30^\circ\text{F}$ [ $15^\circ\text{C}$ ] apart. A certificate or report that verifies the accuracy shall be available in the laboratory for review.	✓	○	○

**Remarks**  
This is a remark on a specific checklist. It will not appear on the QPR>

Date: 12/1/2015  
IA Observer: [Type Technician Name or TIN] \*

Save Submit

2. **P / F / N/A** – observe the technician performing each step.
  - a. If the technician successfully completes the step no action needs to be taken.
  - b. If the technician fails to successfully complete the step, change the step indicator from P to F.
  - c. If the step does not apply, change the step indicator from P to N/A.
3. **Remarks** – enter remarks in the remarks field, if desired. These do not show on the QPR.
4. **Date** – if the checklist is completed on a date different from the date the evaluation was generated, change the date to the appropriate date.
5. **IA Observer** – if the checklist is completed by a different IA Observer from the Evaluator, enter the Name or TIN of the IA Observer.
6. **Save or Submit**
  - a. **Save** – to save your work and return to the checklist at a later time, select the Save option. The checklist status will remain “In Progress”.
  - b. **Submit** – to complete the checklist and submit it for generating the QPR, select the Submit option.

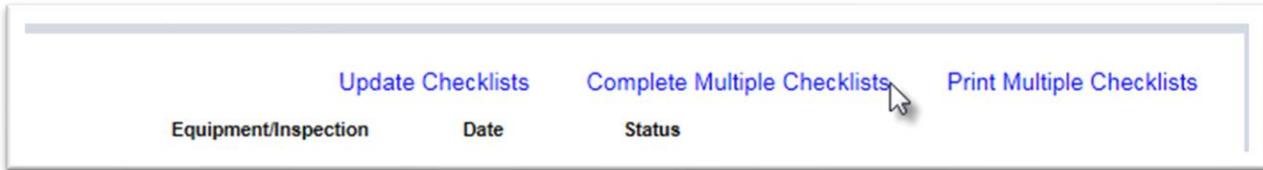
The checklist status will change to either “Passed” if all steps are P or P and N/A or “Failed” if any steps are failed.

If any required fields are missing and the Submit option is selected, you will be warned and the specific missing fields will be listed.

**ERROR: IA Observer is required**

## F. Completing Multiple Checklists

To complete more than one checklist at a time:

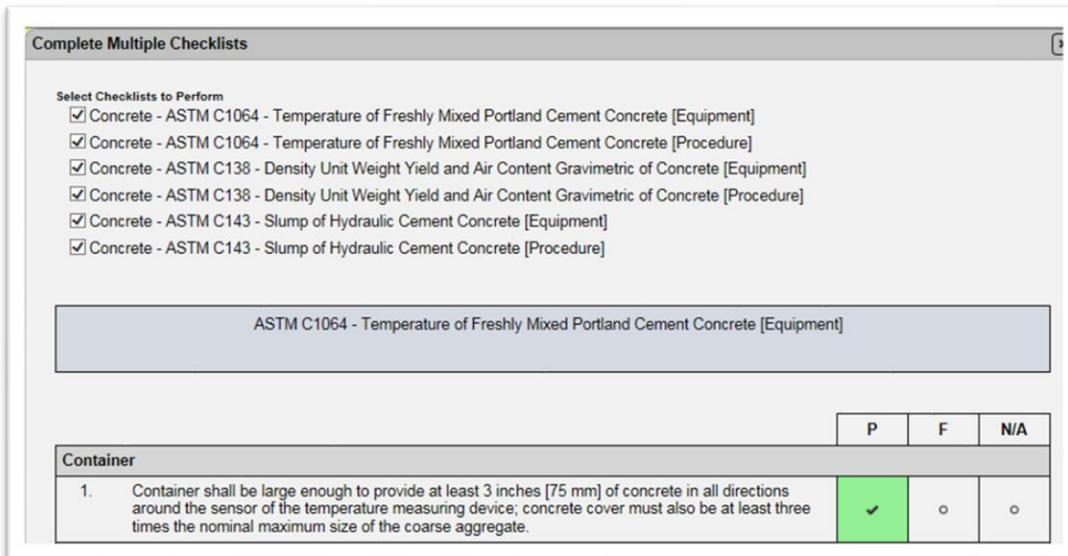


Update Checklists    Complete Multiple Checklists    Print Multiple Checklists

Equipment/Inspection    Date    Status

1. Select the Complete Multiple Checklists option.

A Complete Multiple Checklists dialog box will appear with all the checklists on the evaluation selected.



Complete Multiple Checklists

Select Checklists to Perform

- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Procedure]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Equipment]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Procedure]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Equipment]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Procedure]

ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]

	P	F	N/A
<b>Container</b>			
1. Container shall be large enough to provide at least 3 inches [75 mm] of concrete in all directions around the sensor of the temperature measuring device; concrete cover must also be at least three times the nominal maximum size of the coarse aggregate.	✓	○	○

2. If you are going to perform all checklists, leave all the boxes checked.

3. If you are not going to perform all checklists, deselect the checklists you are not going to perform. This may be due to another IA evaluator completing them or you will be returning the next day to complete them. Deselecting them here does not remove them from the evaluation, just from the available checklists for data entry at this time.

4. **P / F / N/A** – observe the technician performing each step on the first checklist.

a. If the technician successfully completes the step no action needs to be taken.

b. If the technician fails to successfully complete the step, change the step indicator from P to F.

c. If the step does not apply, change the step indicator from P to N/A.



Remarks

Date 12/1/2015    IA Observer Type Technician Name or \*

5. **Remarks** – enter remarks in the remarks field, if desired. These do not show on the QPR.

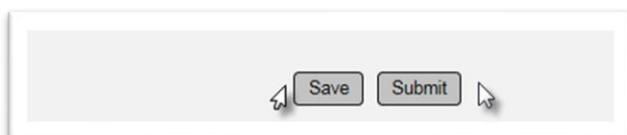
6. **Date** – if the date of the checklist is different from the date the evaluation was created, change the date field.
7. **IA Observer** – you must supply the IA observer on the first checklist. Enter the Name or TIN of the IA Observer.
8. Continue completing each checklist.



Use the Footer Info from First Checklist

Date 11/25/2014      IA Observer

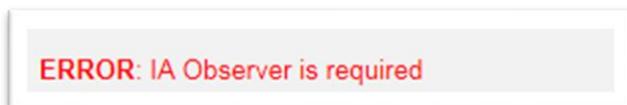
9. **Use the Footer from the First Checklist** – after the first checklist you have this option. If this box is selected the date and IA observer entered will be used on that checklist. If it is not, you will have to supply the IA Observer and the date. This is done when more than one IA Observer performs the same evaluation.



Save      Submit

10. Save or Submit
  - a. **Save** – to save your work and return to the checklist at a later time, select the Save option. The checklists statuses will remain “In Progress”.
  - b. **Submit** – to complete the checklists and submit them for generating the QPR, select the Submit option. The checklist statuses will change to either “Passed” if all steps are P or P and N/A or “Failed” if any steps are failed.

If any required fields are missing and the Submit option is selected, you will be warned and the specific missing fields will be listed.

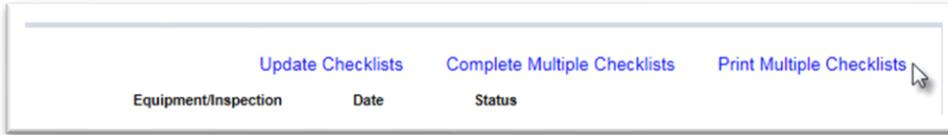


ERROR: IA Observer is required

**NOTE:** The Date field cannot be in a future date.

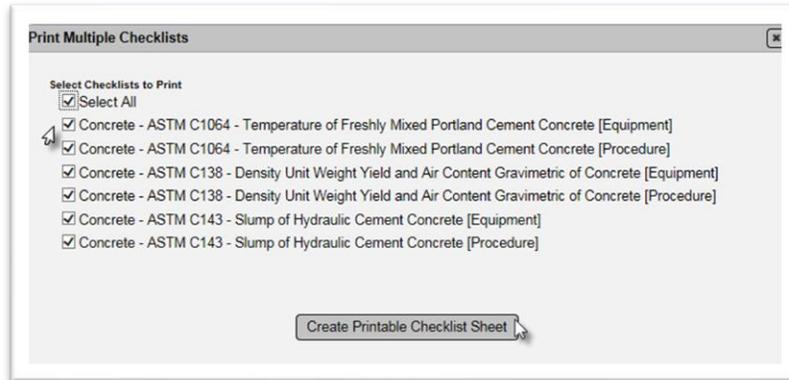
## G. Printing Multiple Checklists

You can print the checklists on an evaluation record if you need to perform the evaluation manually and enter the results in later.



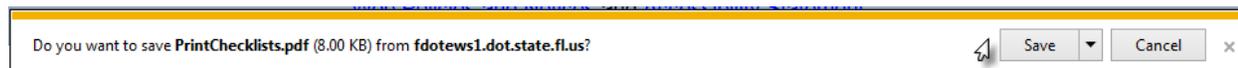
Select the Print Multiple Checklists option.

A Print Multiple Checklists dialog box will appear.



2. To print all the checklists on the inspection record, leave the checkboxes selected. To print only some of them, deselect the checklists you don't want to print.

3. Select the Create Printable Checklist Sheet option.



4. Select the Save option to save the download and open it.

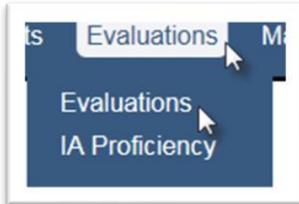


5. Select the Open option to open the printable hard copies in pdf format.

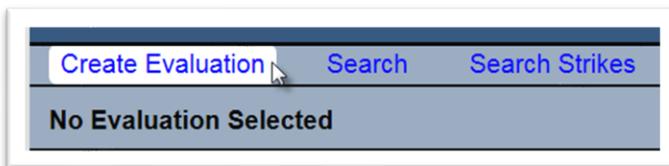
The reports will open in a program that will read pdf formats. You can print the reports by using the program's print function.

## Chapter 6 – Creating a Split Sample Evaluation on a Laboratory Qualification Area

To create a Split Sample evaluation on a laboratory qualification area; for example, Concrete Lab Level 1:

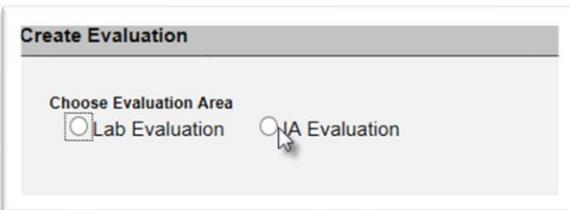


1. Select the Evaluations menu option.
2. Select the Evaluations submenu option.



3. Select the Create Evaluation option.

A Create Evaluation dialog box will appear.



4. **Choose Evaluation Area** – select the IA Evaluation option.

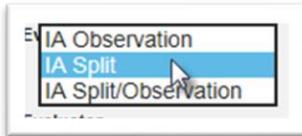
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. **Qualification Area** – select the appropriate qualification area from the dropdown list, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. See [Chapter 18 – Managing Strikes](#).

The Evaluation Type selection field will appear.



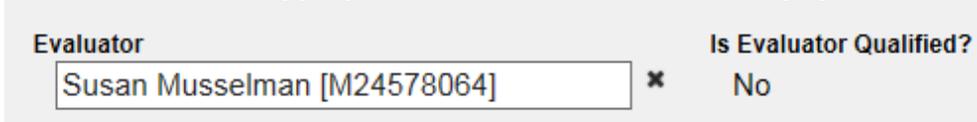
6. **Evaluation Type** – select the IA Split option from the dropdown list.



7. **Evaluation District** – enter the District of the Evaluator.

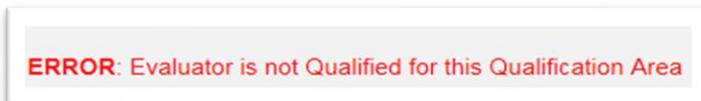
**NOTE:** If the evaluation is being performed by an SMO Evaluator on an IA Evaluator, make sure you select the Evaluation District of SMO, not the Evaluatee’s district.

8. **Evaluator** – enter the Evaluator’s name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.



MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:



9. **Evaluator’s Lab** – enter the Laboratory Id where the Evaluator will perform the Split Sample evaluation testing.



10. **Evaluator’s Company Different Than Lab’s** – after you type in the Evaluator’s Lab, an indicator for sample custody will appear.

If the IA Evaluator will be performing the testing at a Laboratory that does not belong to his company profile, select the Evaluator’s Company Different Than Lab’s indicator.

A new field will appear that will allow you to enter a company name.

The screenshot shows a form with the following fields:
 

- Evaluator:** Jason Thomas [T52043972] \*
- Evaluator Lab:** D02003 - District 2 Materials Office \*
- Evaluator's Company Different Than Lab's:**
- Evaluator's Company:** Start typing Company name 11 get a list of \*
- Is Evaluator Qualified?:** Yes

 A blue circle with the number 11 is placed over the 'Evaluator's Company' input field.

11. **Evaluator's Company** – enter the Evaluator's company name. This will transfer the sample custody from the company of the lab in field #9 to the company in this field. The appropriate lab id where the testing occurred will be on the sample, but a user in the Evaluator's company (not users in the laboratory's company) will have access to enter the results.

The screenshot shows a form with the following fields:
 

- Technician Type:** VT 12
- Technician:** [Redacted] 13 \*
- Technician Lab:** D03003 - District 3 Materials Office 14 \*
- Technician's Company Different Than Lab's:**  15
- Technician's Company:** Start typing Company name 16 get a list of \*
- Is Technician Qualified?:** No

 Blue circles with numbers 12, 13, 14, 15, and 16 are placed over their respective fields.

12. **Technician Type** – select the Technician Type. This selection assigns the recipients when the QPR is generated.

The screenshot shows a dropdown menu for 'Technician Type' with the following options:
 

- IA
- QC
- QC/VT
- VT

 The 'IA' option is currently selected.

- a. Select IA if an SMO IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

13. **Technician** – enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

The screenshot shows a form with the following fields:
 

- Technician Type:** QC
- Technician:** Susan Musselman [M24578064] \*
- Is Technician Qualified?:** No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

14. **Technician Lab** – enter the Laboratory Id where the evaluated technician will be testing for the Split Sample evaluation.

15. **Technician's Company Different Than Lab's** – after you type in the technician's Lab, an indicator for sample custody will appear. If the technician will be performing the testing at a Laboratory that does not belong to his company profile, select the Evaluator's Company Different Than Lab's indicator.

