STATE OF CONNECTICUT
DEPARTMENT OF ADMINISTRATIVE SERVICES
REAL ESTATE AND CONSTRUCTION SERVICES

Building Design and Construction
450 Columbus Boulevard
Hartford, Connecticut 06103

eBuilder Guidance Manual
Volume II

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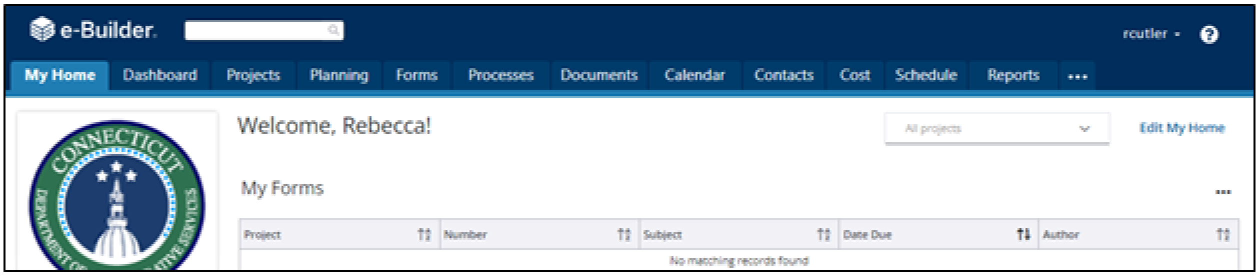
PART I:

PROJECT SET UP

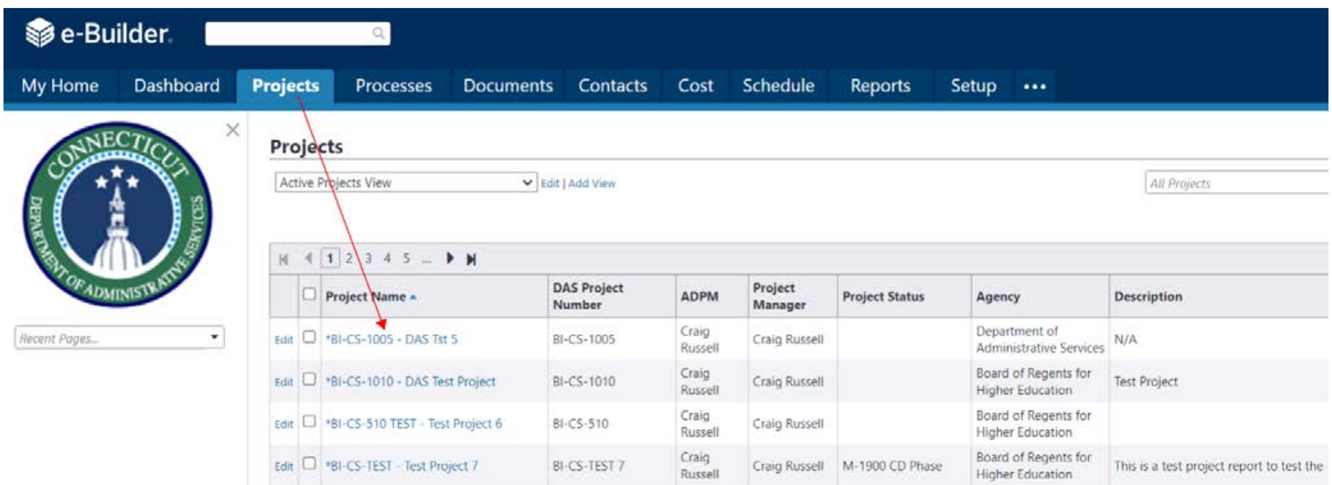
Section 1: Basic User Navigation

1.01 Accessing the project

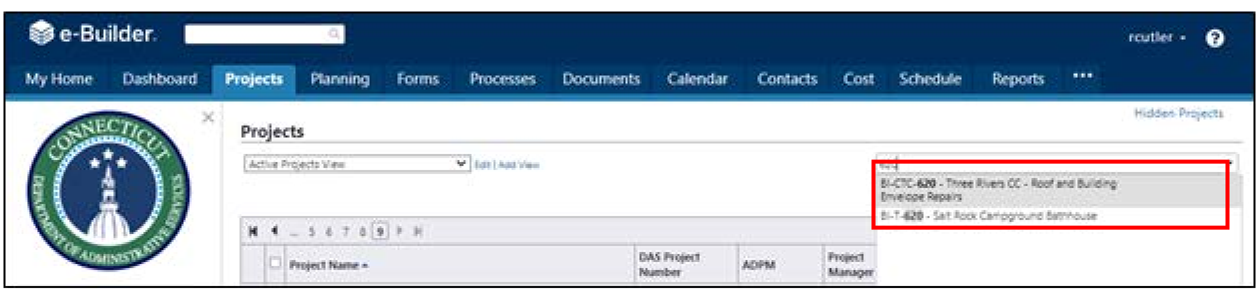
Log in to e-Builder: https://gov.e-builder.net.



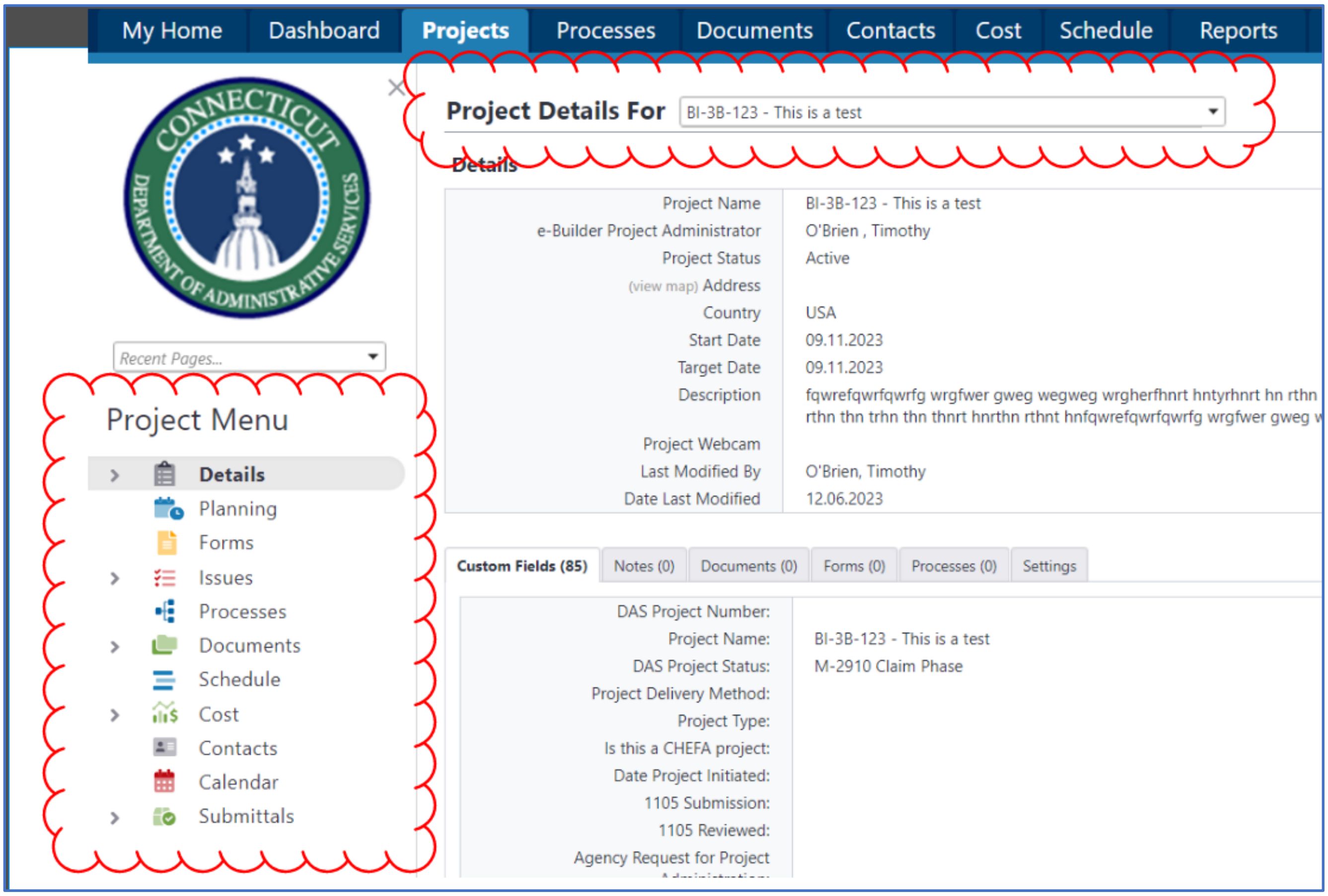
Find the project you wish to access in the list, as shown below, and click on the Project Name to open the project;



or you can search for your project by entering the project number into the "All projects" dropdown list, or by looking for it under the list by clicking dropdown arrow from the "All projects" dropdown list.



Either option will bring up the "Project Details" page. The "Project Details" page has a Project Menu with links for the modules related to that specific project.



Section 2: Project User Access

2.01 For DAS Project Managers:

When a DAS Project Manager is assigned to a project in e-Builder, the Project Manager may contact Construction Support Services (Tim O'Brien in Teams or at timothy.o'brien@ct.gov) to gain access to the project in e-Builder.

2.02 For Agency Users:

Agency PMs may contact Construction Support Services (Tim O'Brien in Teams or at timothy.o'brien@ct.gov) to gain access to a project in e-Builder for themselves, or for other agency staff. For each user, please provide the following information:

1. Name
2. Department
3. Email address
4. Project numbers, if only certain projects, or all in a department prefix.
5. Role: Agency PM, Agency Signatory or review only.

2.03 For Consultants and Contractors

Requests for user access to a project for consultant staff, contractors or any other outside user should come from the DAS Project Manager or from the CA assigned to the project, if the DAS Project Manager has delegated the CA with that responsibility. These requests for access may be made to Construction Support Services (Tim O'Brien in Teams or at timothy.o'brien@ct.gov). Please provide the following information for each user:

1. Name
2. Company
3. Email address
4. Project number or numbers
5. Role on project, such as A/E, A/E subconsultant, CA, GC, CMR or other.

Please specify if the users will only need access to submit invoicing/Payment Applications, otherwise the user will be in workflows and get workflow notifications.

Section 3: (Reserved for future use)

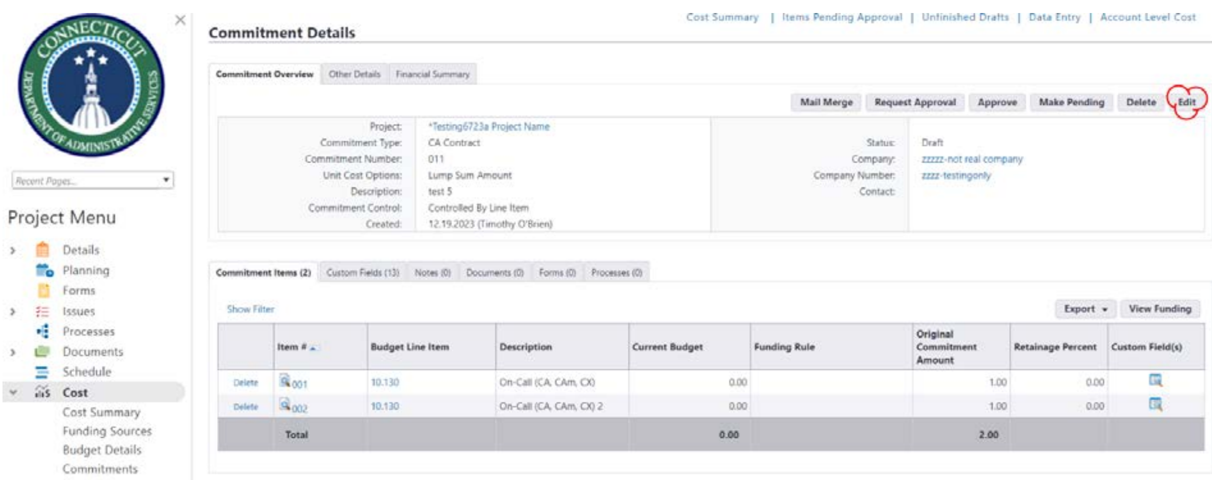
3.01 Coming Soon

Section 4: Add Funding Sources

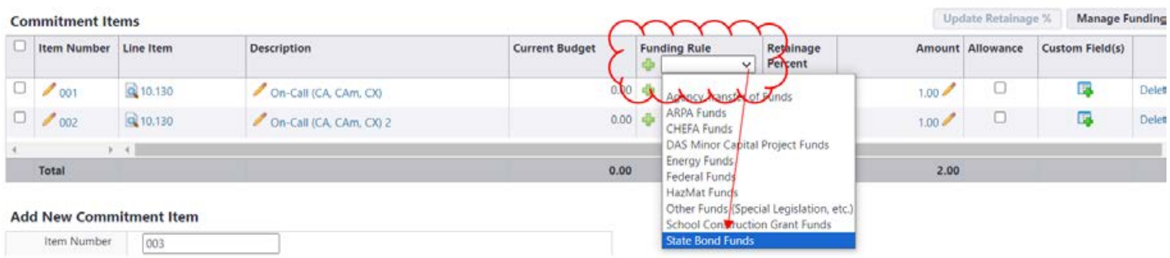
4.01 Accessing the Project

Follow the instructions provided in Section 1 to Access the Project.

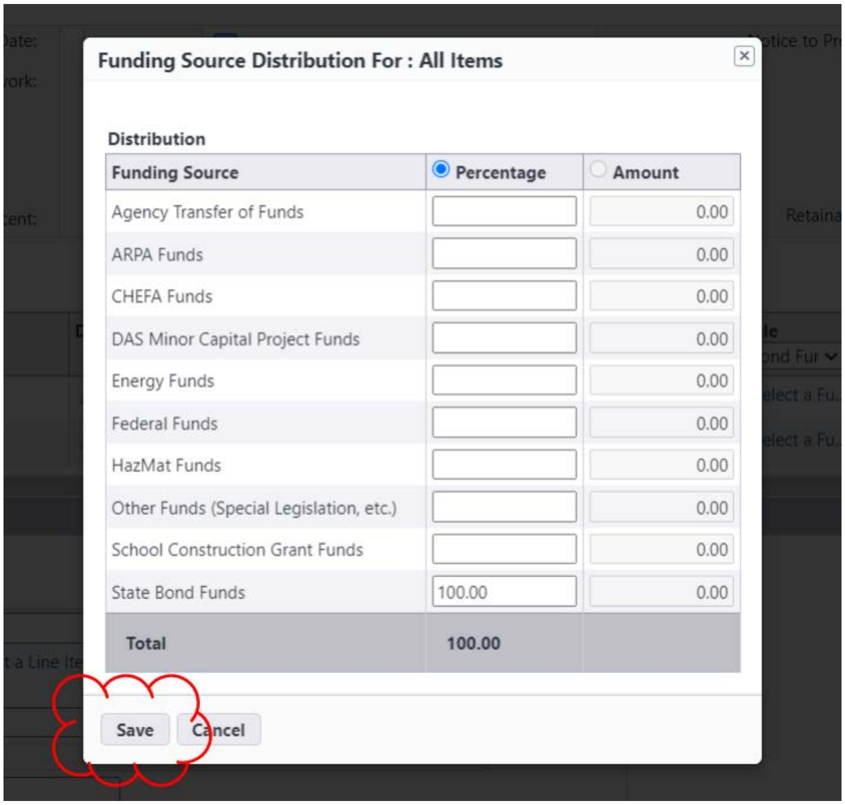
Under the “Project Menu”, click “Cost” and then click “Commitment” to navigate to the Commitment record. Click “Edit” after opening the “Commitment Details” page.



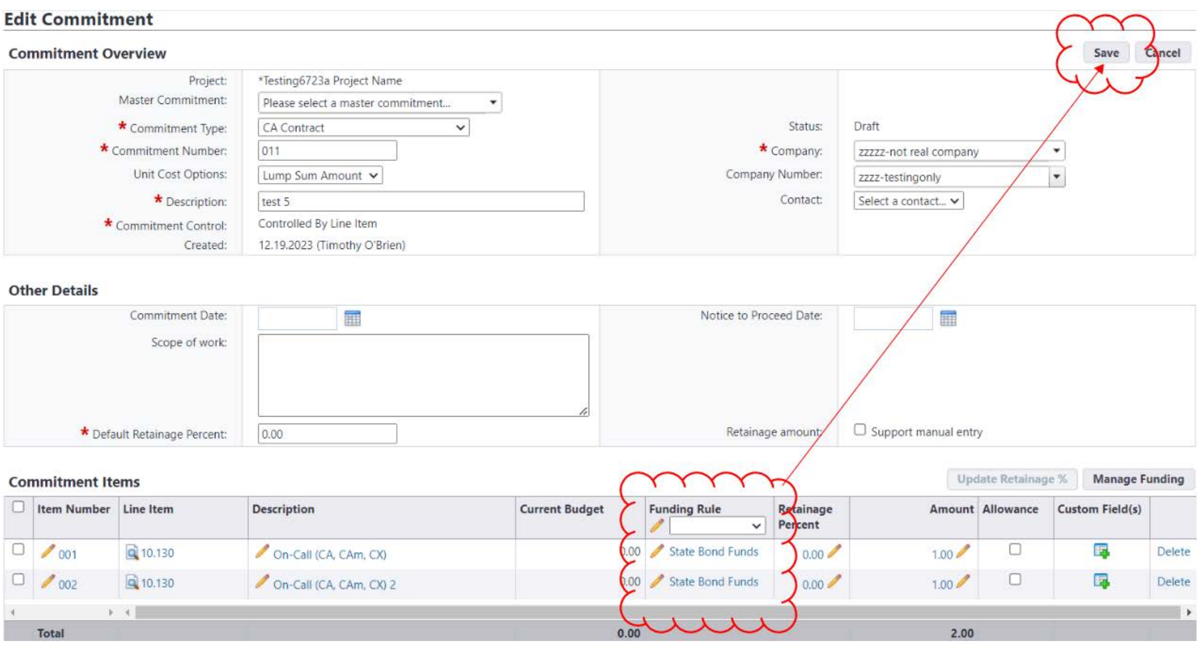
Click on the pull down menu in the “Funding Rule” column and then select the most appropriate funding source.



After selecting the appropriate funding source, click "Save."



Note that the "Funding Rule" has been changed for all of the lines. Click "Save" to complete.



Section 5: Edit Budget Details

The Budget tool in e-Builder is used to track money that has been allocated or otherwise made available for commitment and expenditure on a project. The Budget tool is not for the entry of the whole 1105 project budget unless funding has been allocated for the entire project. The following instructions concern making changes to the Budget in e-Builder so that it reflects the money that has actually been allocated to a project.

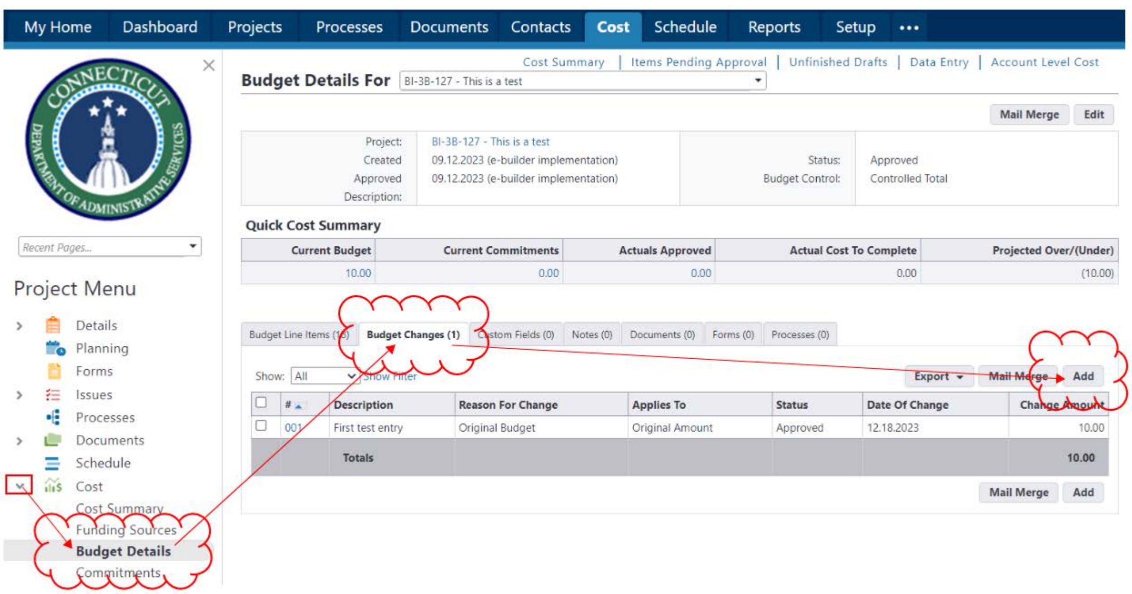
5.01 Accessing the project

Follow the instructions provided in Section 1 to Access the Project.