A new field will appear that will allow you to enter a company name.

16. **Technician's Company Name** – enter the Technician's company name. This will transfer the sample custody from the company of the lab in field #9 to the company in this field. The appropriate lab id where the testing occurred will be on the sample, but a user in the technician's company (not users in the laboratory's company) will have access to enter the results.

A screenshot of a web form with four fields. The first field is 'Technician's Email' with a blue circle '17' and a red asterisk. The second field is 'Supervisor's Email' with a blue circle '18' and a red asterisk. The third field is 'FDOT Sample Number' with a blue circle '19'. The fourth field is 'Test Method(s)' with a blue circle '20' and a red asterisk. The form is set against a light gray background.

17. **Technician's Email** – enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

18. **Supervisor's Email** – enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. If you don't know the emails, enter generic information in the fields and make a note to update the fields later when you evaluate the technician (see Chapter 5, [B. Updating Evaluation Emails](#)).

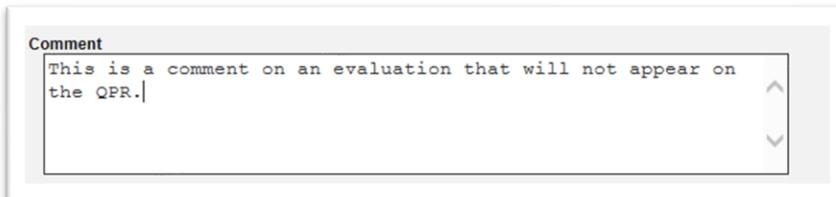
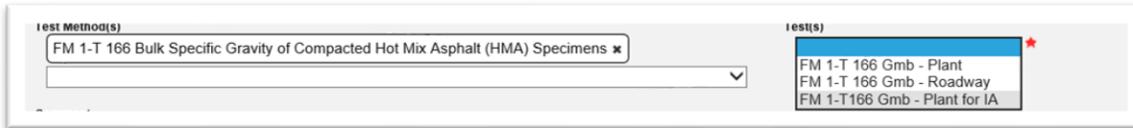
19. **FDOT Sample Number** – if there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.

20. **Test Method(s)** – select the test methods that will be evaluated by the Split Sample evaluation.

A screenshot of a dropdown menu for 'Test Method(s)'. The selected option is 'ASTM C1231 Use of Unbonded Caps in Determination of Compressive Strength of Hardened Concrete Cylinders \*'. Below it is another dropdown menu for 'Test(s)' with a blue circle '21' and a red asterisk.

21. **Test(s)** – select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

**NOTE:** In some cases, you may need to use a test definition created specifically for the IA program. The test definitions are normally designated as “for IA”. Contact the SMO IA Coordinator if you are not sure which test definition to use.

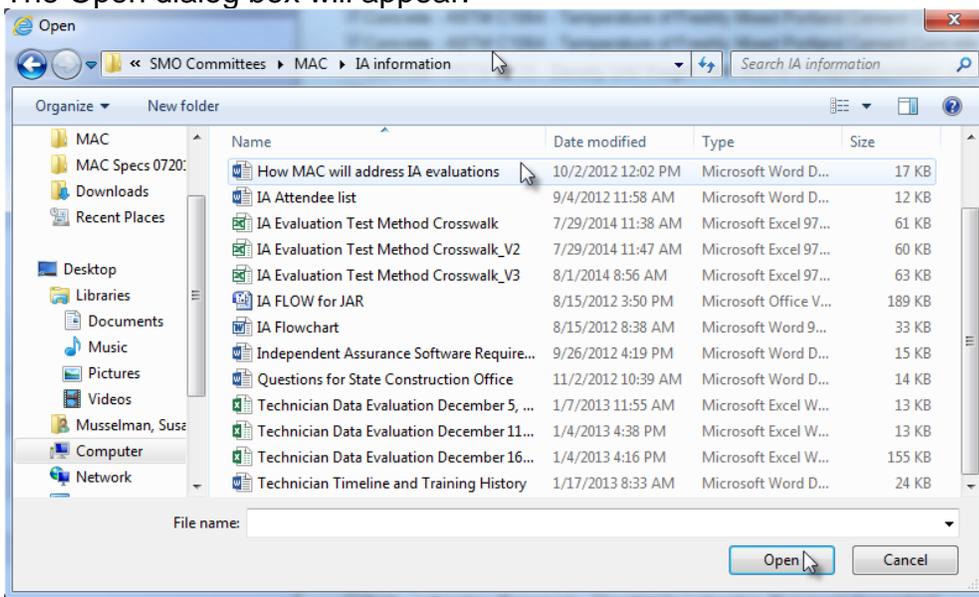


22. **Comment** – if desired, you can enter comments in the comments field. These will not appear on the QPR.



23. You may also attach a document to the evaluation.
- a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.



- c. Navigate to the location where the document is stored.
- d. Click on the document to select it.
- e. Select the Open option to upload the document to the evaluation.

The document will appear as attached to the evaluation.

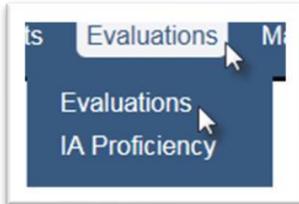
f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



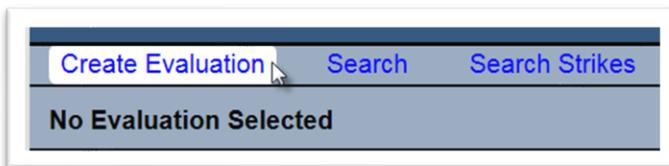
24. Select the Save option to create the evaluation.

## Chapter 7 – Creating a Split Sample Evaluation on a Field Qualification

To create a Split Sample evaluation on a field qualification area; for example, Concrete Field Level 1:

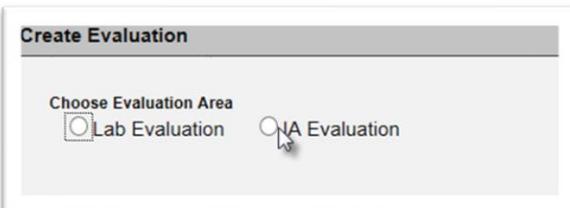


1. Select the Evaluations menu option.
2. Select the Evaluations submenu option on.



3. Select the Create Evaluation option.

A Create Evaluation dialog box will appear.



4. **Choose Evaluation Area** – select the IA Evaluation option.

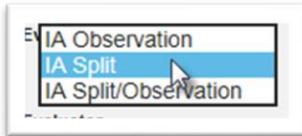
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. **Qualification Area** –to select the appropriate qualification area from the dropdown list, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. See [Chapter 18 – Managing Strikes](#).

The Evaluation Type selection field will appear.



6. **Evaluation Type** – select the IA Split option from the dropdown list.



7. **Evaluation District** – enter the District of the Evaluator.

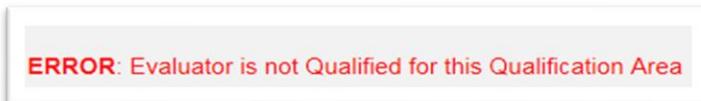
**NOTE:** If the evaluation is being performed by an SMO Evaluator on an IA Evaluator, make sure you select the Evaluation District of SMO, not the Evaluatee's district.

8. **Company** – enter the company name of the company that employs the evaluated technician.  
9. **Evaluator** – enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

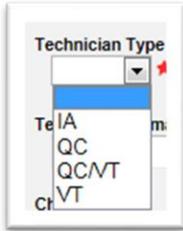


MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:



10. **Technician Type** – select the Technician Type. This selection assigns the recipients when the QPR is generated.



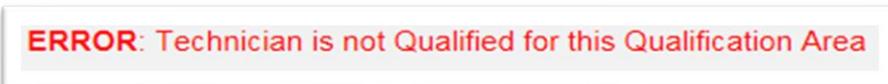
- a. Select IA if an SMO IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

11. **Technician** – enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.



**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:



12. **Technician's Email** – enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

13. **Supervisor's Email** – the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. If you don't know the emails, enter generic information in the fields and make a note to update the fields later when you evaluate the technician (see Chapter 5, [B. Updating Evaluation Emails](#)).

The screenshot shows a web form for sample evaluation. It includes the following fields and callouts:

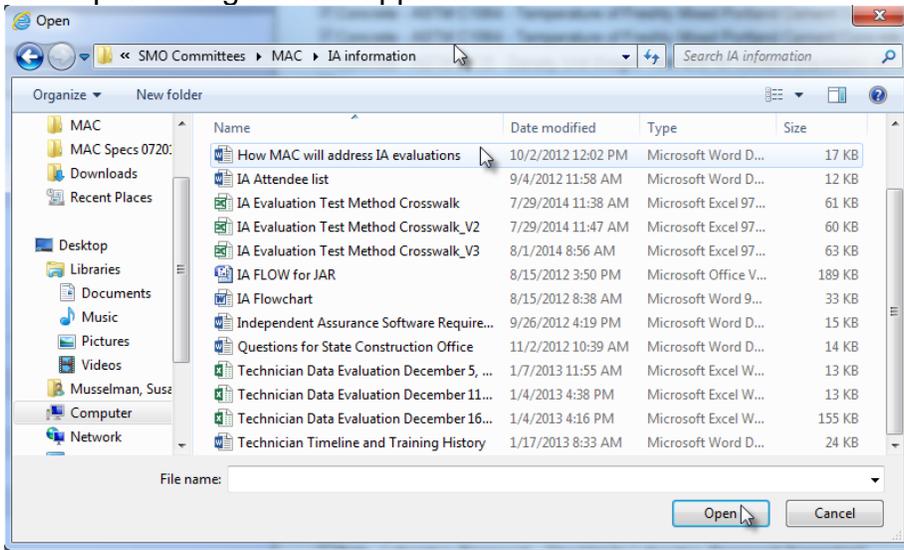
- 14:** DOT Sample Number (text input field)
- 15:** Test Method(s) (dropdown menu with two selected items: "ASTM C138 Density" and "ASTM C231 Air Content of Freshly Mixed Concrete by the Pressure Method")
- 16:** Test(s) (dropdown menu with one selected item: "ASTM C138 Density")
- 17:** Comment (text area)
- 18:** Supporting Document (file upload section with "Choose File" button, "No file chosen" text, and a "Description" dropdown menu)

At the bottom of the form is a "Save" button and a link that says "+ Add Another Document".

14. **FDOT Sample Number** – if there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.
15. **Test Method(s)** – select the test methods that will be evaluated by the Split Sample evaluation.
16. **Test(s)** – select the appropriate test definitions. This will assign the actual tests for data entry on the sample.
17. **Comment** – if desired, you can enter comments in the comments field. These will not appear on the QPR.

18. You may also attach a document to the evaluation.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.



c. Navigate to the location where the document is stored.

d. Click on the document to select it.

e. Select the Open option to upload the document to the evaluation.

The document will appear as attached to the evaluation.

f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



19. Select the Save option to create the evaluation.

## Chapter 8 – Performing a Split Sample Evaluation and Entering an Evaluator’s Sample

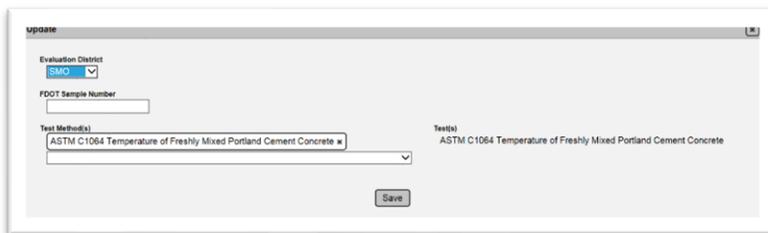
### A. Updating the Split Sampe Evaluation

Once an evaluation is created, you can update the evaluation record, if needed.



1. Select the Update option.

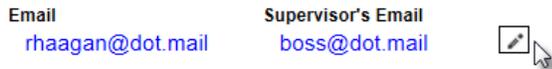
An Update dialog box will appear.



2. Update the fields as appropriate.
3. Select the Save option to save the updates.

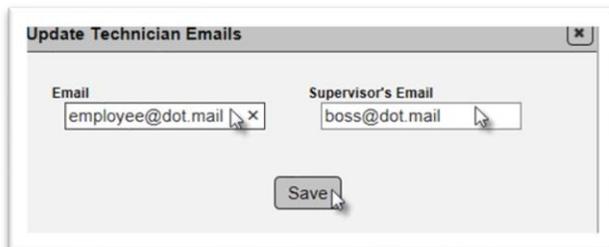
### B. Updating Evaluation Emails

To update the email information on an evaluation:



1. Select the Update Emails icon ( ).

An Update Emails dialog box will appear.



2. Update either or both emails.
3. Select Save to save the updated emails.

### C. Updating Sample Completed By Date

To update the Sample Completed By Date:



1. Select the Update Sample Completed by Date option.

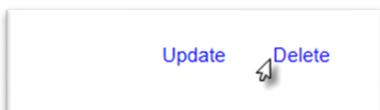
The Update Sample Completed by dialog box will appear.



2. **Sample Completed by Date** – set the deadline date the data entry person for the technician must enter the sample and test results. The date defaults to ten business days from the date the evaluation is created. The Sample Completed by Date can be revised until the QPR is generated. Once the QPR is generated, it will automatically fail and result in a strike.

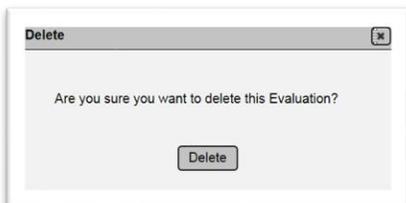
3. Select the Save option.

### D. Deleting an Observation Evaluation



1. Select the Delete option.

A Delete dialog box will appear.



2. Select the Delete option to delete the evaluation record.

**NOTE: You cannot delete an evaluation record if you have generated a QPR.** This option will not appear if you have generated the QPR ([Chapter 12 – Generating the Qualification Performance Report \(QPR\)](#)).

E. Entering the Evaluator’s Sample and Test Data

The evaluator can navigate directly to the Evaluator Sample from the Split Sample evaluation. For instructions on the technician sample, see the SMO MAC website Sample Life Cycle information ([IA Data Entry for Split Samples](#)).