5.02 Creating a new Budget Change entry

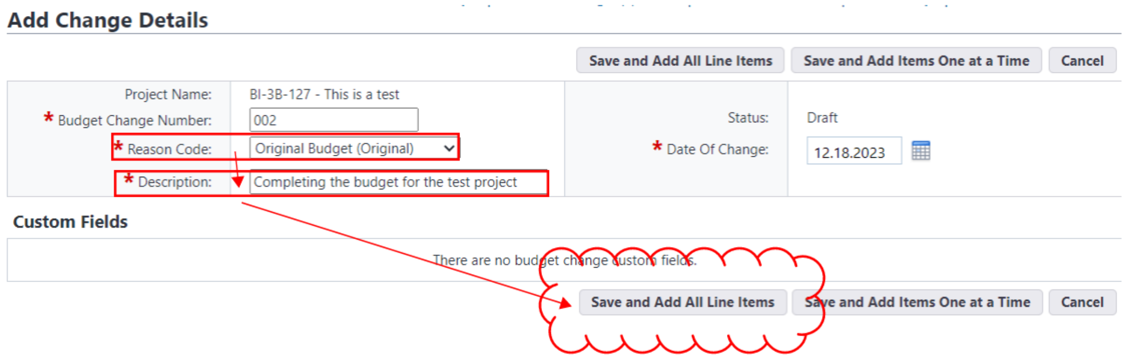
After accessing the project, under the Project Menu:

1. Click the arrow next to "Cost" to open the Cost options.
2. Then click on "Budget Details". That will open show the current project allocated Budget.
3. Then Click on the "Budget Changes" tab. Previously entered budget changes will be listed.
4. To start a new Budget Change entry, click "Add."

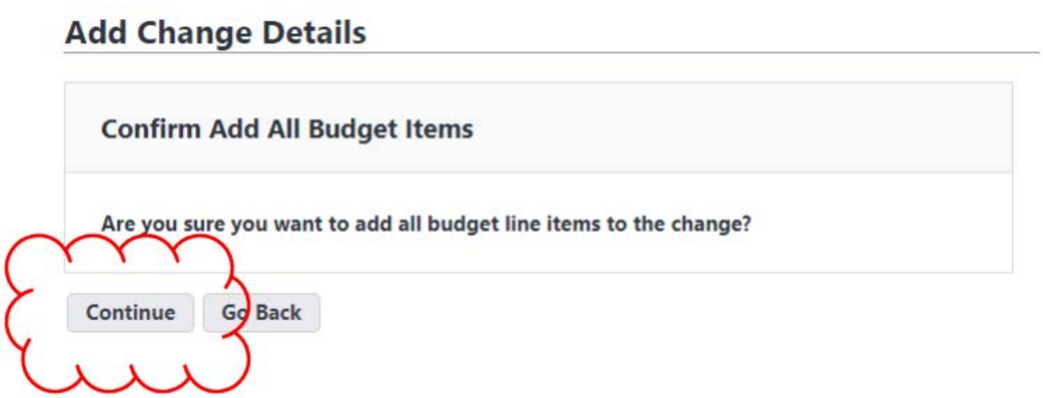


A new screen will open entitled “Add Change Details”. Complete the following:

1. Select a reason code, such as “Original Budget”. “(Original)” at the end of it means that the reason code will make this change show up in the budget as original costs.
2. Enter a Description.
3. Select “Save and Add All Line Items”.

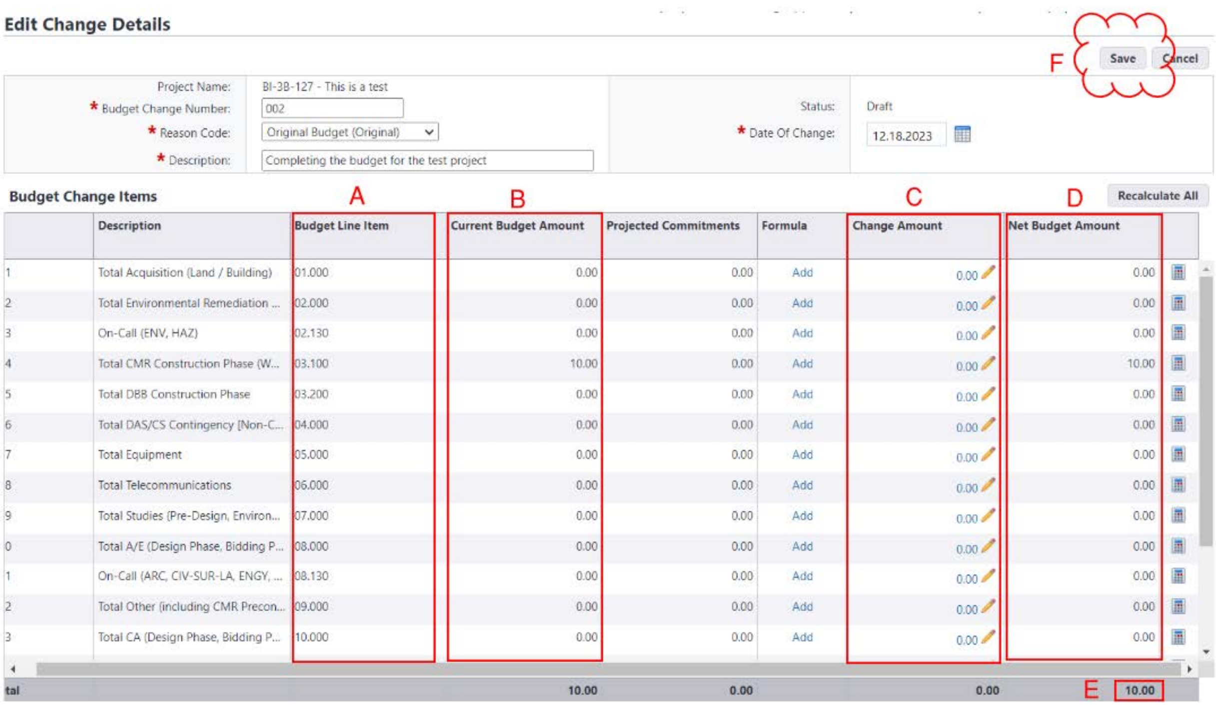


On the next screen, click, “Continue.”



The "Edit Change Details" screen will open. Then enter the changes:

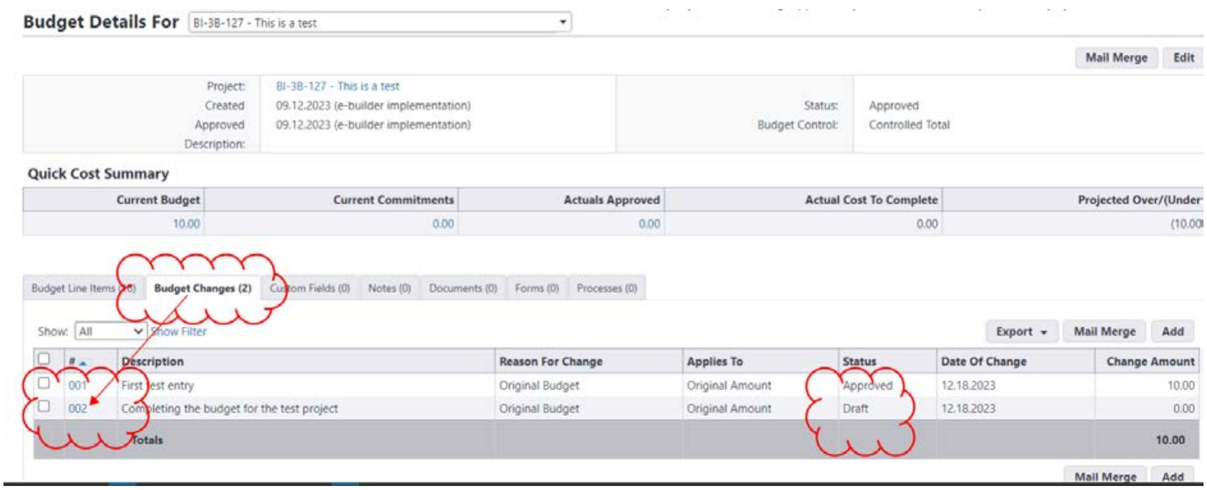
A This column has the Cost Codes for each line in the Budget.
B This column has the current Budget amount for each Cost Code.
C This is the column where the changes being made are entered. Click on the "0.00" or the "pencil" button in the line item you want to edit. Enter the change amount for that Cost Code, which can be either a positive number, for an addition, or a negative number, for a reduction.
D The Net Budget Amount for each Cost Code will calculate automatically. The Net Budget Amount is equal to the Current Budget Amount (B), plus (or minus for negative numbers) the Change Amount (C).
E The value at the bottom of the Net Budget Amount column should reflect the total amount currently allocated to the project.
F When the entry is complete, click "Save."



5.03 Navigating back to a draft budget change

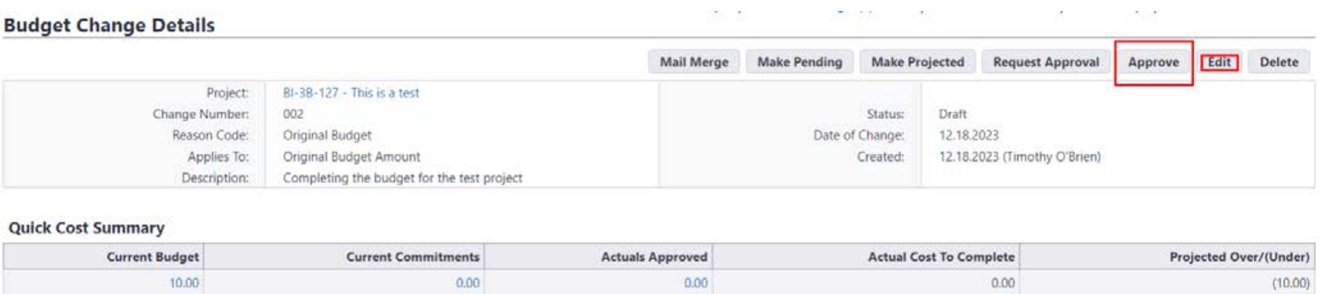
To access a previously saved budget change entry:

1. Follow the instructions in 5.1 & 5.2, steps 1-3 to navigate to the Budget Details/Budget Changes tab.
2. Click on the item # of the draft change to reopen the draft.

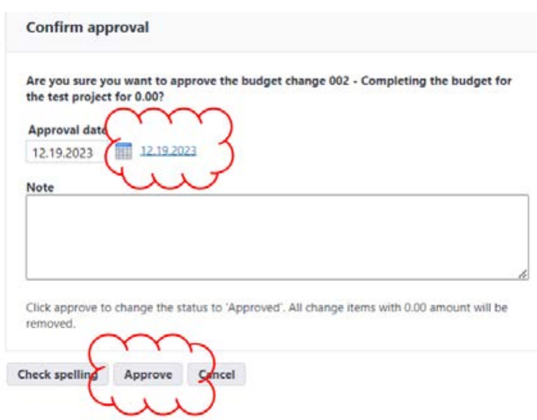


5.04 Approving a budget change

A budget change can be approved by clicking “Approve”. Alternatively, the “Edit” button can be clicked to re-open the draft for further changes.

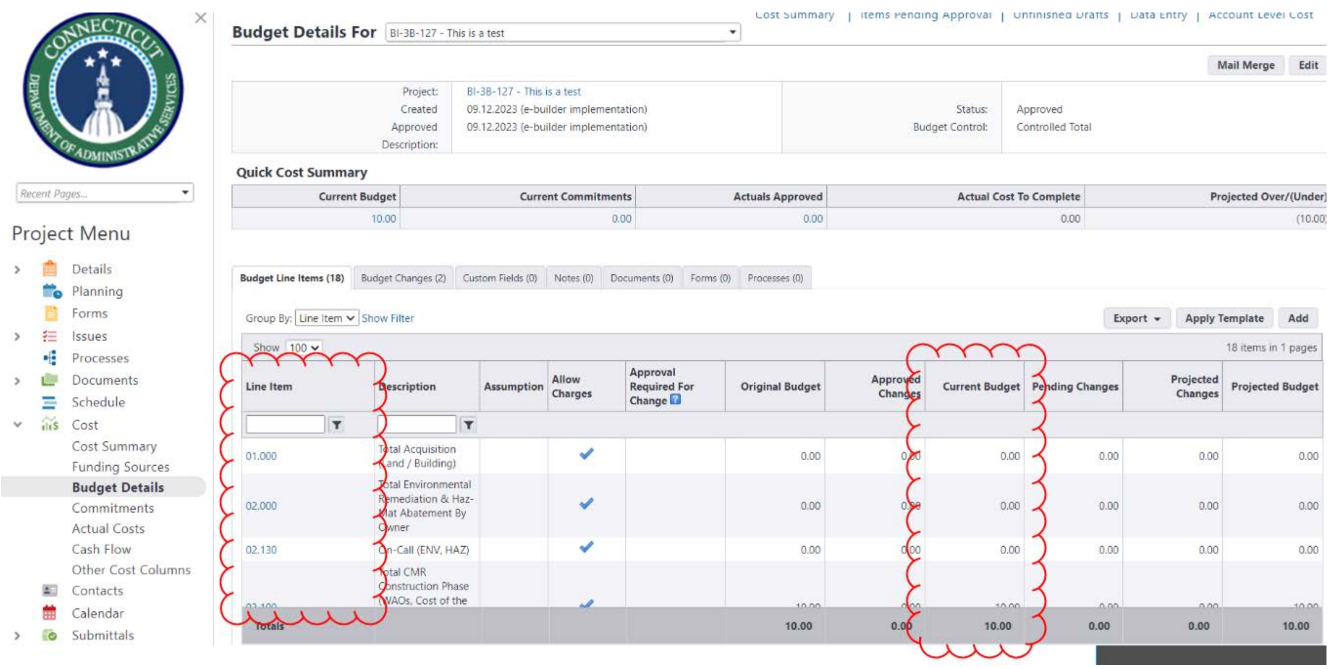


If “Approve” was selected, the approval confirmation screen will appear. Click or enter the approval date. Comments may be entered under “Note,” but are not required. Click “Approve”.



5.05 Budget should reflect all approved changes.

The project budget should now appear updated, based on the sum of the initial budget and all of the Budget Change entries. The budget is broken down by cost code in the "Line Item" column and the "Current Budget" column should reflect the updated current project budget. The number at the bottom of the "Current Budget" column should be the total money allocated to the project, as updated by the Budget Changes made.



Section 5A: Tracking DAS Fees

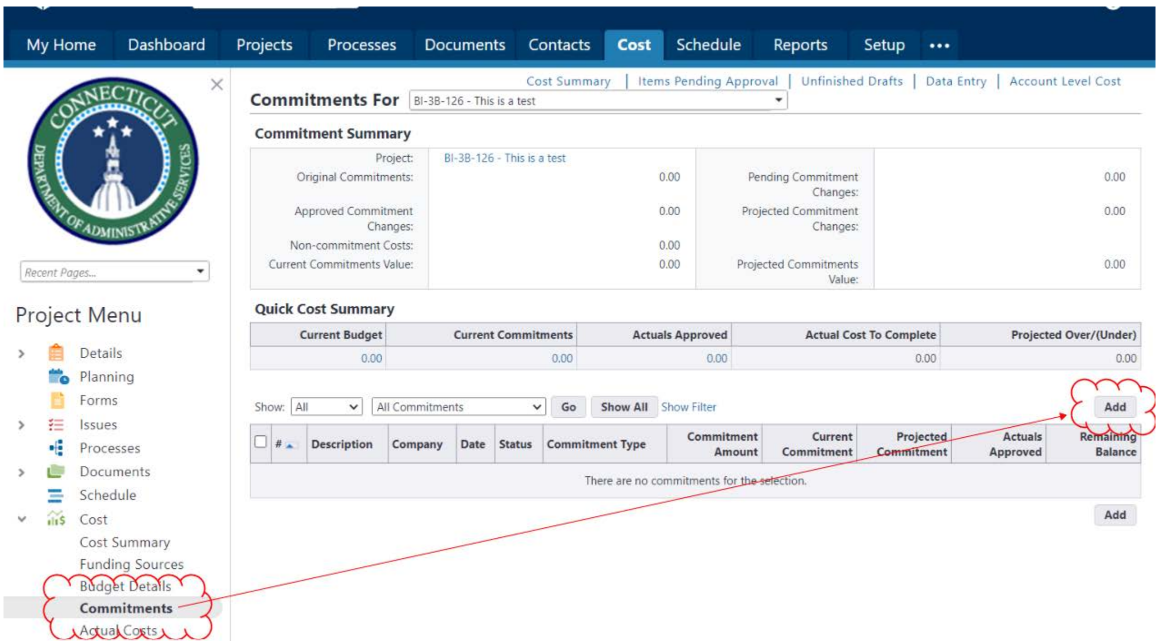
5A.01 Accessing the project

Follow the instructions provided in Section 1 to Access the Project.

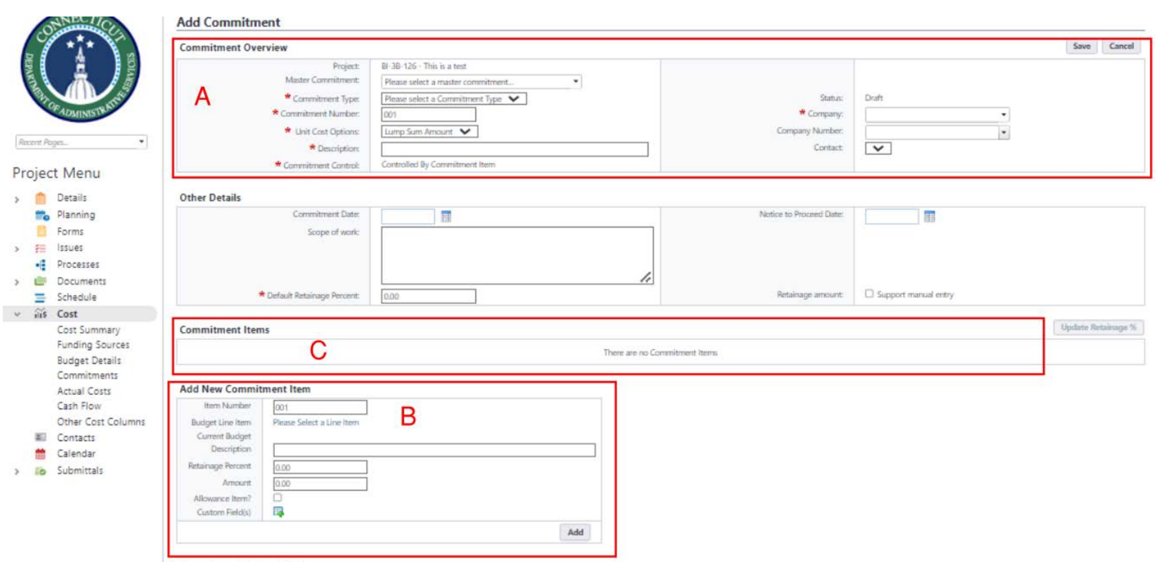
5A.02 Creating a Commitment Record for DAS Fees

The following applies if the project does not already have a Commitment record for DAS fees.

1. After opening the project record, select “Commitments” under the “Project Menu” and then click on “Commitments”. If no commitment appears for DAS fees, click, “Add.”



2. That brings up the draft Commitment form. This description will concern three different parts of that form (labeled A, B and C, below):

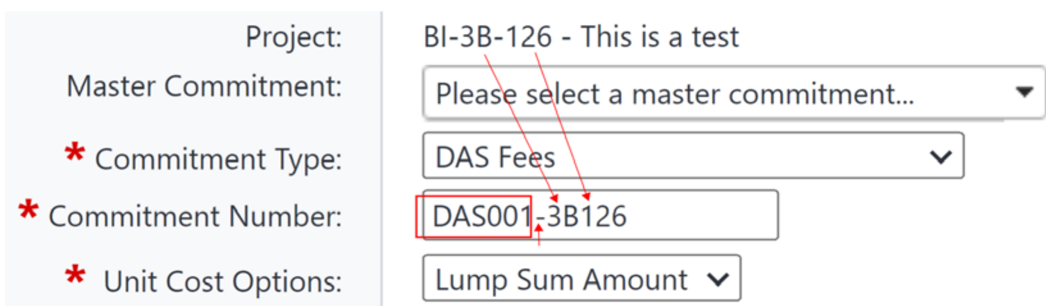


A. Add Commitment

A.1. In the "Commitment Type" field, select, "DAS Fees."

A.2. In the "Company" field, type "Department of Administrative Services". Note that the Company Number will populate automatically as "DAS001".

A.3. Enter the Commitment Number, using the following format. Starting with "DAS001" (the "company number"), then type one dash. Then, excluding the "BI", "CF", etc. and all other dashes, enter the project number as shown.

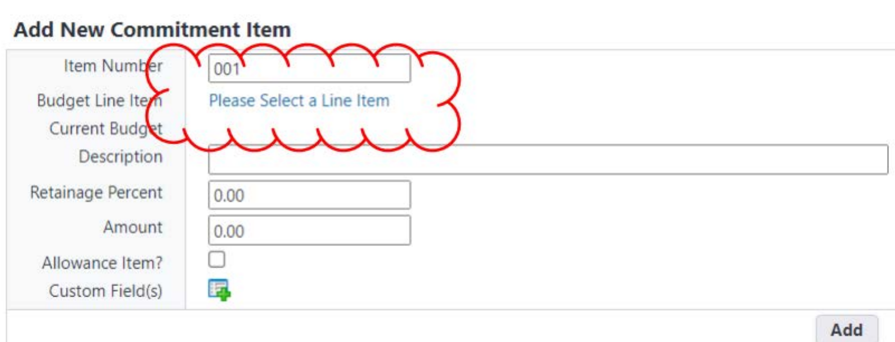


A.4. In the "Description" field, type a prose description, such as, "DAS Fees on project 3B-126." The "Unit Cost Options" field should not be changed.