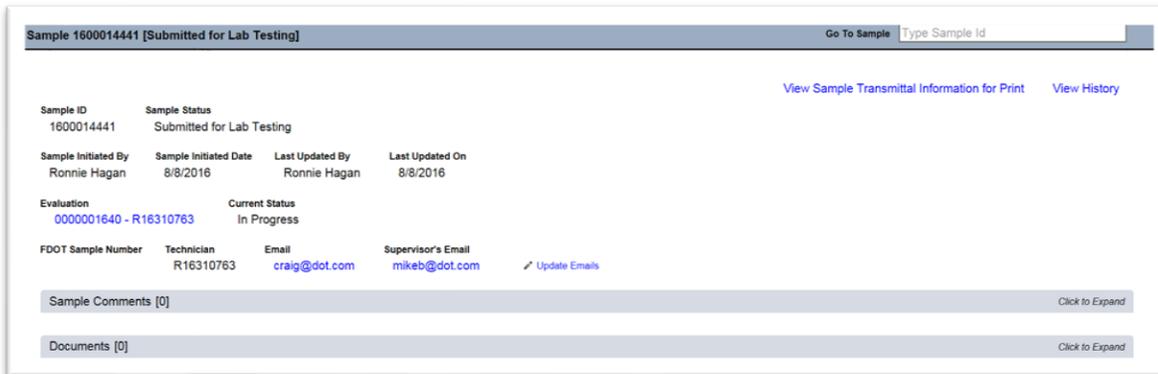
The IA Evaluator does **NOT** have to change from the system role of PMU to a company role to complete the data entry for the Evaluator’s sample. From the evaluation, you can navigate directly to the sample record and enter the sample data without changing roles.

To navigate to the Evaluator’s sample:

Concrete Field Technician Level I	VT	R16310763	Yes	<a href="#">craig@dot.com</a>	<a href="#">mikeb@do</a>
<b>FDOT Sample Number</b>	<b>Technician Sample</b>	<b>Evaluator Sample</b>	<b>Samples Complete</b>		
	<a href="#">1600014440 [Submitted for Lab Testing]</a>	<a href="#">1600014441 [Submitted for Lab Testing]</a>	8/22/2016		

1. Select the sample hotlink under the Evaluator Sample label.

You will be navigated to the sample screen for the evaluator’s sample.



The emails on the sample may be updated at this time. See [B. Updating Evaluation Emails](#).

2. If the sample is a lab sample, you must acknowledge receipt of the sample to proceed.



a. Click on the Laboratory Information tab to expand it.

Status	Type	Date Sample Received	Comment
Waiting on Receipt	Full		<a href="#">Acknowledge Sample Receipt</a>

b. Select the Acknowledge Sample Receipt option.

An Acknowledge Sample Receipt dialog box will appear.

3. **Date Received** – enter the date the sample was physically received.

4. **Comments** – enter any comments, if desired.

5. Select the Save option to acknowledge the sample was received.

The sample status will be updated to Submitted for Lab Testing.

6. To perform data entry for all or some of the tests, select the Perform Multiple Tests option.

A dialog box will appear with all the available tests.

a. If you don't want to perform a test at this time, deselect it from the list. Deselecting it here does not remove it from the sample, just from the data entry at this time.

AASHTO T 255 Total Moisture

Use Header Info from First Test

Tester	Testing Lab	Date Test Performed
D26017069	DSM001 - State Materials Office	

What is the tare weight? (lbs)  \*

What is the wet weight plus tare weight? (lbs)  \*

What is the dry weight plus tare weight? (lbs)  \*

Wet Weight (lbs)

Dry Weight (lbs)

Total Moisture (%)

Test Notes +

b. To perform the selected tests, enter the data in the test definition fields as appropriate.

c. When all the entries are complete, select the Save option.

Required [Perform Test](#) [Mark Test Not F](#)

7. To enter one test, select the Perform test option.

perform test

Test  
AASHTO T 21 Color

Tester	Testing Lab	Date Test Performed
P32017069	DSM001 - State Materials Office	<input type="text"/> *

Color  \*

Test Notes +

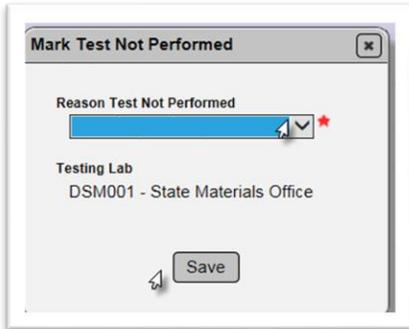
a. Enter the appropriate test data.

b. Select the Save option to save the test data.

Testing in Progress Required [Perform Test](#) [Mark Test Not Performed](#)

8. Select the Mark Not Test Performed option to indicate that a test was not performed.

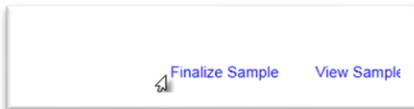
A Test Not Performed dialog box will appear.



- a. Select the reason the test was not performed from the dropdown list.
- b. Select the Save option.

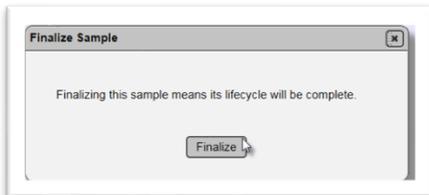
The test status will be updated to Test Not Performed with the reason selected.

9. When all the tests are completed or designated as not performed, the IA evaluator data entry person can finalize the sample.



- a. Review the data to ensure it is correct and complete. If not, make changes as needed.
- b. Select the Finalize Sample option to finalize the IA evaluator's sample.

A dialog box will appear notifying you that finalizing the sample will end the sample life cycle.



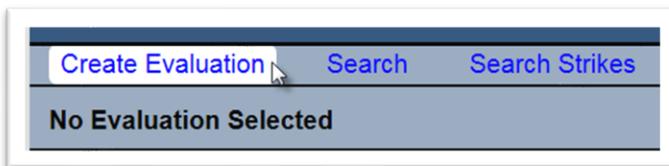
- c. Select the Finalize option to continue.

## Chapter 9 – Creating an Observation/Split Sample Evaluation on a Laboratory Qualification Area

To create an Observation/Split Sample evaluation on a laboratory qualification area; for example, Asphalt Plant Level 1:

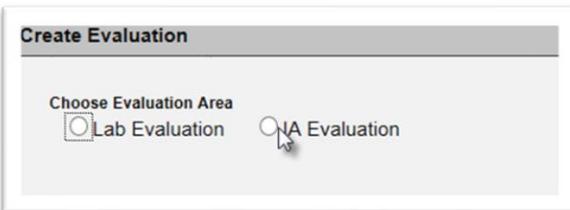


1. Select the Evaluations menu option.
2. Select the Evaluations submenu option.



3. Select the Create Evaluation option.

A Create Evaluation dialog box will appear.



4. **Choose Evaluation Area** – select the IA Evaluation option.

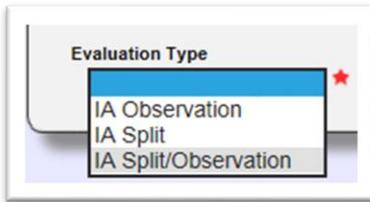
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



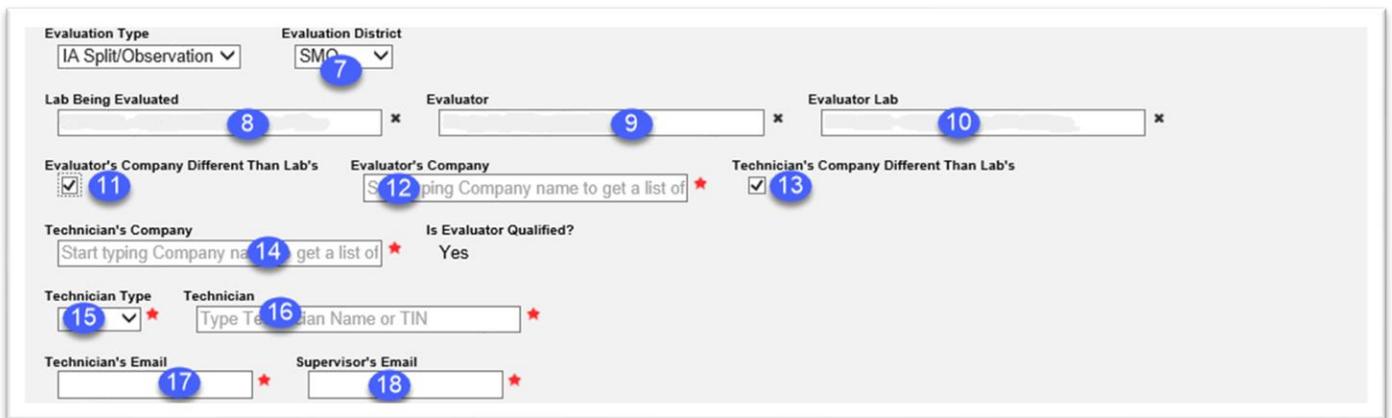
5. **Qualification Area** –to select the appropriate qualification area from the dropdown list, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. See [Chapter 18 – Managing Strikes](#).

The Evaluation Type selection field will appear.



6. **Evaluation Type** – select the IA Split/Observation option from the dropdown list.

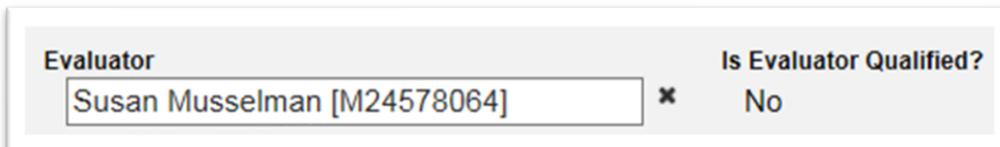
A screenshot of a web form for an evaluation. The form contains several fields and checkboxes, each with a blue numbered callout: 7 points to the 'Evaluation District' dropdown (set to 'SMC'); 8 points to the 'Lab Being Evaluated' text field; 9 points to the 'Evaluator' text field; 10 points to the 'Evaluator Lab' text field; 11 points to the 'Evaluator's Company Different Than Lab's' checkbox (checked); 12 points to the 'Evaluator's Company' text field; 13 points to the 'Technician's Company Different Than Lab's' checkbox (checked); 14 points to the 'Technician's Company' text field; 15 points to the 'Technician Type' dropdown; 16 points to the 'Technician' text field; 17 points to the 'Technician's Email' text field; and 18 points to the 'Supervisor's Email' text field. Red asterisks are present next to several fields.

7. **Evaluation District** – enter the District of the Evaluator.

**NOTE:** If the evaluation is being performed by an SMO Evaluator on an IA Evaluator, make sure you select the Evaluation District of SMO, not the Evaluatee's district.

8. **Lab Being Evaluated** – enter the Laboratory Id where the technician will perform the testing and the evaluation is located. If there is a failing test step on an equipment checklist, it will generate an LQPR for this laboratory.

9. **Evaluator** – enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

A screenshot of a web form section for the 'Evaluator' field. The text 'Susan Musselman [M24578064]' is entered in the text field. To the right of the field is a red asterisk and a checkbox labeled 'Is Evaluator Qualified?' which is currently unchecked and has the text 'No' below it.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR:** Evaluator is not Qualified for this Qualification Area

10. **Evaluator Lab** – enter the Laboratory Id where the Evaluator will perform the testing.

11. **Evaluator's Company Different than Lab's** – after you type in the Evaluator's Lab, an indicator for sample custody will appear. If the IA Evaluator will be performing the testing at a Laboratory that does not belong to his company profile, select the Evaluator's Company Different Than Lab's indicator.

A new field will appear that will allow you to enter a company name.

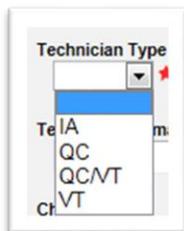
12. **Evaluator's Company** – enter the Evaluator's company name. This will transfer the sample custody from the company of the lab in field #9 to the company in this field. The appropriate lab id where the testing occurred will be on the sample, but a user in the Evaluator's company (not users in the laboratory's company) will have access to enter the results.

13. **Technician's Company Different than Lab's** – after you type in the technician's Lab, an indicator for sample custody will appear. If the technician will be performing the testing at a Laboratory that does not belong to his company profile, select the Evaluator's Company Different Than Lab's indicator.

A new field will appear that will allow you to enter a company name.

14. **Technician's Company** – enter the Technician's company name. This will transfer the sample custody from the company of the lab in field #9 to the company in this field. The appropriate lab id where the testing occurred will be on the sample, but a user in the technician's company (not users in the laboratory's company) will have access to enter the results.

15. **Technician Type** – select the Technician Type. This selection assigns the recipients when the QPR is generated.



- a. Select IA if an SMO IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

16. **Technician** – enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

Technician Type	Technician	Is Technician Qualified?
QC	Susan Musselman [M24578064]	No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

17. **Technician's Email** – enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

18. **Supervisor's Email** – enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. If you don't know the emails, enter generic information in the fields and make a note to update the fields later when you evaluate the technician (see Chapter 5, [B. Updating Evaluation Emails](#)).

Checklists

Select All

- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Equipment]
- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Procedure]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Equipment]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Procedure]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Equipment]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 002 - Sampling Aggregates [Procedure]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75-µm No. 200 Sieve [Equipment]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75-µm No. 200 Sieve [Procedure]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Equipment]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Procedure]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Equipment]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Equipment]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Procedure]

19. Select the appropriate checklists from the master list. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

FDOT Sample Number **20**

Test Method(s) **21**  
 ASTM C1231 Use of Unbonded Caps in Determination of Compressive Strength of Hardened Concrete Cylinders x

Test(s) **22**

Comment **23**

Supporting Document **24**  
 Choose File to file chosen

Description ?

20. **FDOT Sample Number** – if there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.
21. **Test Method(s)** – select the test methods that will be evaluated by the Split Sample evaluation.
22. **Test(s)** – select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

Comment

This is a comment on an evaluation that will not appear on the QPR.

23. **Comment** – if desired, you can enter comments in the comments field. These will not appear on the QPR.

Supporting Document

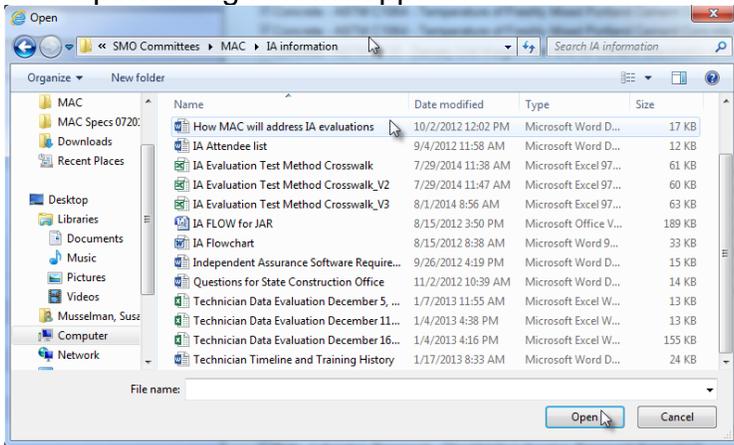
Select File 0 %

Description

You may enter descriptive information about the attached document.