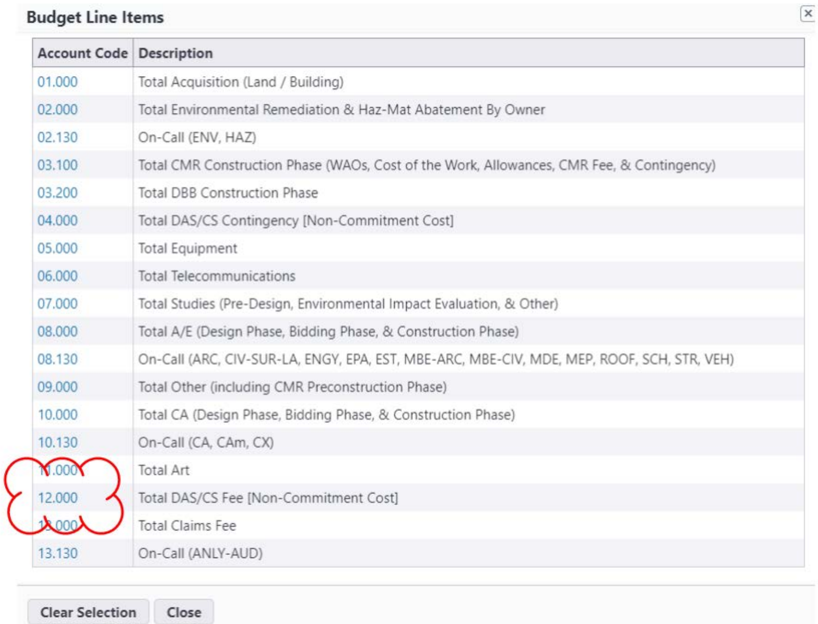
B. Add New Commitment Item

Under the "Add New Commitment Item" section:

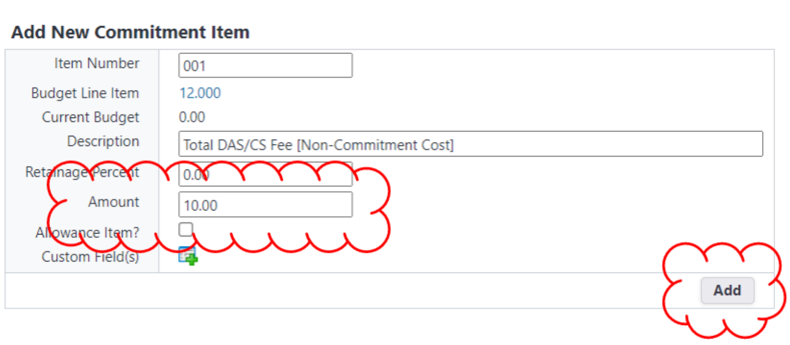
B.1. Click on "Please Select a Line Item". This is where the Cost Code is selected.



B.2. Click on Cost Code 12.000.



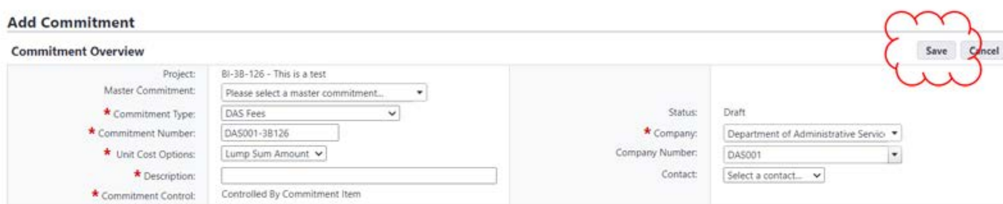
B.3. Enter the Amount to be committed to DAS fees, at least initially, and then click “Add”.



C. Commitment Items

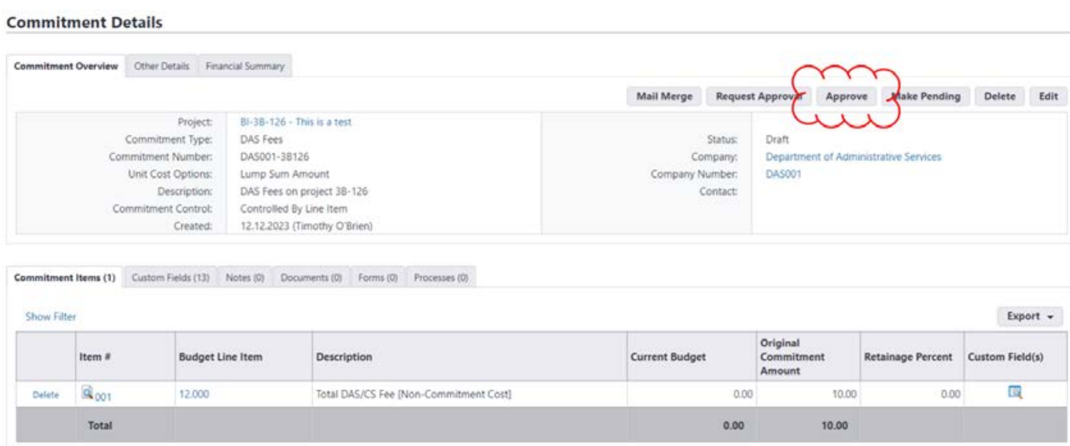
Under the “Commitment Items” section, confirm that the information is correct. Any fields with a pencil next to them can be opened for editing by clicking on the “pencil”. For example, to edit the Amount, click on the pencil next to that number, change the number and click in any blank area of the form to allow it to update.

C.1. If the information is correct, click “Save.”



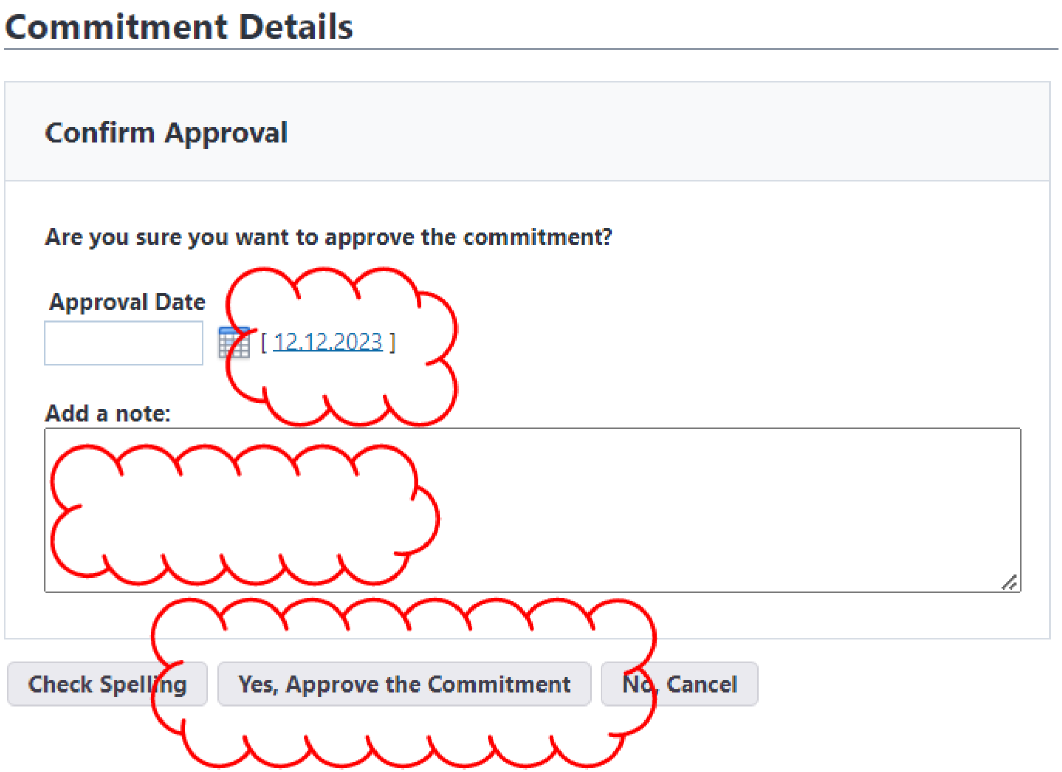
C.2. Saving the draft commitment leads to a pre-approval summary screen. Before the commitment can be used, it must be approved, which Project Managers can do.

a. To approve the DAS fees commitment, click, “Approve.”



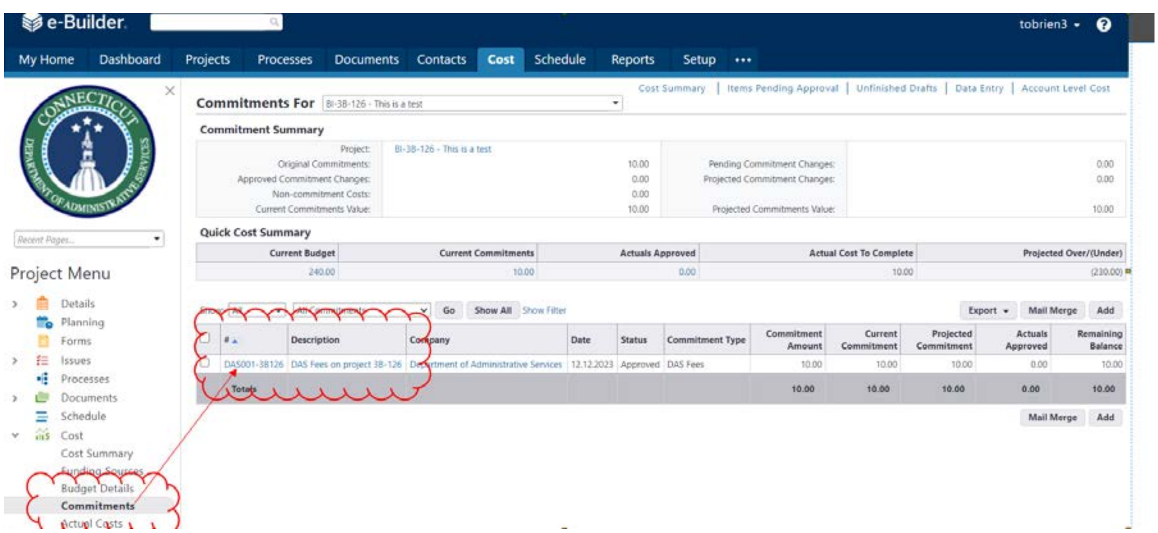
b. In the next screen, click on the date hyperlink to populate an approval date or enter an “Approval Date.” Enter a note, if applicable.

Then either click “Yes, Approve the Commitment” to approve or “No, Cancel” to return back to the screen with the commitment as a draft.