24. You may also attach a document to the evaluation.
- Type in a description of the document, if desired.
  - Click on the Select File option under Supporting Document.

The Open dialog box will appear.



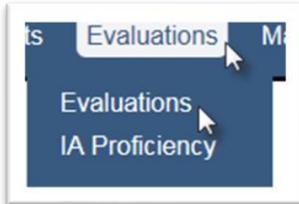
- c. Navigate to the location where the document is stored.
- d. Click on the document to select it.
- e. Select the Open option to upload the document to the evaluation.  
The document will appear as attached to the evaluation.
- f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



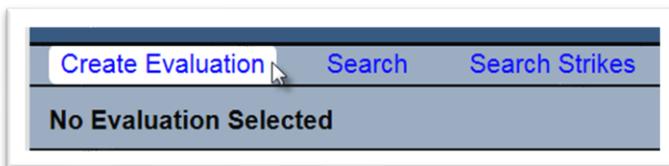
25. Select the Save option to create the evaluation.

## Chapter 10 – Creating an Observation/Split Sample Evaluation on a Field Qualification Area

To create an Observation/Split Sample evaluation on a field qualification area; for example, Asphalt Roadway Level 1:

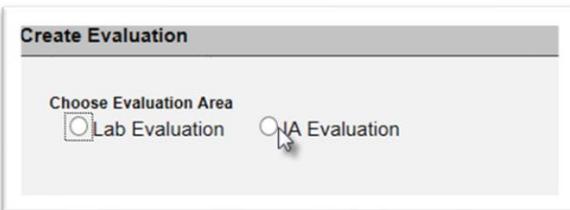


1. Select the Evaluations menu option.
2. Select the Evaluations submenu option.



3. Select the Create Evaluation option.

A Create Evaluation dialog box will appear.



4. **Choose Evaluation Area** – select the IA Evaluation option.

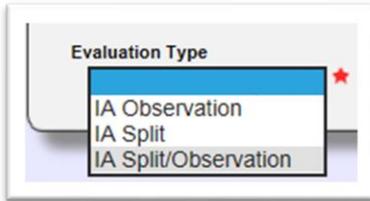
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. **Qualification Area** –to select the appropriate qualification area from the dropdown list, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. See [Chapter 18 – Managing Strikes](#).

The Evaluation Type selection field will appear.



6. **Evaluation Type** – select the IA Split/Observation option from the dropdown list.

A screenshot of a web form for evaluation. The form includes several fields with numbered callouts: 1. "Choose Evaluation Area" with radio buttons for "Lab Evaluation" and "IA Evaluation" (selected). 2. "Qualification Area" dropdown menu showing "Concrete Field Technician Level I". 3. "Evaluation Type" dropdown menu showing "IA Split/Observation" (callout 8). 4. "Evaluation District" dropdown menu showing "7" (callout 7). 5. "Company" search field with "Start typing C" and "ny name to get a list of" (callout 8). 6. "Evaluator" search field with "Type Tech" and "Name or TIN" (callout 9). 7. "Technician Type" dropdown menu showing "10" (callout 10). 8. "Technician" search field with "Type Technician Name" and "TIN" (callout 11). 9. "Technician's Email" field (callout 12). 10. "Supervisor's Email" field (callout 13). Red asterisks are present next to several fields.

7. **Evaluation District** – enter the District of the Evaluator.

**NOTE:** If the evaluation is being performed by an SMO Evaluator on an IA Evaluator, make sure you select the Evaluation District of SMO, not the Evaluatee's district.

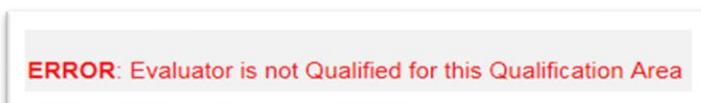
8. This field is the Technician's Sample Company. Enter the company name of the company that employs the evaluated technician.

9. **Evaluator** – enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

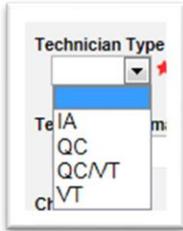
A screenshot of the "Evaluator" search results. The search field contains "Susan Musselman [M24578064]". To the right of the search field is a table with two columns: "Evaluator" and "Is Evaluator Qualified?". The row for "Susan Musselman [M24578064]" shows "No" in the "Is Evaluator Qualified?" column. A red asterisk is next to the search field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:



10. **Technician Type** – select the Technician Type This selection assigns the recipients when the QPR is generated.



- a. Select IA if an SMO IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

11. **Technician** – enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

A screenshot of a form section. On the left, there is a dropdown menu labeled "Technician Type" with "QC" selected. To its right is a search field labeled "Technician" containing the text "Susan Musselman [M24578064]". To the right of the search field is a small red asterisk icon. Further right is a label "Is Technician Qualified?" with the value "No" displayed below it.

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

12. **Technician's Email** – enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

13. **Supervisor's Email** – the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. If you don't know the emails, enter generic information in the fields and make a note to update the fields later when you evaluate the technician (see Chapter 5, [B. Updating Evaluation Emails](#)).

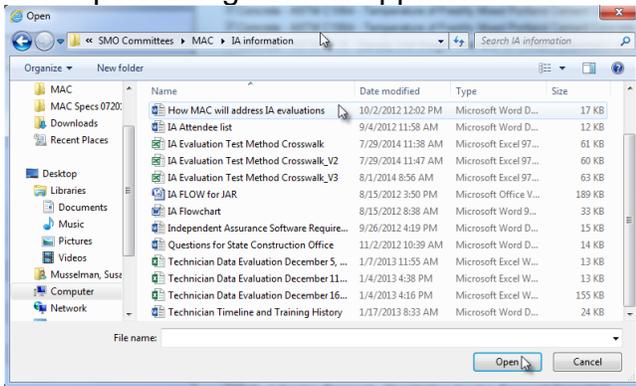
14. Select the appropriate checklists. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

15. **FDOT Sample Number** – if there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.  
 16. **Test Method(s)** – select the test methods that will be evaluated by the Split Sample evaluation.  
 17. **Test(s)** – select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

18. **Comment** – if desired, you can enter comments in the comments field. These will not appear on the QPR.

19. You may also attach a document to the evaluation.  
 a. Type in a description of the document, if desired.  
 b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.



- c. Navigate to the location where the document is stored.
  - d. Click on the document to select it.
  - e. Select the Open option to upload the document to the evaluation.
- The document will appear as attached to the evaluation.
- f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



20. Select the Save option to create the evaluation.

## Chapter 11 – Performing an Observation/Split Sample Evaluation

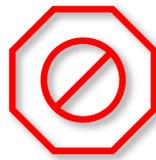
Performing the Observation/Split Sample evaluation is a combination of the functions for the Observation evaluation and the Split Sample evaluation. Follow the instructions in [Chapter 5 – Performing an Observation Evaluation](#). Follow the Split Sample Instructions in [Chapter 8 – Performing a Split Sample Evaluation and Entering an Evaluator’s Sample](#).

## Chapter 12 – Generating the Qualification Performance Report (QPR)

For Observation and Observation/Split Sample evaluations, when all the checklists are submitted and have a status of either Pass or Fail, you will see an option to generate the Qualification Performance Report (QPR). For Split Sample evaluations, when both samples are finalized or the Sample Completed By Date has passed, you will see an option to generate the QPR.

If the evaluation is for a laboratory qualification and it includes equipment failures, you will be generating a QPR and an LQPR at the same time.

### A. Generating the QPR

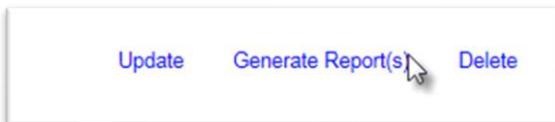


# STOP

## Do NOT generate the QPR until you have confirmed all the data is correct and complete

**NOTE: Once a QPR is generated it CANNOT be deleted. Some key fields cannot be updated. Make sure all data is correct before you generate the QPR. If incorrect data cannot be updated, the evaluation needs to be deleted and reentered with the corrected data. This cannot be done once the QPR is generated.**

1. Select the Generate Report(s) option.



The Generate Report(s) dialog box will appear.

generate report(s)

Lab Being Evaluated  
LAB-DSM001 - State Materials Office

Technician  
Technician's TN

QPR distribution list

Recipients

<input checked="" type="checkbox"/> Technician	Technician's Name	<a href="mailto:tschemail@email.com">tschemail@email.com</a>
<input checked="" type="checkbox"/> Technician's Supervisor	Boss Name	<input type="text" value="bossemail@email.com"/>
<input type="checkbox"/> QC Manager	QC Manager Name	<a href="mailto:qcmoremail@email.com">qcmoremail@email.com</a>
<input type="checkbox"/> Resident Engineer	RE Name	<a href="mailto:resengemail@email.com">resengemail@email.com</a>
<input type="checkbox"/> District Materials and Research Engineer (DMRE)	DMRE Name	<a href="mailto:dmreemail@email.com">dmreemail@email.com</a>
<input type="checkbox"/> District Construction Engineer (DCE)	DCE Name	<a href="mailto:dceemail@email.com">dceemail@email.com</a>
<input checked="" type="checkbox"/> Other	Other Name	<input type="text" value="otheremail@email.com"/>

+ Add Recipient

Comment  
This is the comments section. The comments entered here will appear on the QPR.

Attachment  
Select File 0 % Description

LQPR distribution list

Recipients

<input type="checkbox"/> Lab Manager	Lab Manager's Name	<a href="mailto:labmngemail@email.com">labmngemail@email.com</a>
<input checked="" type="checkbox"/> Contact Person	Contact Person's Name	<a href="mailto:contactemail@email.com">contactemail@email.com</a>
<input type="checkbox"/> Other		

+ Add Recipient

Comment  
This comment will appear on the LQPR. It will not appear on the QPR for the technician.

Attachment  
Select File 0 % Description

Generate

Resident Engineer

2. Complete the QPR distribution list. The distribution list is generated by the Technician Type selection on the evaluation. It may be overridden by deselecting the checkbox next to the title.

Other Other Name

+ Add Recipient

3. If there are additional recipients, the Other field may be used to add the name and email of the recipient.

4. If more than one Other recipient is needed, click on the + next to the Add Recipient option to provide additional fields for names and emails.

**Comment**

This is the comments section. The comments entered here will appear on the QPR.

5. **Comment** – enter comments that you want to include in the QPR in this comments section. The comments you entered on the checklist(s) will not appear on the QPR. Only the comments entered in this comment field will appear on the QPR.

**Attachment**      **Description**

Select File      0 %

6. If you would like to include an attachment to the QPR, use the Select File option to navigate to the document and the Description field, desired.

**LQPR distribution list**

**Recipients**

<input checked="" type="checkbox"/>	Lab Manager	Butch Hines	<a href="mailto:butch.hines@dot.state.fl.us">butch.hines@dot.state.fl.us</a>
<input checked="" type="checkbox"/>	Contact Person	Butch Hines	<a href="mailto:butch.hines@dot.state.fl.us">butch.hines@dot.state.fl.us</a>
<input type="checkbox"/>	Other		

+ Add Recipient

7. If the qualification area includes a Lab Id, an LQPR will also be generated. Complete the LQPR recipients.

**Comment** 87 of 2000

This comment will appear on the LQPR. It will not appear on the QPR for the technician.

8. **Comments** – enter comments that you want to include in the LQPR in this comments section.

Attachment	Description
Select File	0 %

9. If you would like to include an attachment to the LQPR, use the Select File option to navigate to the document and the Description field, desired.

Generate

10. To generate the QPR and LQPR (if applicable) and send to designated recipients, select the Generate option.

B. Viewing a QPR

**NOTE: DO NOT** use the Open Evaluation option to view the QPR.

Resend Report(s)    Open Evaluation

Evaluation District    Evaluator

Once the QPR has been generated and sent to the email addresses on the distribution list, you may view it.

Evaluation Status	Date	QPR Status	QPR	LQPR Status	LQPR	Previously Generated Reports	Attachments
Progress	11/17/2014						
Report Generated	11/17/2014	Satisfactory	11/17/2014	Not Required			
Progress	11/17/2014						

1. Select a specific QPR by clicking on the date the QPR was issued.

A dialog box will appear to generate or save the report.

2. Select the Open option to view the report as a pdf.

Do you want to open or save QPR.pdf (29.1 KB) from fdotews1.dot.state.fl.us?

Open    Save    Cancel

The Report will appear.

The screenshot shows a QPR form with the following details:

- MAC Evaluation ID:** 000000061
- Evaluation Type:** IA Observation
- Tech Name:** Technician's name
- Date(s) of Evaluation:** 11/25/2014
- Evaluation Status:** Unsatisfactory
- Qualification Area Reviewed:** Concrete Laboratory Technician Level I and Level II

Checklist results:

- Checklist: ASTM C1231** FAILED  
Failed Step - 6 The inside diameter of the retaining ring shall not be less than 102 % or greater than 107 % of the diameter of the cylinder.
- Checklist: ASTM C31** PASS
- Checklist: ASTM C31** PASS
- Checklist: ASTM C39** PASS

Comments: This is the comments section. The comments entered here will appear on the QPR.

Evaluation Summary:  
Was Sampling, Testing and/or Reporting demonstrated according to qualification standards? No, evaluation unsatisfactory.  
If results were unsatisfactory, this evaluation resulted to: STRIKE 1  
If strike 1 or 2, results were documented.  
If strike 3, written summary of evaluations were sent to District Material Engineer for disposition.

Signature of Independent Assurance Evaluator/Observer: Craig Roberts  
Date Approved: November 25, 2014

cc: Technician, Technician's Supervisor, Other, Technician's name, Boss Name, Other Name

Checklists with all steps passing will only have the checklist title and the status of PASS. Checklists with any failing steps will appear with a status of FAILED and the actual failing steps will be listed under the checklist title.

The comments entered on the QPR Generate Report(s) comment box will also appear on the QPR.

### C. Resending an Existing QPR

If you missed a recipient or made an error in a recipient's email, use the Resend option to resend the QPR. This resends the QPR as is without any changes to the report or evaluation.



1. Select the Resend Report(s) option.

A Resend Reports dialog box will appear.

Resend Report(s)

Lab Being Evaluated      Technician

QPR distribution list

Recipients

- Technician
- Technician's Supervisor
- QC Manager
- Resident Engineer
- District Materials and Research Engineer (DMRE)
- District Construction Engineer (DCE)
- Other

+ Add Recipient

WARNING: This Evaluation will automatically fail and generate strikes since the Samples Completed By Date has passed. If you do not want this to happen, cancel this action and update the Samples Completed By Date first. ✖

Generate

2. Make changes to the distribution list as needed.
3. Select the Generate option to resend the existing report.

**NOTE:** Pay attention to warnings when resending the report. This Evaluation was successful, but because the Resend option was selected after the Sample Completed by Date, the technician will receive a strike. Dismiss the message. Close the Resend Report option. Update the Date Samples Completed By Date before resending the QPR.

#### D. Revising an Existing QPR

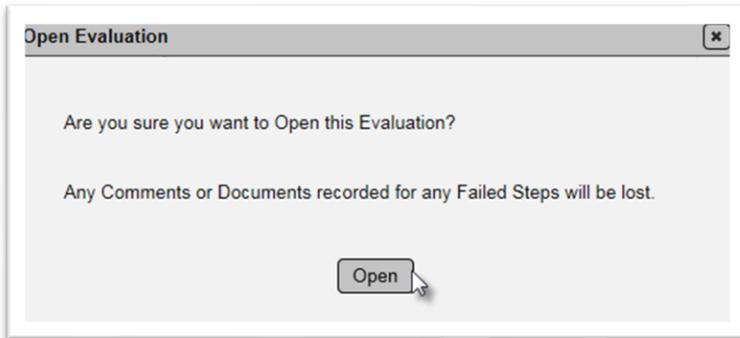
Once you have generated the QPR, MAC will distribute it to the recipients. If the report needs to be revised for any reason, the QPR must be regenerated and redistributed so that the original recipients have the latest version of the report.

**NOTE:** Once a QPR is generated, it CANNOT be deleted. There are certain fields that are not currently open for revision. Do NOT select the Open Evaluation option unless you need to revise the QPR after it has been generated. To view a generated QPR without revising it, see [B. Viewing a QPR](#).

Resend Report(s)      Open Evaluation

1. Select the Open Evaluation option.

A warning dialog box will appear. The intent of this message is to inform you that if you made comments or attached any documents in the Generate Report(s) for the original QPR, they will be lost. You must reenter them or reattach them if they still apply. **This is a reminder that you are revising an existing official record that has already been generated and sent.**



2. If you are sure you need to revise the QPR, select Open.

The evaluation returns to a status of “In Progress”.

3. Make changes to checklists, etc. to revise the evaluation.

4. When you have completed all the revisions, select the Submit option.



5. Select the Generate Report(s) option to generate the revised QPR.

The Generate Report(s) dialog box will appear.

6. Complete the dialog box as described in [A. Generating the QPR](#). If there were comments or documents on the original report and they still apply you must reenter them.

The new report will be listed in the Report History tab.

7. Click on the Report History tab to expand it.

8. Select the revised report by clicking on the date.

Evaluation Status	Date	QPR Status	QPR	LQPR Status	LQPR	Previously Generated Reports	Attachments
In Progress	11/26/2014						
Report Generated	11/26/2014	Unsatisfactory	<a href="#">11/26/2014</a>	Not Required			<a href="#">DRAFT IA FLOW for JAR-2.pdf</a>
In Progress	11/26/2014						
Report Generated	11/26/2014	Unsatisfactory	<a href="#">11/26/2014</a>	Not Required			

The report will be downloaded.

9. Select Open to view the revised report.

The report header will reflect the QPR is revised.

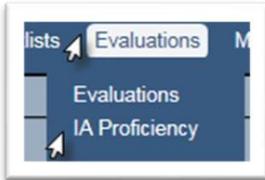
		STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION QUALIFICATION PERFORMANCE REPORT		(Revised)
MAC Evaluation ID:	000000101	Evaluation Type:	IA Observation	
Tech Name:				
Active in District:				
Date(s) of Evaluation:	11/26/2014	Qualification Area Reviewed:	Concrete Field Technician Level I	
Evaluation Status:	Unsatisfactory			
Checklist: ASTM C1064				PASS
Checklist: ASTM C1064				FAILED

## Chapter 13 – Creating a Proficiency Sample Evaluation by the State Materials Office

The SMO is responsible for initiating the Proficiency Sample evaluation packages. MAC is designed so that all the samples in an evaluation are packaged together. This is so that the samples can be analyzed together.

### A. Creating the Proficiency Sample Package

To create a Proficiency Sample Evaluation package:

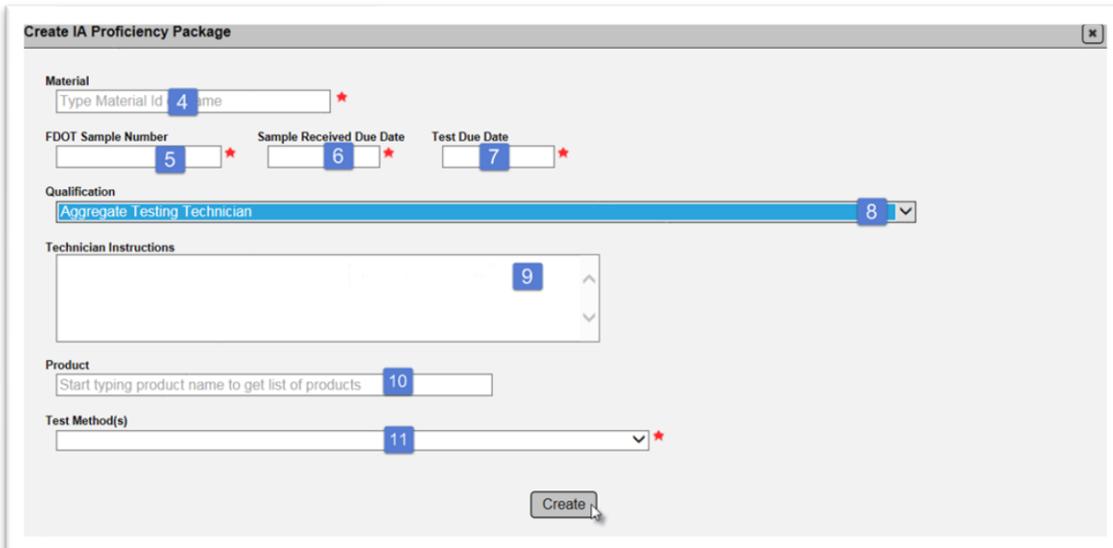


1. Select the Evaluations menu option.
2. Select the IA Proficiency option.



3. Select the Create IA Proficiency Package option.

A Create IA Proficiency Package dialog box appears.

A screenshot of the 'Create IA Proficiency Package' dialog box. It contains several input fields and a dropdown menu. The fields are: 'Material' (with a sub-label 'Type Material Id'), 'FDOT Sample Number', 'Sample Received Due Date', 'Test Due Date', 'Qualification' (with a dropdown menu), 'Technician Instructions' (with a text area), 'Product' (with a sub-label 'Start typing product name to get list of products'), and 'Test Method(s)' (with a dropdown menu). A 'Create' button is at the bottom right. Blue callout boxes with numbers 4 through 11 point to specific fields: 4 to Material, 5 to FDOT Sample Number, 6 to Sample Received Due Date, 7 to Test Due Date, 8 to Qualification, 9 to Technician Instructions, 10 to Product, and 11 to Test Method(s).

4. **Material** – enter the Material for the Proficiency evaluation, for example, 901 for aggregate, 334 for asphalt, etc.
5. **FDOT Sample Number** – enter the FDOT Sample Number.
6. **Sample Received Due Date** – enter the sample received due date.

7. **Test Due Date** – enter the test due date. This date cannot be before the sample received due date.
8. **Qualification Area** – select the Qualification area. This will cause the Test Methods field to appear.
9. **Technician Instructions** – enter technician instructions. These instructions will display on **all** sample logins.
10. **Product** – some materials, like aggregate, require a product code to complete the tests. Enter a product code if it is a material that needs one.
11. **Test Method(s)** – select the test methods that will be evaluated. These test methods are the ones that are associated with the qualification that was selected above.

Once a test method has been selected, you will be able to select the specific test definitions and test questions.

The screenshot shows a software interface with the following elements:

- Test Method(s)**: A list of test methods with expandable arrows:
  - AASHTO T 27 Sieve Analysis of Fine and Coarse Aggregates
  - FM 1-T 011 Total Amount of Material Finer Than 0.075 mm (No. 200) Sieve in Aggregate
  - FM 1-T 084 Specific Gravity and Absorption of Fine Aggregates
  - FM 1-T 085 Specific Gravity and Absorption of Coarse Aggregate
  - AASHTO T 21 Organic Impurities in Fine Aggregates for Concrete
  - AASHTO T 255 Total Evaporable Moisture Content of Aggregate by Drying
- Test**: A dropdown menu currently showing "AASHTO T 255 Total Moisture".
- Question(s)**: A dropdown menu currently showing "Weight, Total Moisture".
- + Add Another Test**: A button with a plus sign and a mouse cursor over it.

12. **Test** – select the appropriate test definition in the test field. The Question(s) field will appear.
13. **Test Questions** – select the test question(s) from the test definition that MAC will apply the proficiency sample analysis.
14. **+ Add Another Test** – if another test needs to be added, select the Add Another Test option. Continue until all test definitions and test questions are selected.
15. Select the Create option to create the proficiency sample evaluation.

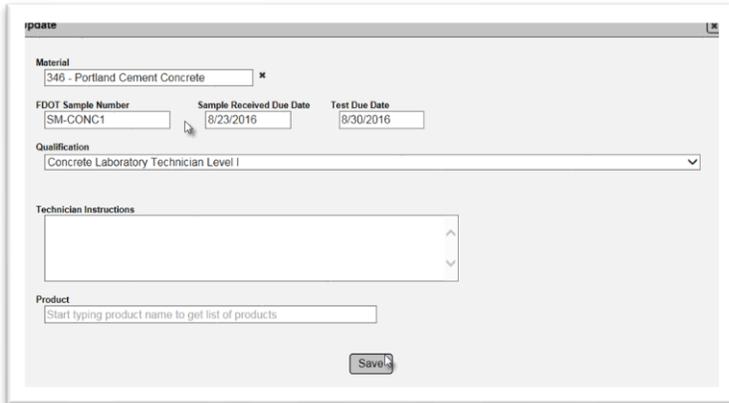
## B. Updating a Proficiency Sample Package

To update an already created Proficiency Sample package:

The screenshot shows a button bar with two buttons: "Update" and "Delete". A mouse cursor is pointing at the "Update" button.

1. Select the Update option.

An Update dialog box will appear.



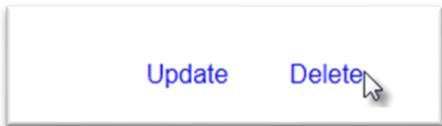
The 'update' dialog box contains the following fields and controls:

- Material: 346 - Portland Cement Concrete \*
- FDOT Sample Number: SM-CONC1
- Sample Received Due Date: 8/23/2016
- Test Due Date: 8/30/2016
- Qualification: Concrete Laboratory Technician Level I
- Technician Instructions: (Empty text area)
- Product: Start typing product name to get list of products
- Save button

2. Make changes as needed.
3. Select the Save option to save the changes.

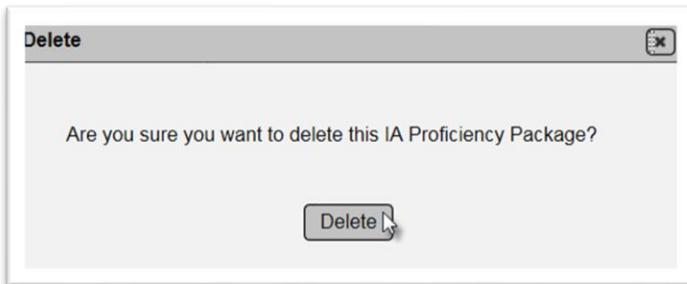
### C. Deleting a Proficiency Sample Package

To delete a Proficiency Sample Package:



1. Select the Update option.

A Delete confirmation dialog box will appear.



The 'Delete' dialog box contains the following text and controls:

- Are you sure you want to delete this IA Proficiency Package?
- Delete button

2. Select the Delete option to delete the package.

**NOTE:** Once testing has begun (the SMO selects the Begin Testing option), a package cannot be deleted.

## D. Updating Tests and Questions

To update the tests and questions:

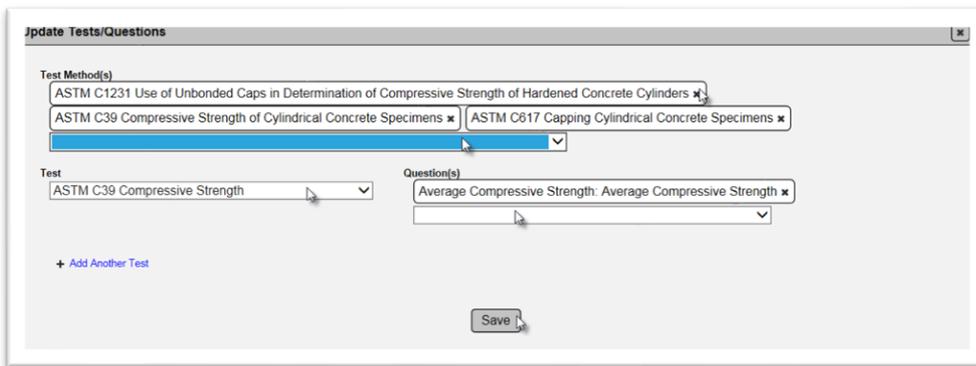


1. Click on the Tests tab to expand it.



2. Select the Update Tests/Questions option.

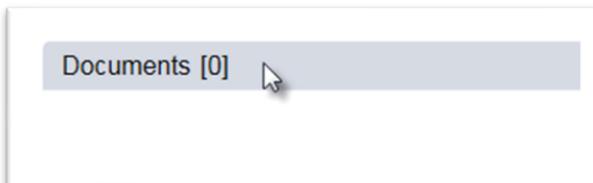
An Update Tests/Questions dialog box will appear.



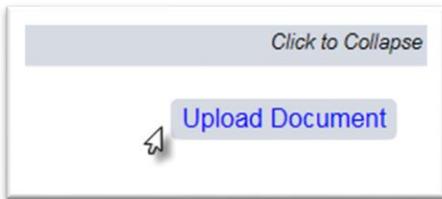
3. To remove existing tests, click on the X next to the test.
4. To add tests, select them from the dropdown list.
5. To add test questions:
  - a. Click on the test from the dropdown.
  - b. Select the test question from the Question(s) dropdown.
6. To delete existing questions, click on the X next to the question.
7. Select Save when all changes have been made.