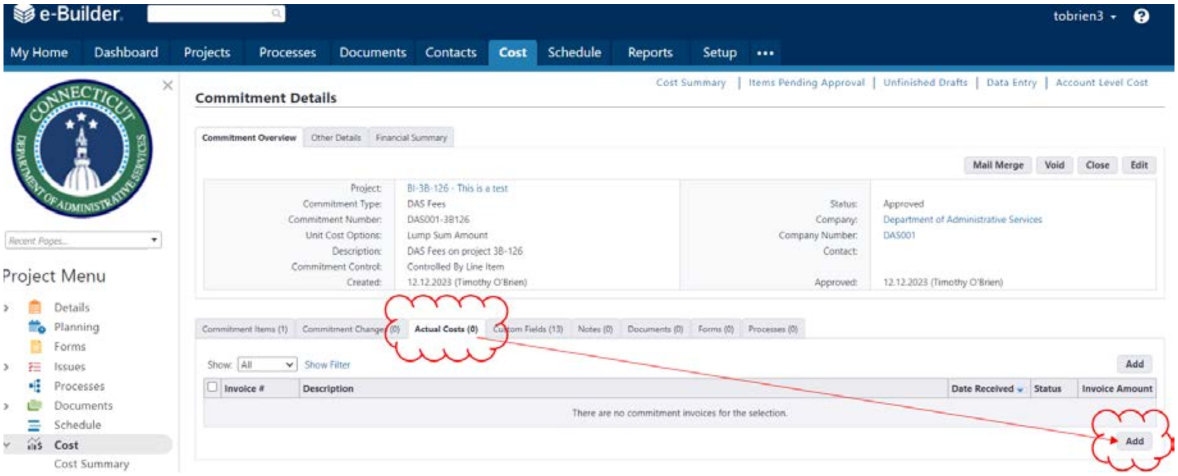


5A.03 Entering DAS Fees Actual Costs

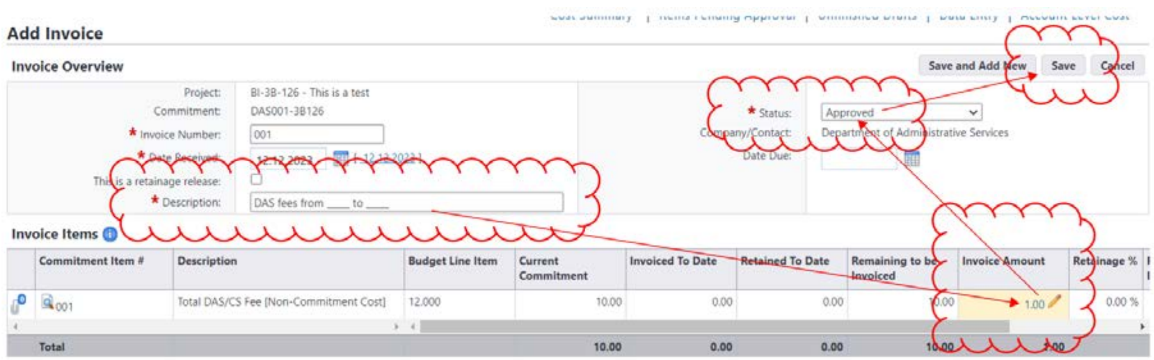
1. Under Costs > Commitments, click on the commitment number of the DAS fees commitment.



2. Click on the “Actual Costs” tab and then click on the “Add” button.

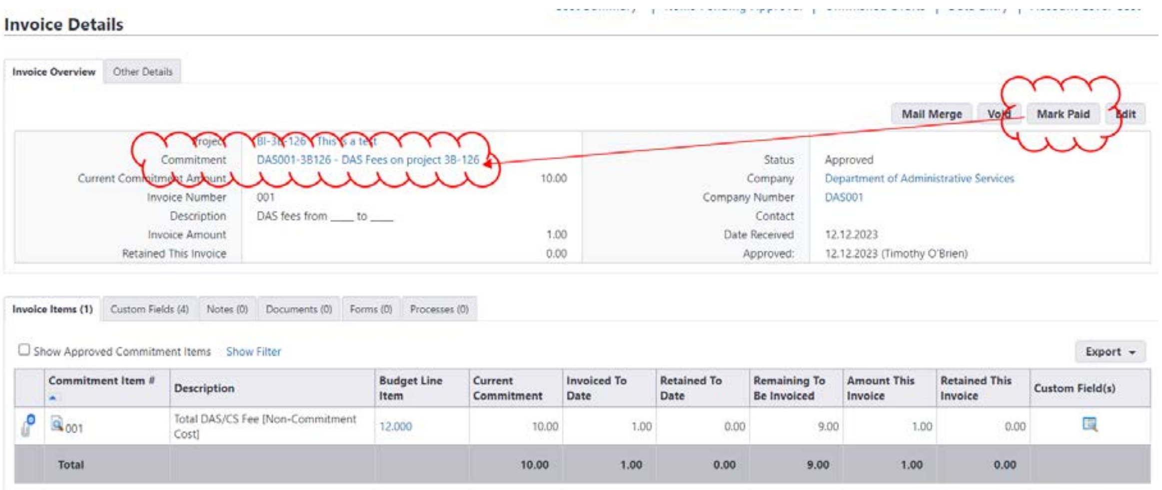


3. Enter a description of the actuals record in the “Description” field. Under “Invoice Amount,” enter the amount of new DAS fees to record, then toggle “Status” to Approved” and then click “Save”.

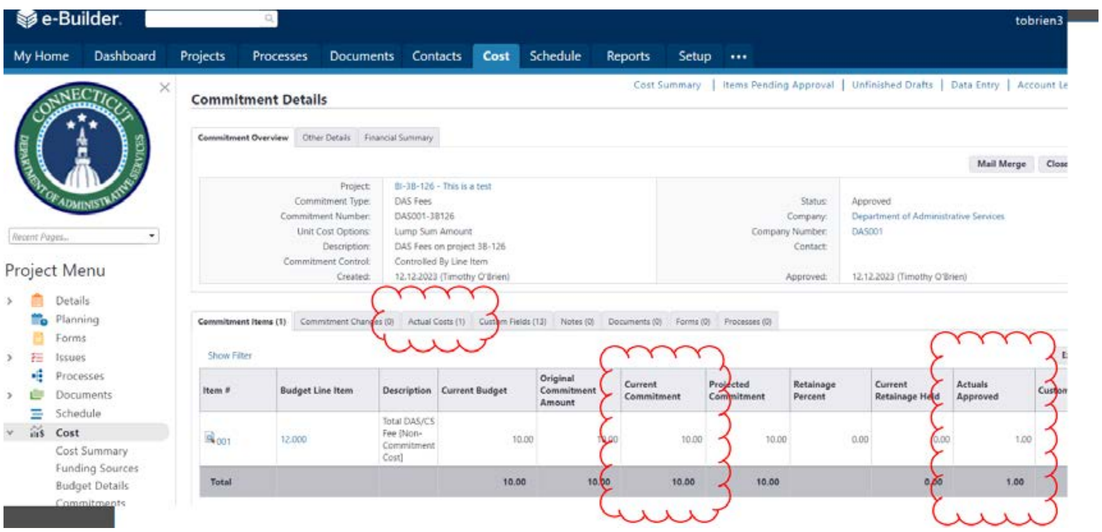


4. In the next screen, click on the date hyperlink to populate an “Approval Date” or enter an “Approval Date.” Then click “Yes, Approve the Invoice” to approve or click “No, Cancel” to return to the draft screen.

5. If approved, the "Invoice Details" page will open to display the actual cost. Click "Mark Paid" to approve (which includes approval under another approve screen). Click the link next to "Commitment" to return to the record for the commitment.



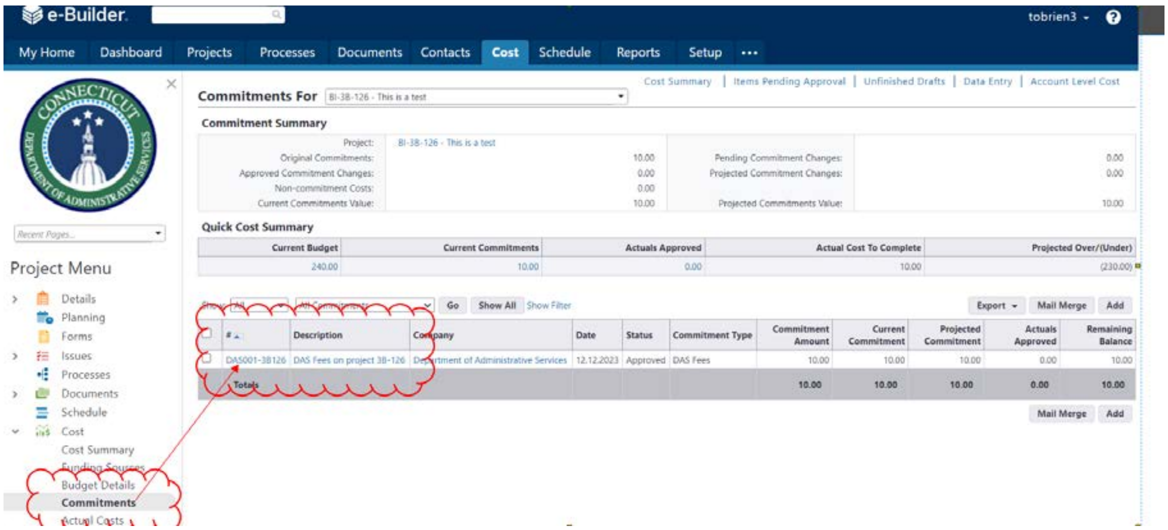
6. The Commitment Details page shows information about the commitment record, including the Current Commitment amount, the Actuals Approved and has a tab to show the Actual Costs entries against that commitment.



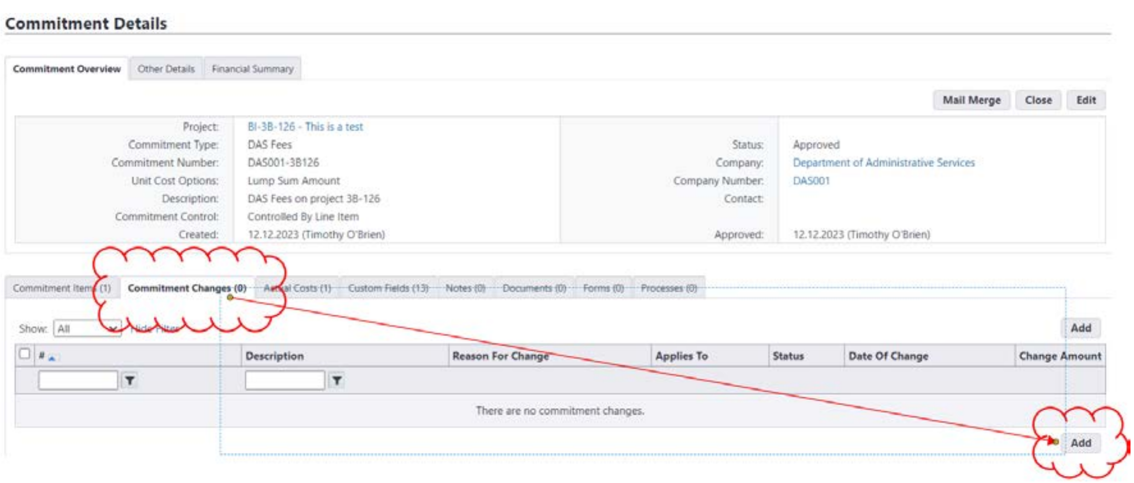
5A.04 Manually Entering a Commitment Change