## E. Uploading Documents to the Proficiency Sample Package

To upload a document to the Proficiency Sample package:

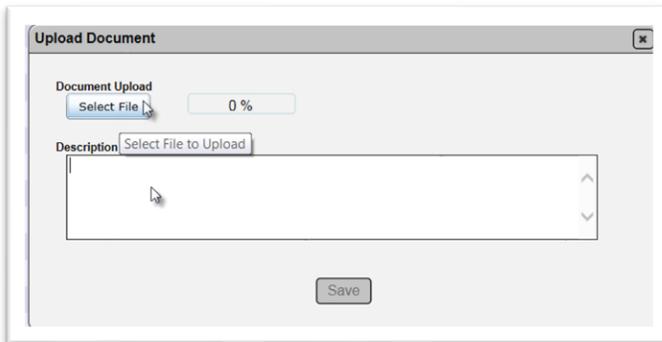


1. Click on the Documents tab to expand it.



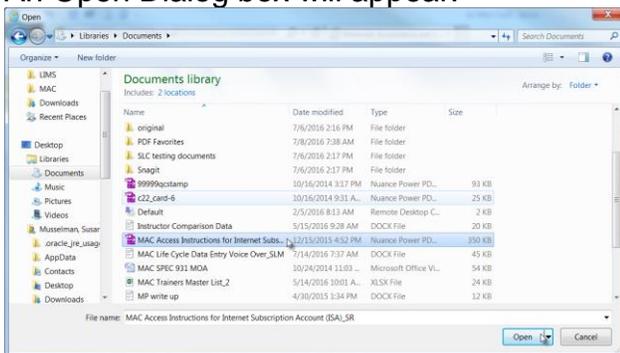
2. Select the Upload Document option.

An Upload Document dialog box will appear.



3. Click on the Select File option to navigate to the file location.

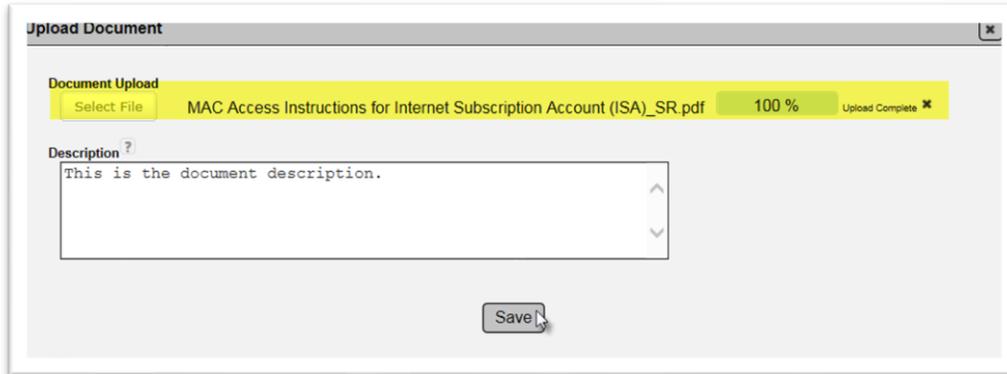
An Open Dialog box will appear.



4. Click on the file to select it.

5. Select the Open option.

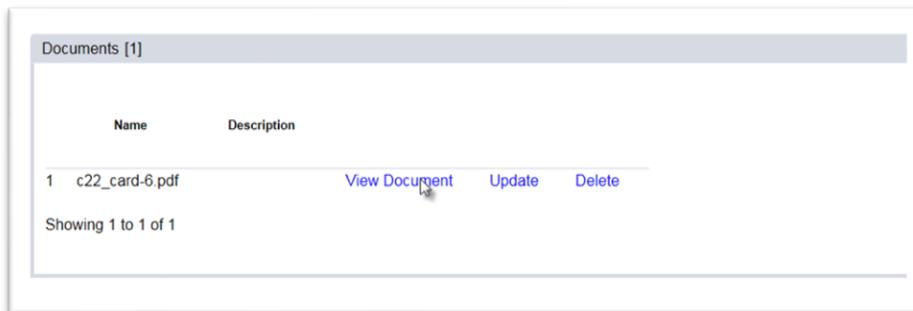
The Upload Document dialog box will reappear indicating that the upload is 100% complete.



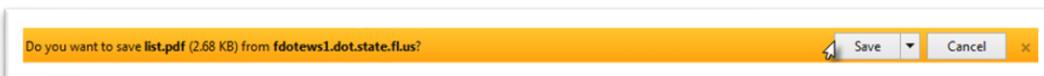
6. Enter any description, if desired.
7. Select the Save option to save the uploaded document in the system.

#### F. Viewing Uploaded Documents, Updating the Document Description and Deleting Uploaded Documents

To view an uploaded document:



1. Select the View Document option next to the document you want to view.



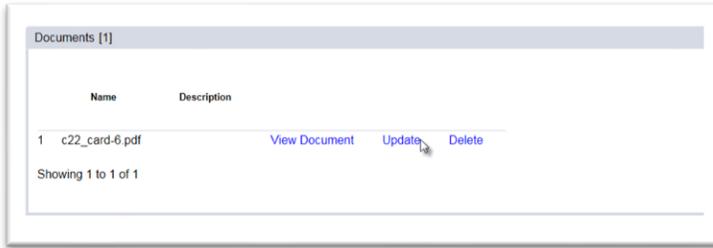
2. Select Save to continue the download and view the document.



3. Select Open to open the download.

The document will be opened in the file format in which is was saved; for example, pdf.

To Update the document description:



1. Select the Update option next to the document you want to update.

An Update dialog box will appear.

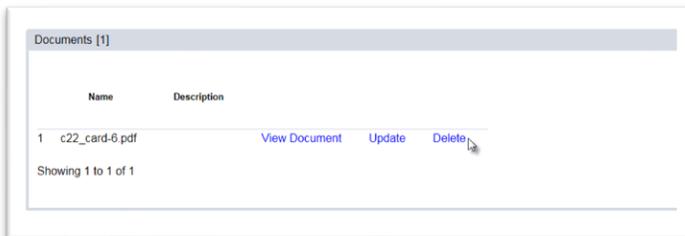


2. Update the description.
3. Select the Save option to save the new description.

You will receive an error message that the description was successfully updated.

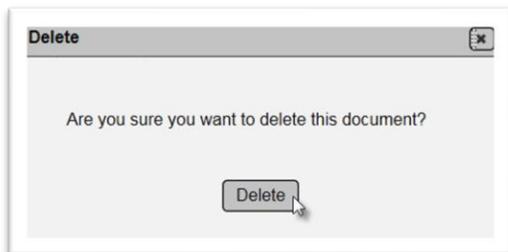
Update IA Proficiency Document was successful

To delete a document:



1. Select the Delete option next to the document you want to delete.

A Delete dialog box will appear.



2. Select the Delete option to delete the document.

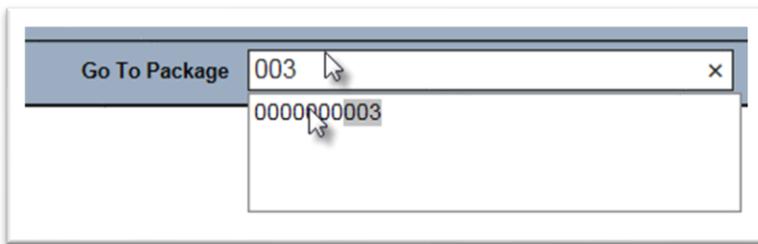
## Chapter 14 – Setting up Labs and Technicians (DMROs and SMO)

Once the SMO has initiated the Proficiency Sample package, the next step is for DMRO and SMO (if needed) to add laboratories and technicians.

### A. Opening an Existing Proficiency Sample Package



1. From the menu, select the Evaluations option.
2. Select IA Proficiency from the submenu.



3. If you know the Evaluation Id of the IA Proficiency Sample package, enter it in the GoTo Package field.
4. Select the appropriate id from the list.

You will be navigated to the IA Proficiency Sample package.



5. If you don't know the Evaluation Id, select the Search option to search for an IA Proficiency Sample package.

A search screen will appear at the top of the page.



6. Enter the search criteria to narrow down the list. MAC will indicate the number of results that meet the provided search criteria.
7. Select Search to perform the search.

A list of the search results will appear below the Search option.

	Package Number	FDOT Sample Number	Qualification	Status
1	000000002	5F001I	Asphalt Plant Level I	In Progress
2	000000003	2D001P	Asphalt Plant Level I	In Progress
3	000000005	SM-CONC1	Concrete Laboratory Technician Level I	In Progress

8. Click on the row of the IA Proficiency Sample package to navigate to that package.

### B. Adding a Contact Person

A contact person for the district must be added before the technicians can be entered.

District 1 Click to Collapse

Update

Comments

Technicians [0] Click to Expand

Documents [0] Click to Expand

1. Click on the District Tab to expand it.
2. Select the Update option.

An Update dialog box will appear.

**Update** X

Comments 47 of 2000

Save

3. **Contact Person** – enter the name and office phone number (cell phone number is optional) of the contact person. This information is required to open the process for adding technicians. The contact person is DMRO or SMO person responsible for coordinating the distribution of the proficiency samples.

4. **Comment** – add a comment, if desired.
5. Select the Save option.

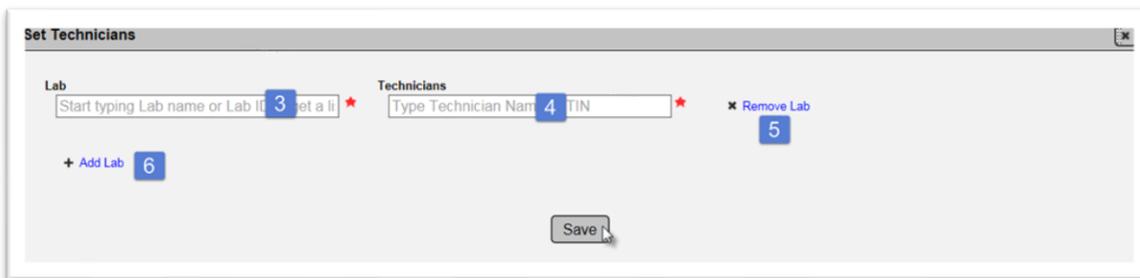
C. Setting up Technicians and Labs

Once the contact person is added, the page level action to set the technicians becomes available.



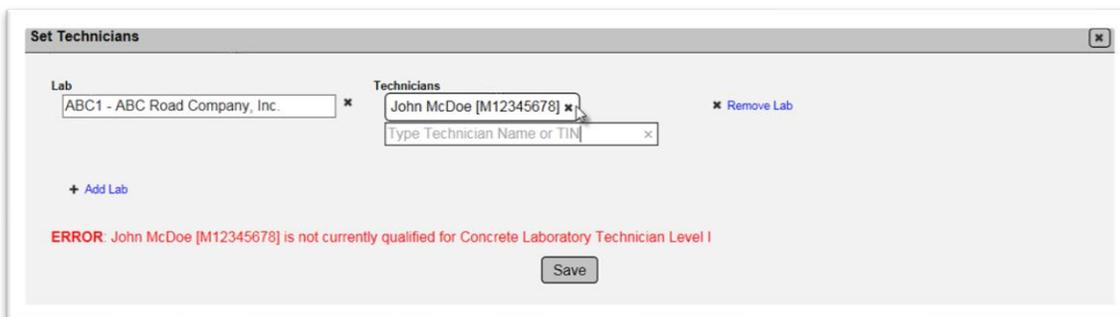
1. Click on the Technicians tab to expand it.
2. Select the Set Technicians option.

A Set Technicians dialog box will appear.



3. **Lab** – enter the Lab Id of the first technician(s).
4. **Technicians** - enter the technician(s) at that lab.
5. **x Remove Lab** – to remove a lab from the entry, select the X next to the Remove Lab option.
6. **+ Add Lab** – to add another lab, select the + next to the Add Lab option. A new row will appear to add another lab and additional technician(s). Repeat until all labs and technicians are entered.
7. Select Save to save the entry.

If a technician is not qualified in the qualification area, you will receive an error message when you select the Save option.



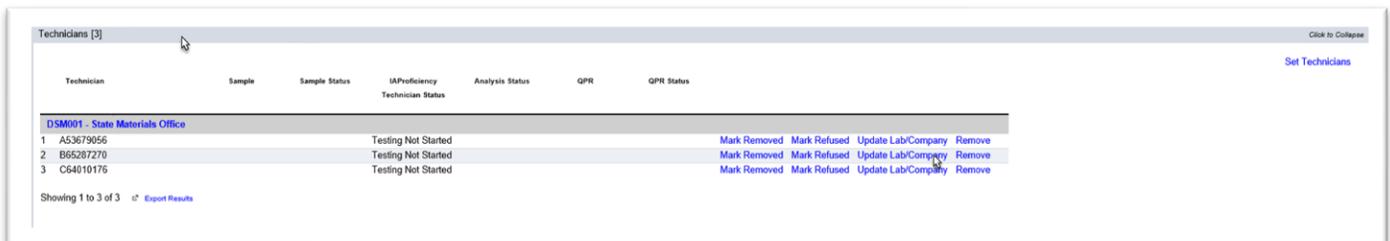
8. Click on the X next to the technician's name and TIN to remove the entry.

A technician cannot be included in more than one district. If a district enters a technician already entered on another district, you will receive this error message when you select the save option.



#### D. Revising the Technician's Company

For some qualification areas, like Asphalt Plant Level 1, the verification technicians may be performing the testing in a QC laboratory.



1. Click on the Technicians sub tab to expand. It.
2. Select the Update Lab/Company option for the technician who needs to have a different company than the laboratory's company enter the test results.

An Update Lab/Company dialog box will appear.



3. **Use a different Company than the Lab's Company** – select the Use a different Company than the Lab's Company option.

A Company field will appear.

4. **Company** – enter the company that will perform the data entry for the technician.
5. Select the Save option.
6. Repeat for any other technicians in other labs in your district.

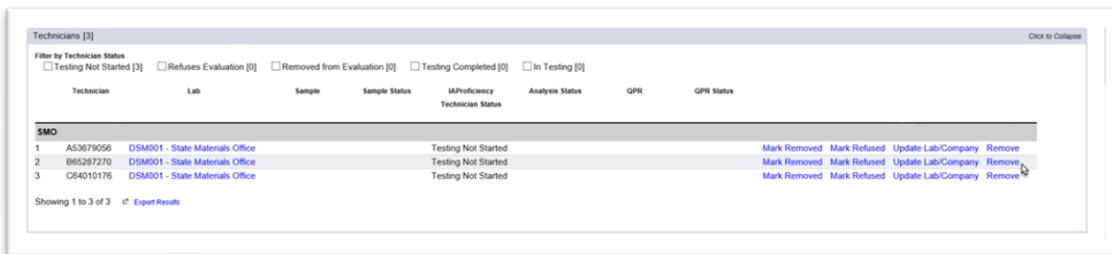
## E. Adding Documents to the District Tab

The DMROs can add district specific documents to their tab. Follow the document instructions found in Chapter 13, [E. Uploading Documents to the Proficiency Sample Package](#).

Once all the DMROs have completed setting up technicians and labs, the SMO can initiate the sample testing phase. Technicians cannot be added to the Proficiency Sample package once the SMO begins the testing.

## F. Removing Technicians before SMO Initiates Testing

Before the SMO initiates the testing, there is a Remove option for the technician. Selecting the Remove option removes the technician as if they were never entered on the package.



	Technician	Lab	Sample	Sample Status	IA/Proficiency Technician Status	Analysis Status	QPR	QPR Status
<b>SMO</b>								
1	A53679056	DSM001 - State Materials Office			Testing Not Started			Mark Removed Mark Refused Update Lab/Company Remove
2	B65287270	DSM001 - State Materials Office			Testing Not Started			Mark Removed Mark Refused Update Lab/Company Remove
3	C64010176	DSM001 - State Materials Office			Testing Not Started			Mark Removed Mark Refused Update Lab/Company Remove

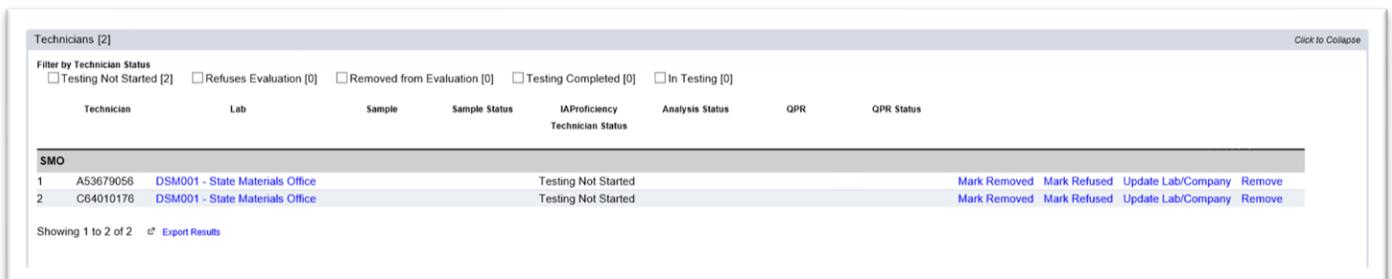
1. Select the Remove option on the row of the technician that you want to remove.

A Remove dialog box will appear.



2. Select the Remove option.

The technician will be removed from the tab and the evaluation package.



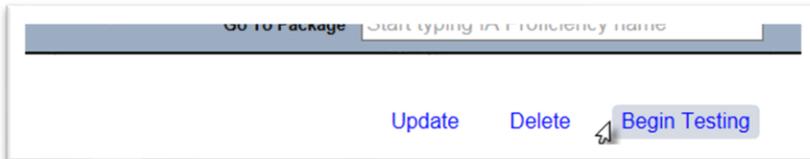
	Technician	Lab	Sample	Sample Status	IA/Proficiency Technician Status	Analysis Status	QPR	QPR Status
<b>SMO</b>								
1	A53679056	DSM001 - State Materials Office			Testing Not Started			Mark Removed Mark Refused Update Lab/Company Remove
2	C64010176	DSM001 - State Materials Office			Testing Not Started			Mark Removed Mark Refused Update Lab/Company Remove

**NOTE:** After testing is initiated, this option is no longer available and the technician must be accounted for in the package analysis. See Chapter 16, [A. Removing a Technician from the Proficiency Sample Package](#).

## Chapter 15 – Initiating Proficiency Sample Testing

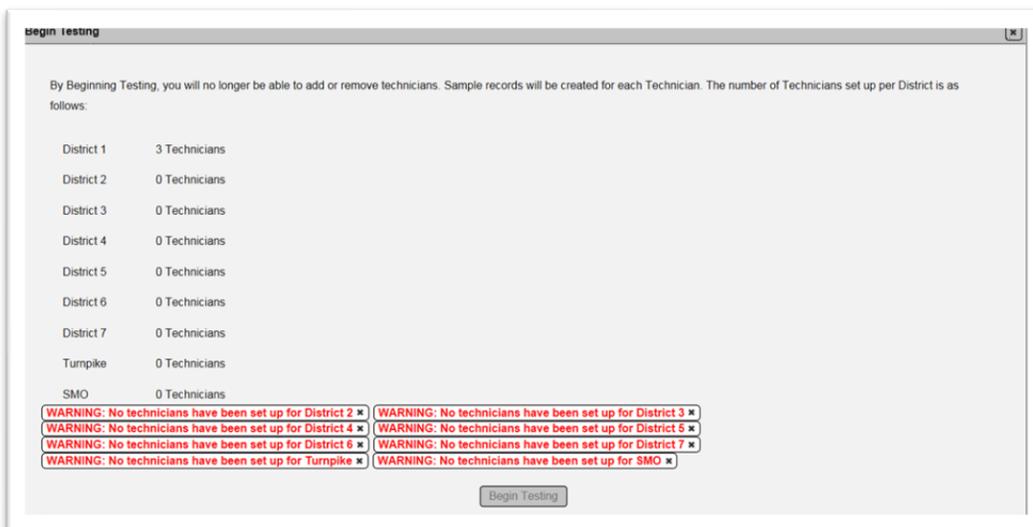
The SMO must initiate the sample testing phase for technicians to be able to enter test results. The SMO's Begin Testing option will not show until at least 3 technicians are listed on the Proficiency Sample package. The SMO will communicate with the DMROs outside of MAC to determine if the DMROs have completed setting technicians before Begin Testing is initiated.

**NOTE:** Once SMO has begun testing, technicians cannot be added to the Proficiency Sample package.



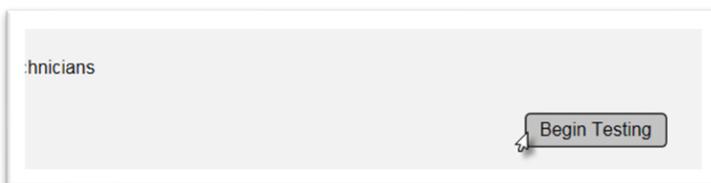
1. Select the Begin Testing option.

A Begin Testing dialog box will appear.



If DMROs have not set technicians, there will be a warning message that must be acknowledged before the Begin Testing option is activated. If any such warning messages appear:

2. Click on the x next to the warning.



3. When all the warning messages are acknowledged, select the Begin Testing option.

The Proficiency Sample package status will change to Samples Generated.

## Chapter 16 – Removing Technicians, Marking Technicians as Removed or Refused

### A. Removing a Technician from the Proficiency Sample Package

Turnpike

Contact Person	Cell Phone Number	Office Phone Number
Susan Musselman		(555) 111-2222

Comments

Technicians [1]

Technician	Sample
------------	--------

1. Click on the District tab to expand it.
2. Click on the Technicians sub-tab to expand it.

Technician	Sample	Sample Status	IA Proficiency Technician Status	ASTM C39 Compressive Strength	Analysis Status	QPR	QPR Status
DSM001 - State Materials Office							
1 D46574071	1600014571	Submitted for Lab Testing	In Testing	Testing in Progress		<a href="#">Mark Removed</a>	<a href="#">Mark Refused</a>

Showing 1 to 1 of 1

3. Select the Mark Removed option next to the technician you want to remove.

A Marked Removed Removal Reason dialog box will appear.

**Mark Removed**

Removal Reason

- Damaged Sample
- Equipment Issues
- Lab Not Accredited
- Sample Lost
- Technician Does Not Perform This Test
- Technician Not Active
- Other

4. **Removal Reason** – select the appropriate reason from the dropdown list. If the list of standard responses does not cover the removal reason, select Other.

5. **Removal Reason Other Text** – if Other is selected, you must provide a removal reason in the Removal Reason Other Text field.

6. Select Save to mark the technician as removed.

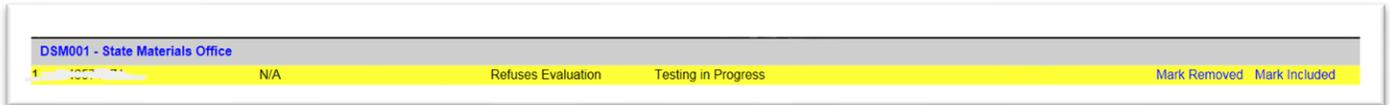
B. Marking a Technician as Refused

1. Click on the District tab to expand it.
2. Click on the Technicians sub-tab to expand it.

Technician	Sample	Sample Status	IAProficiency Technician Status	ASTM C39 Compressive Strength	Analysis Status	QPR	QPR Status
D46574071	1600014571	Submitted for Lab Testing	In Testing	Testing in Progress			Mark Removed Mark Refused

3. Select the Mark Refused option next to the technician you wish to designate as refusing to participate.

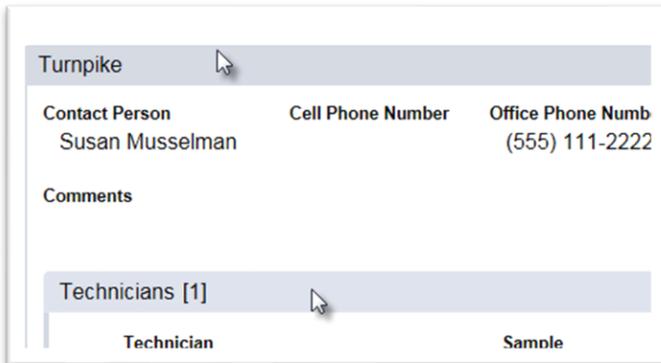
The technician record will be highlighted and the status will change to Refuses Evaluation.



**NOTE:** Technicians marked as refused will receive an unsatisfactory QPR.

### C. Including a Removed or Refused Technician

If a technician is inadvertently marked as removed or refused, the action can be undone.



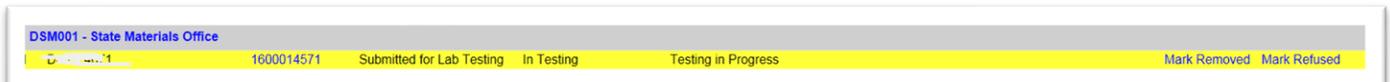
1. Click on the District tab to expand it.
2. Click on the Technicians sub-tab to expand it.

On technicians that have been marked removed or refused, an option to mark included will appear.



3. Select the Mark Included option.

The technician record will be highlighted and the status will change to Submitted for Lab Testing.



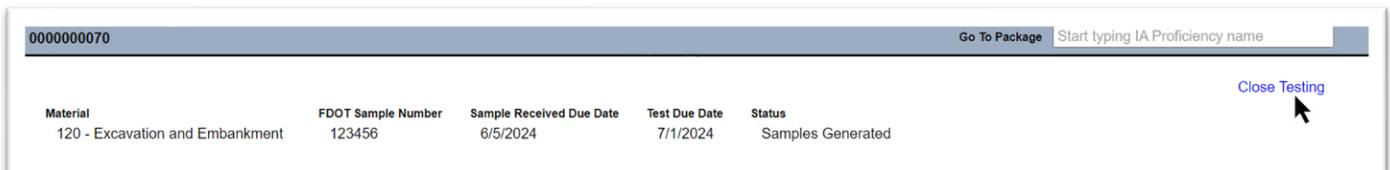
## Chapter 17 – Closing the IA Proficiency Sample Evaluation

### A. Closing the IA Proficiency Sample Evaluation

Once the SMO begins testing, the IA Proficiency Sample Evaluation status is Samples Generated.

MAC will allow the evaluation to be closed even if all the technicians have not completed testing and the samples are not yet finalized. DMRO IA PMUs need to coordinate with the technicians in their district to ensure that samples are being completed in a timely manner.

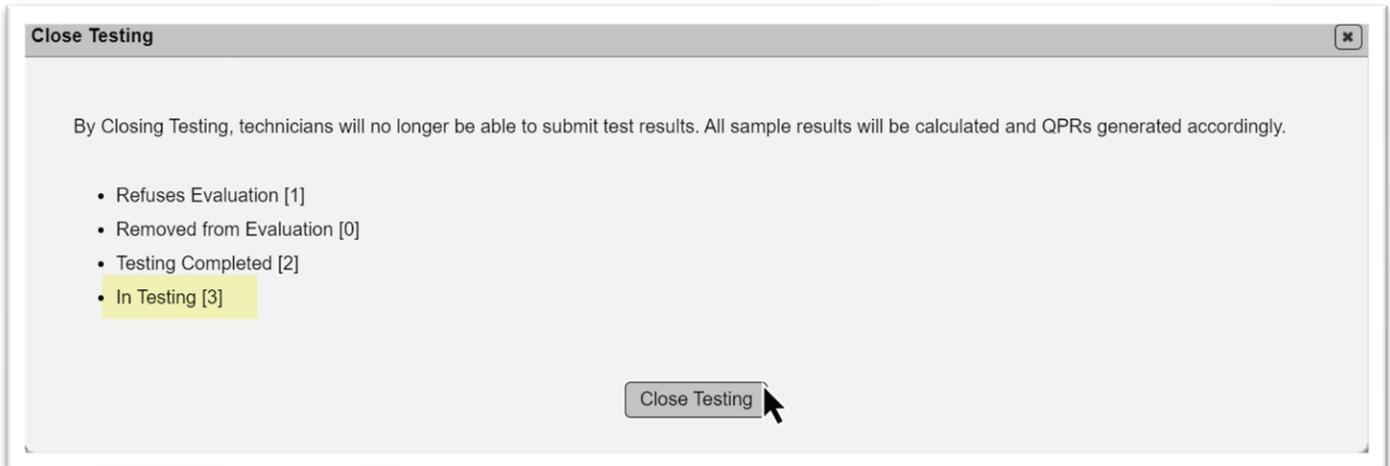
When the Close Test Date is reached, SMO will close the proficiency sample evaluation.



Material	FDOT Sample Number	Sample Received Due Date	Test Due Date	Status
120 - Excavation and Embankment	123456	6/5/2024	7/1/2024	Samples Generated

1. Select the Close Testing option.

A Close Testing dialog box appears. It will display the number of technicians who have been designated as Refused to Participate (Chapter 16, [B. Marking a Technician as Refused](#)), removed (Chapter 16, [A. Removing a Technician from the Proficiency Sample Package](#)) and those with samples not yet finalized.