To manually change a commitment amount for the DAS fees commitment on a project, proceed as follows:

1. Under Costs > Commitments, click on the commitment number of the DAS fees commitment.

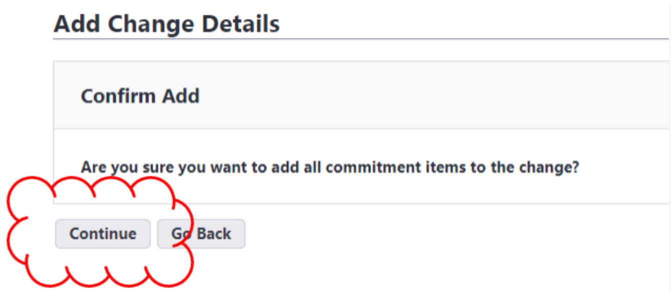


2. That leads to the "Commitment Details" screen. On that screen, under the "Commitment Changes" tab, click "Add."

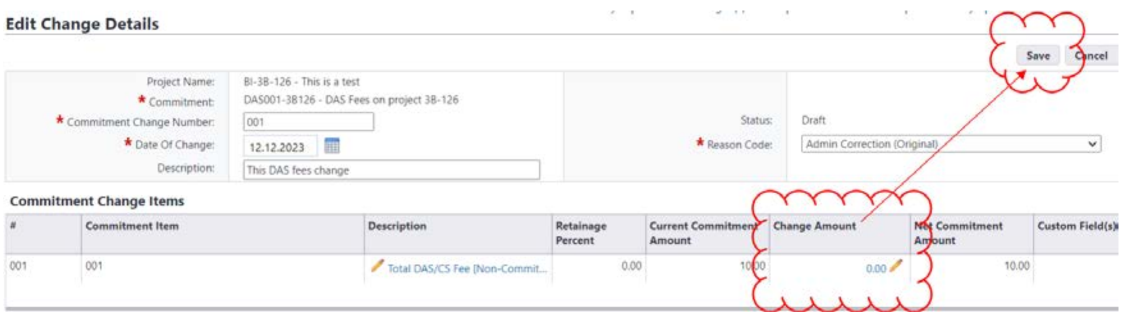


3. On the "Add Change Details" page, enter a Description, select the correct change "Reason Code" and click "Save and Add All Items."

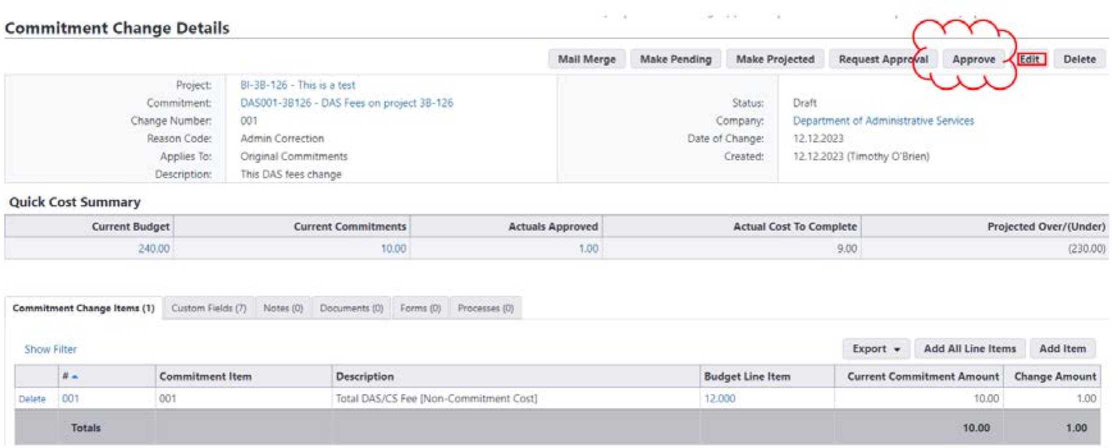
4. On the next screen, click “Continue.”



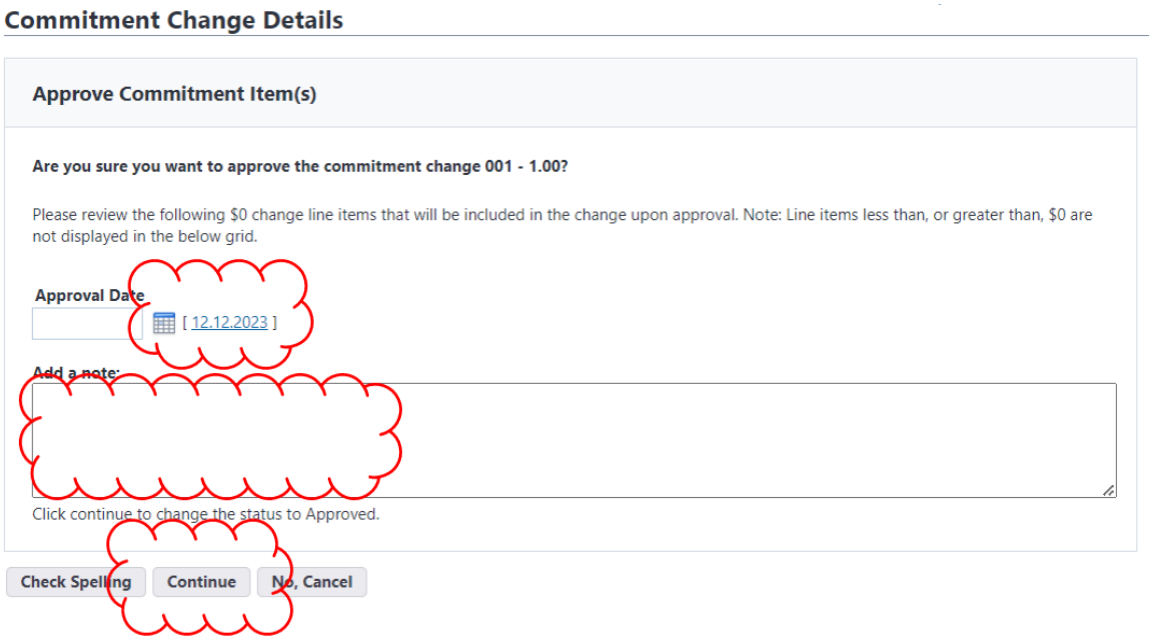
5. Under “Change Amount,” enter a positive or negative number for the “Change Amount” and click “Save.”



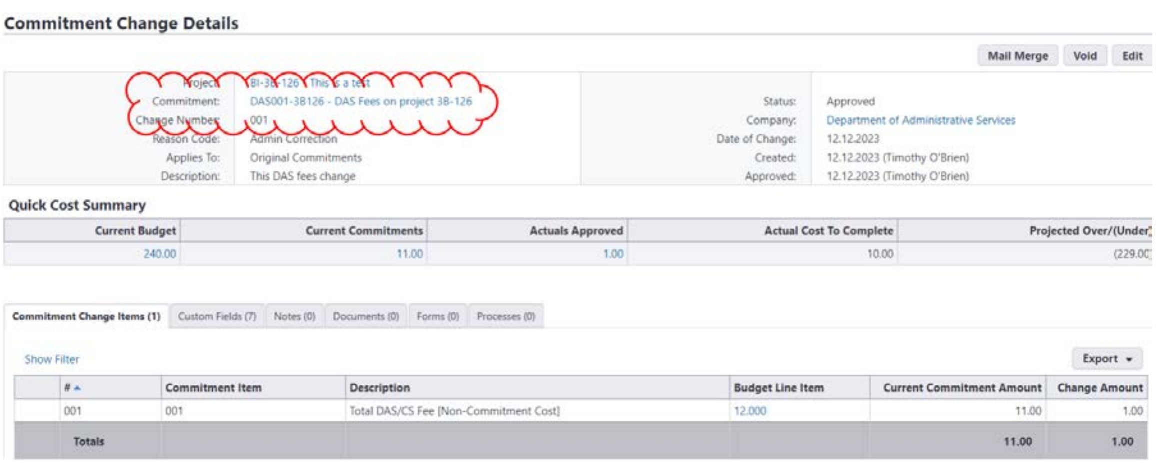
6. To approve the commitment change, click “Approve.” Click “Edit” to return to the draft commitment change for further editing.



7. If approved, click on the date hyperlink to populate an "Approval Date" or enter an "Approval Date." Enter a note, if applicable, and click "Continue" to approve, or "No, Cancel" to return to the commitment change as a draft.



8. If "Continue", the Commitment Change Details page will open, which is the record of that commitment change. To return to the commitment, itself, click on the commitment number next to label for "Commitment."



Section 5B: PM Creation of Other Commitments

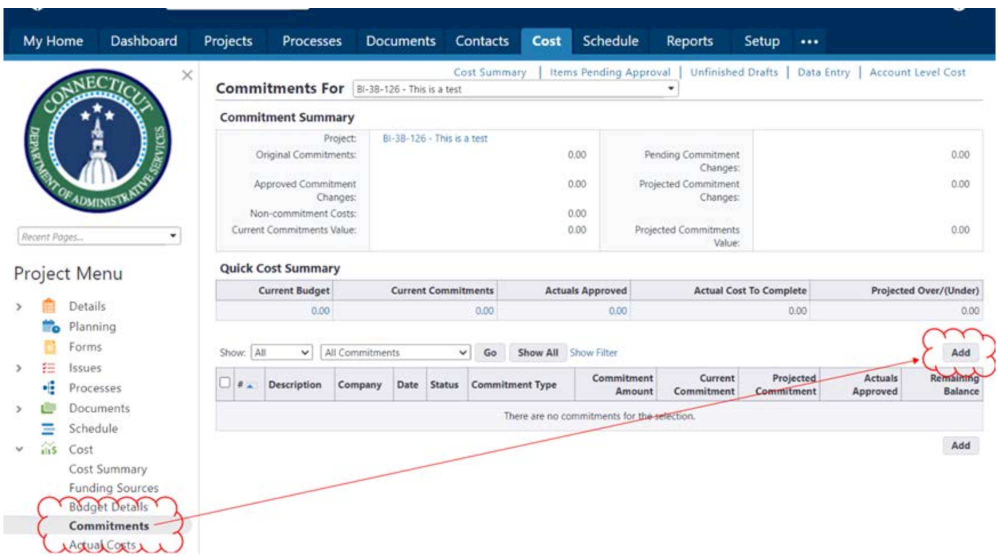
Generally, commitments are entered by Construction Support Services as part of established procedures. There are some circumstances, generally when the commitment was approved prior to the migration into e-Builder, when a commitment record may need to be entered manually. PM's are encouraged to contact Construction Support Services before doing this in order to avoid the creation of conflicting records. Additionally, Construction Support Services is available to assist project managers in performing this function, should the need arise. The below are instructions for how to create a commitment.