Close Testing

By Closing Testing, technicians will no longer be able to submit test results. All sample results will be calculated and QPRs generated accordingly.

- Refuses Evaluation [1]
- Removed from Evaluation [0]
- Testing Completed [2]
- In Testing [3]

Close Testing

2. Select the Close Testing option.

The IA Proficiency Sample Evaluation status is Samples Complete. MAC performs the statistical analysis on the package and designates technicians as Inside or Outside the statistical range. It generates the QPRs for the technicians designated as Inside (Satisfactory).

**NOTE:** Once the proficiency sample evaluation is closed, no updates can be made to the package or any samples in the package. Technicians who did not complete their samples will be designated as Unsatisfactory and will receive a strike.

B. Generating Unsatisfactory QPRs for the IA Proficiency Sample Evaluation

Each DMRO and SMO IA PMU from the Districts must manually generate QPRs for any technicians designated as Unsatisfactory.

District 2									
3		ABC Producers	N/A	Refuses Evaluation				Generate QPR	Mark QPR Not Required
4		ABC Producers	2401441611	Testing Completed	1.00	Inside	7/2/2024		Satisfactory
District 3									
5		ABC Producers	2401441612	Testing Completed		Outside		Generate QPR	Mark QPR Not Required
6		ABC Producers	2401441613	Testing Completed		Outside		Generate QPR	Mark QPR Not Required

At this point, MAC has already generated all Satisfactory QPRs. Each District Tab will have the option to Generate QPRs for technicians outside the statistical limits and those who refused the evaluation.

1. If the technician is outside the statistical limits, select the Generate QPR option. The instructions are the same as described in Chapter 12, [A. Generating the QPR](#).
2. If the technician should not receive a strike, select the Mark QPR Not Required option.

## Chapter 18– Designating Refusal to Participate on Observation Evaluations

[Materials Manual Section 5.5 Volume 1 Independent Assurance Program](#) designates that a technician’s failure to participate in an IA evaluation is sufficient reason to initiate an Unsatisfactory QPR resulting in a strike. The IA PMU should make every effort to allow the evaluated technician to participate, however, there are times when this will not be possible or the technician is uncooperative. This chapter will describe how to indicate nonparticipation on an Observation evaluation. For Proficiency Sample Packages, see Chapter 16, [B. Marking a Technician as Refused.](#)

### A. Observation Evaluation

All procedure checklists have been updated to include a Participation Section as the first section. When a technician refuses to participate:

1. Create the Observation in accordance with [Chapter 3 – Creating an Observation Evaluation on a Laboratory Qualification Area](#) or [Chapter 4 – Creating an Observation Evaluation on a Field Qualification Area](#) depending on the qualification area.

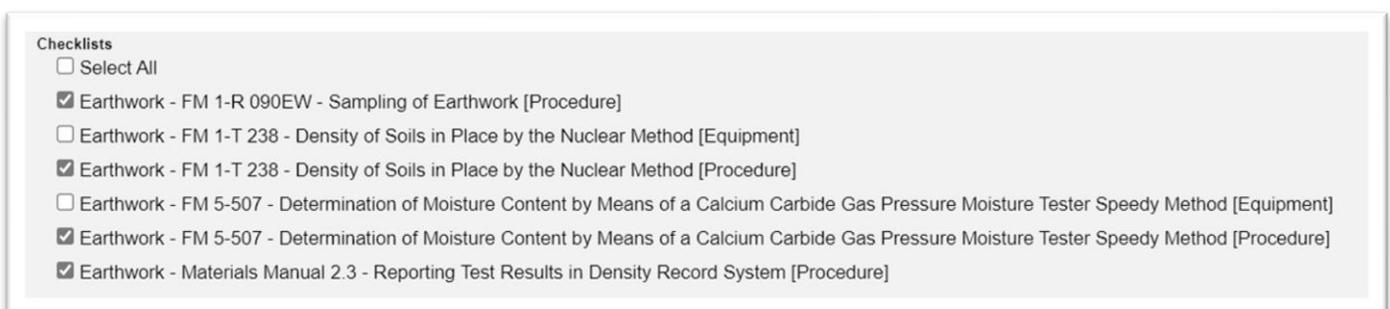


Checklists

- Select All
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Procedure]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Equipment]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Procedure]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Equipment]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Procedure]
- Concrete - ASTM C172 - Sampling Freshly Mixed Concrete [Equipment]
- Concrete - ASTM C172 - Sampling Freshly Mixed Concrete [Procedure]
- Concrete - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method [Equipment]
- Concrete - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method [Procedure]
- Concrete - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method [Equipment]
- Concrete - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method [Procedure]
- Concrete - ASTM C31 - Making and Curing Concrete Test Specimens in the Field [Equipment]
- Concrete - ASTM C31 - Making and Curing Concrete Test Specimens in the Field [Procedure]
- Concrete - FM 5-501 - Water Cementitious Ratio [Procedure]

- a. In order to designate that the technician refused to participate per each test method, select the procedure checklists for each test method. In this example, select the procedure checklists for slump, temperature, making cylinders, water cementitious ratio, and the appropriate air content test method(s).

In this example, all the earthwork procedure checklists have been selected:



Checklists

- Select All
- Earthwork - FM 1-R 090EW - Sampling of Earthwork [Procedure]
- Earthwork - FM 1-T 238 - Density of Soils in Place by the Nuclear Method [Equipment]
- Earthwork - FM 1-T 238 - Density of Soils in Place by the Nuclear Method [Procedure]
- Earthwork - FM 5-507 - Determination of Moisture Content by Means of a Calcium Carbide Gas Pressure Moisture Tester Speedy Method [Equipment]
- Earthwork - FM 5-507 - Determination of Moisture Content by Means of a Calcium Carbide Gas Pressure Moisture Tester Speedy Method [Procedure]
- Earthwork - Materials Manual 2.3 - Reporting Test Results in Density Record System [Procedure]

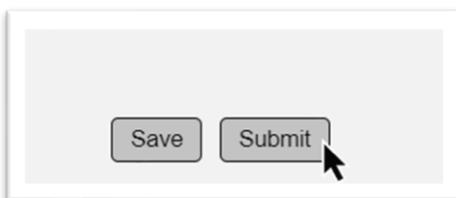
2. Update all checklists as described in Chapter 5, [F. Completing Multiple Checklists](#).

FM 1-T310 - In-Place Density of Soils and Soil Aggregates by Nuclear Methods [Procedure]			
	P	F	N/A
<b>Participation</b>			
1. Technician participated in evaluation.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>General</b>			
2. Warm-up time allowed by the technician is within manufacturer's guidelines.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. Standard counts obtained on at least 100 PCF (1600 kg/m <sup>3</sup> ) material.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. Gauge is at least 10 feet (3 meters) away from large objects.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5. Gauge is at least 30 feet (9 meters) away from other gauges.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Standard Density Count</b>			
6. Today's Standard Density Count is within the allowable range.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
7. Today's Standard Density Count correctly verified by manual calculation.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Standard Moisture Count (For NDG's Only)</b>			
8. Today's Standard Moisture Count is within the allowable range.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
9. Today's tolerance for Standard Moisture Count correctly verified by manual calculation.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Density Test</b>			
10. Test site chosen is at least 6 inches away from any vertical object(s).	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
11. Test site is scraped and smooth.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
12. Voids greater than 1/8 inch at the test site were filled with native fines.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
13. Test hole is at the correct depth.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
14. Test hole was not disturbed during drill rod extraction.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
15. Gauge source rod is placed at the desired test depth.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
16. The NDG/L-NDG is capable of testing at odd test depths on a production LOT when the test requires odd test depths.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
17. The gauge is pulled gently in the direction that will bring the side of the source rod in firm contact with the side of the hole nearest the scaler.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
18. The appropriate density was transferred to the database/datasheet.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
19. Using an approved gauge and base material, nuclear moisture content (%) is obtained.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
20. Representative moisture sample is obtained correctly when other means of moisture measurement are required.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

3. Select F for the Participation question.

4. Select N/A for all other steps.

**NOTE:** This ensures that no steps on a refuse to participate evaluation get counted in the IA Evaluation Failed Steps report.



5. Complete the checklists and select the Submit option.

6. The Generate Report(s) option should appear. Generate the Unsatisfactory QPR as described in [Chapter 12 – Generating the Qualification Performance Report \(QPR\)](#).

**NOTE: Once a QPR is generated it CANNOT be deleted. Some key fields cannot be updated. Make sure all data is correct before you generate the QPR.**

## B. Split Sample Evaluation

If a technician cannot be located or refuses to participate in a Split Sample evaluation, the IA PMU would not send a sample to the technician. In order to document the refusal to participate and account for the evaluation in the annual goals, instead of a Split Sample evaluation, create an Observation evaluation as described in [A. IA Observation](#).

## C. Proficiency Sample Package Evaluation

Indicating a technician refused to participate in a Proficiency Sample package is documented in Chapter 16, [B. Marking a Technician as Refused](#).

## Chapter 19 – Managing Strikes

Since strikes are stored on each evaluation record, the manage strikes process allows you to review the strikes given and clear them if needed.



1. Select the Evaluations menu option.
2. Select the Evaluations sub-menu option.



3. Select the Search Strikes option.

The Search Strikes search sub-screen will appear.

A screenshot of the Search Strikes search sub-screen. The page has a light blue header with the text 'Filter Options'. Below the header, there are several search fields and dropdown menus. The fields are: 'Technician' (with a placeholder 'Type Technician Name or TIN'), 'Qualification Area' (a dropdown menu), 'Strike Date (On or After)' and 'Strike Date (On or Before)' (two date input fields), 'Evaluator' (with a placeholder 'Type Technician Name or TIN'), 'Evaluation' (with a placeholder 'Start typing Evaluation name or descriptio'), and 'Strike Status' (a dropdown menu). A green bar below the fields contains the text 'Currently selected criteria will yield 95 results'. At the bottom right, there are two buttons: 'Search' and 'Clear Search'.

4. Enter the appropriate filter options to proceed. For example:
  - a. To search for a specific technician, enter the name or TIN in the Technician field. The search will provide all strikes for the technician for all qualifications.
  - b. To search for all strikes for a specific technician in a specific area, select both.
  - c. To search for all the strikes in a specific qualification area, select the qualification area from the Qualification Area dropdown list. The search will provide all strikes to all technicians in that qualification area.
5. Select the Search option.

The sub-screen will be populated with the results.

Technician	Qualification Area	Evaluation	Strike Date	Evaluator	Status		
1	S40062372	Aggregate Testing Technician	0000001625 - ABC1 - ABC Road Company, Inc.	9/19/2016	C65579572	Closed Manually	Reinstate Strike
2	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
3	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
4	S40062372	Concrete Laboratory Technician Level I	0000001658 - ADABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
5	S40062372	Concrete Laboratory Technician Level I	0000001702 - ADABC1 - ABC Road Company, Inc.	9/20/2016	G52016061	Closed Manually	Reinstate Strike
6	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed Manually	Reinstate Strike
7	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
8	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
9	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
10	S40062372	Aggregate Testing Technician	0000001848 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
11	S40062372	Concrete Laboratory Technician Level I	0000001880 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Active	Clear Strike
12	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	Closed by Satisfactory Evaluation	Reinstate Strike
13	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	Closed by Satisfactory Evaluation	Reinstate Strike
14	S40062372	Concrete Laboratory Technician Level I	0000001995 - ABC1 - ABC Road Company, Inc.	9/29/2016	T64078490	Active	Clear Strike

6. Select the Status hotlink to see the history of the strike status.

A Strike Status History dialog box will appear.

Date	Status	By	
1	9/27/2016	Active	Jeanie Kozak
2	9/28/2016	Closed by Satisfactory Evaluation	PAUL PASSE Technician was given a SATISFACTORY evaluation in Qualification Area Aggregate Testing Technician

Showing 1 to 2 of 2

Technician	Qualification Area	Evaluation	Strike Date	Evaluator	Status		
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2	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
3	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
4	S40062372	Concrete Laboratory Technician Level I	0000001658 - ADABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
5	S40062372	Concrete Laboratory Technician Level I	0000001702 - ADABC1 - ABC Road Company, Inc.	9/20/2016	G52016061	Closed Manually	Reinstate Strike
6	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed Manually	Reinstate Strike
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14	S40062372	Concrete Laboratory Technician Level I	0000001995 - ABC1 - ABC Road Company, Inc.	9/29/2016	T64078490	Active	Clear Strike

7. To clear a strike, select the Clear Strike option.

**NOTE:** Do not use this function to clear a strike from a technician that has a strike cleared by a successful evaluation. The entry of the successful evaluation will clear the strike. Circumstances where this function is used are as follows: 1) If the PMU somehow removed the strike by mistake; 2) If the Technician got suspended with 3 strikes and then afterwards met the requirements set by the DMRE, SCE, and STA for removal of strikes.

Technician	Qualification Area	Evaluation	Strike Date	Evaluator	Status		
1	S40062372	Aggregate Testing Technician	0000001625 - ABC1 - ABC Road Company, Inc.	9/19/2016	C65579572	Closed Manually	Reinstate Strike
2	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
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8. If a strike is inadvertently cleared and needs to be reinstated, select the Reinstate Strike option.

**NOTE:** For an Observation or Observation/Split Sample evaluation on a field technician, when the technician fails a step or steps on an equipment checklist, MAC gives the technician a strike. On the first IA Observation Evaluation, the technician should receive a strike according to **Materials Manual 5.5**. Any follow-up strikes should not be assessed. There is no laboratory to receive a deficiency on a Laboratory Qualification Performance Report (LQPR) as when an Observation Evaluation is on a laboratory technician. Evaluators should review the strikes and manually remove any follow-up strikes on equipment only. This does not apply to failed steps on procedure checklists. **This applies only to equipment checklists field testing equipment.** Field tests in MAC for Observation evaluations are:

- Structural Concrete Plastic Properties Test Methods
  - Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete
  - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete
  - ASTM C143 - Slump of Hydraulic Cement Concrete
  - ASTM C172 - Sampling Freshly Mixed Concrete
  - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method
  - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method
  - ASTM C31 - Making and Curing Concrete Test Specimens in the Field
- Earthwork Test Methods
  - FM 1-T 238 - Density of Soils in Place by the Nuclear Method
  - Earthwork - FM 5-507 - Determination of Moisture Content by Means of a Calcium Carbide Gas Pressure Moisture Tester Speedy Method
- Asphalt Test Method
  - FM 5-509 - Rolling Straight Edge