5B.01 Accessing the project

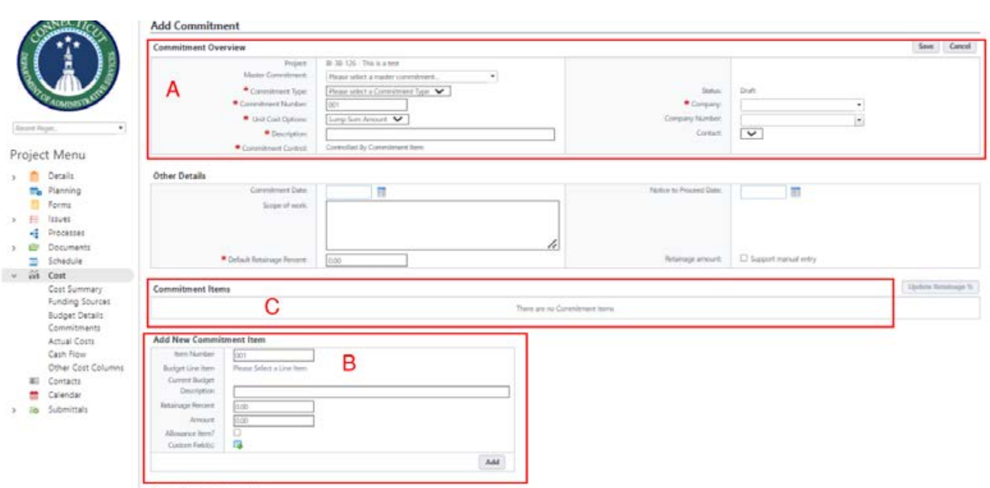
Follow the instructions provided in Section 1 to Access the Project.

5B.02 Creating a Commitment Record

1. After opening the project record, click "Cost", under the "Project Menu", then click "Commitments". To add a new commitment, click, "Add."



2. That brings up the draft Commitment form. This description will concern three different parts of that form (labeled A, B and C, below):



A. Add Commitment

A.1. Enter the “Commitment Type” field. Ensure that “CMR GMP” is selected for CMR GMP commitments, and that “Prime Contractor Contract” is selected for DBB GC commitments. The other options are for consultants and other commitments.

A.2. In the “Company” field, type “Department of Administrative Services”. Note that the Company Number will populate automatically as “DAS001”.

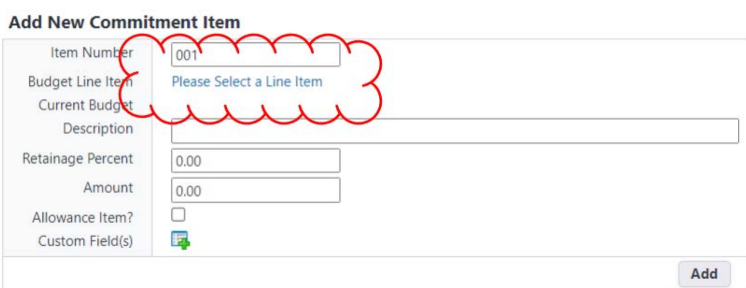
A.3. Enter the Commitment Number, using the following format. Starting with “DAS001” (the “company number”), then type one dash. Then, excluding the “BI”, “CF”, etc. and all other dashes, enter the project number as shown.

A.4. In the “Description” field, type a prose description, such as, “DAS Fees on project 3B-126.” The “Unit Cost Options” field should not be changed.

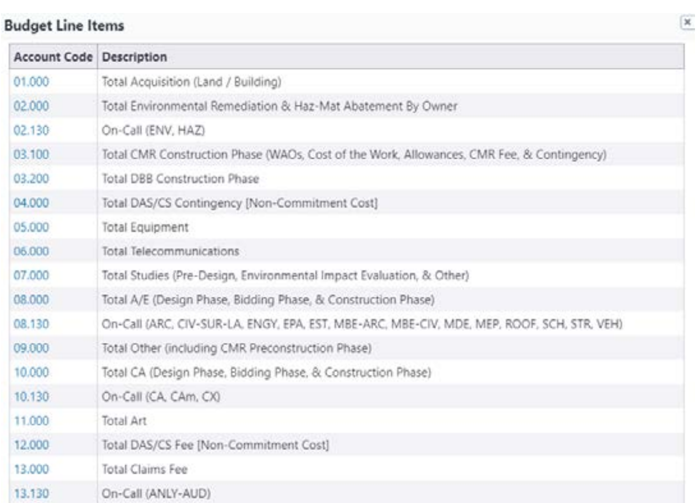
B. Add New Commitment Item

Under the “Add New Commitment Item” section:

B.1. Click on “Please Select a Line Item”. This is where the Cost Code is selected.

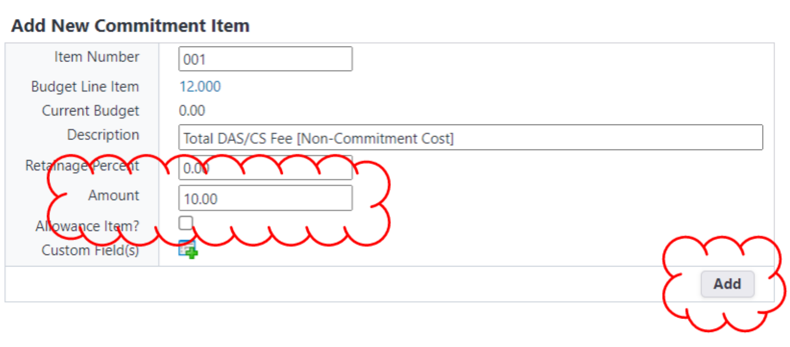


B.2. Click on the applicable Cost Code.


Budget Line Items

Account Code	Description
01.000	Total Acquisition (Land / Building)
02.000	Total Environmental Remediation & Haz-Mat Abatement By Owner
02.130	On-Call (ENV, HAZ)
03.100	Total CMR Construction Phase (WAOs, Cost of the Work, Allowances, CMR Fee, & Contingency)
03.200	Total DBB Construction Phase
04.000	Total DAS/CS Contingency [Non-Commitment Cost]
05.000	Total Equipment
06.000	Total Telecommunications
07.000	Total Studies (Pre-Design, Environmental Impact Evaluation, & Other)
08.000	Total A/E (Design Phase, Bidding Phase, & Construction Phase)
08.130	On-Call (ARC, CIV-SUR-LA, ENGY, EPA, EST, MBE-ARC, MBE-CIV, MDE, MEP, ROOF, SCH, STR, VEH)
09.000	Total Other (including CMR Preconstruction Phase)
10.000	Total CA (Design Phase, Bidding Phase, & Construction Phase)
10.130	On-Call (CA, CAm, CX)
11.000	Total Art
12.000	Total DAS/CS Fee [Non-Commitment Cost]
13.000	Total Claims Fee
13.130	On-Call (ANLY-AUD)

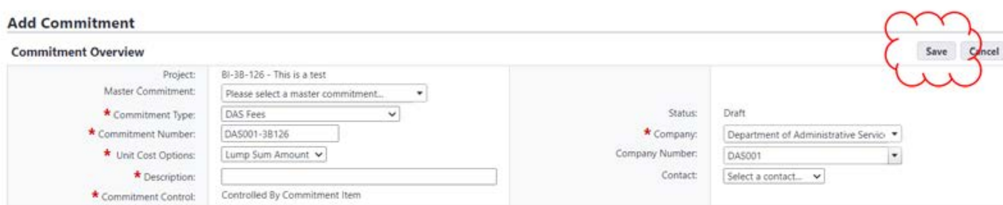
B.3. Enter the Amount to be committed and then click “Add”.



C. Commitment Items

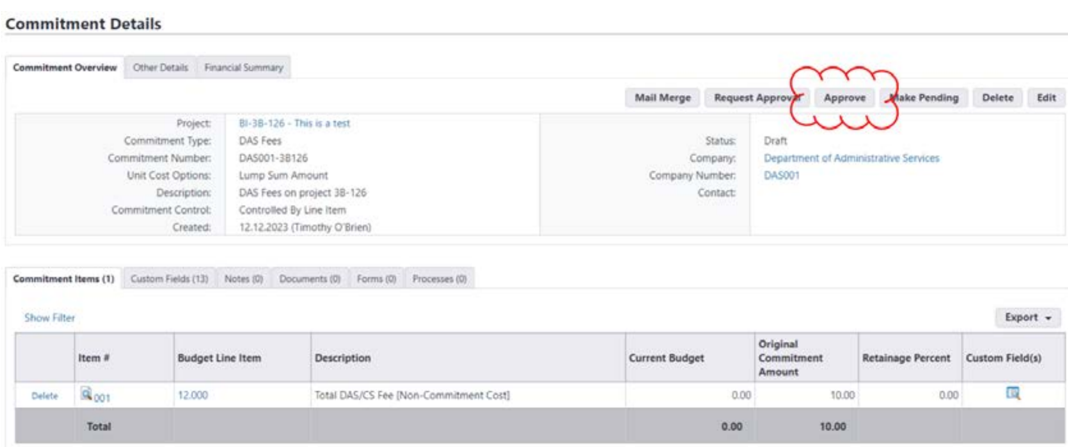
Under the “Commitment Items” section, confirm that the information is correct. Any fields with a pencil next to them can be opened for editing by clicking on the “pencil”. For example, to edit the Amount, click on the pencil next to that number, change the number and click in any blank area of the form to allow it to update.

C.1. If the information is correct, click “Save.”

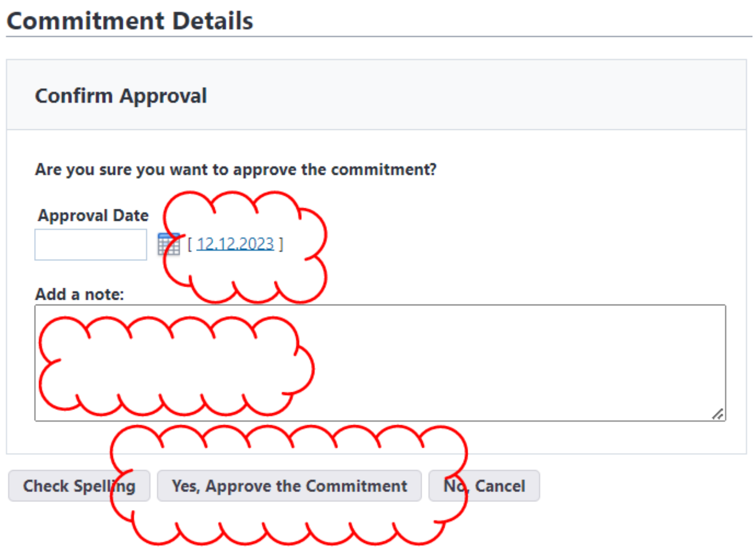


C.2. Saving the draft commitment leads to a pre-approval summary screen. Before the commitment can be used, it must be approved, which Project Managers can do.

a. To approve the DAS fees commitment, click, “Approve.”



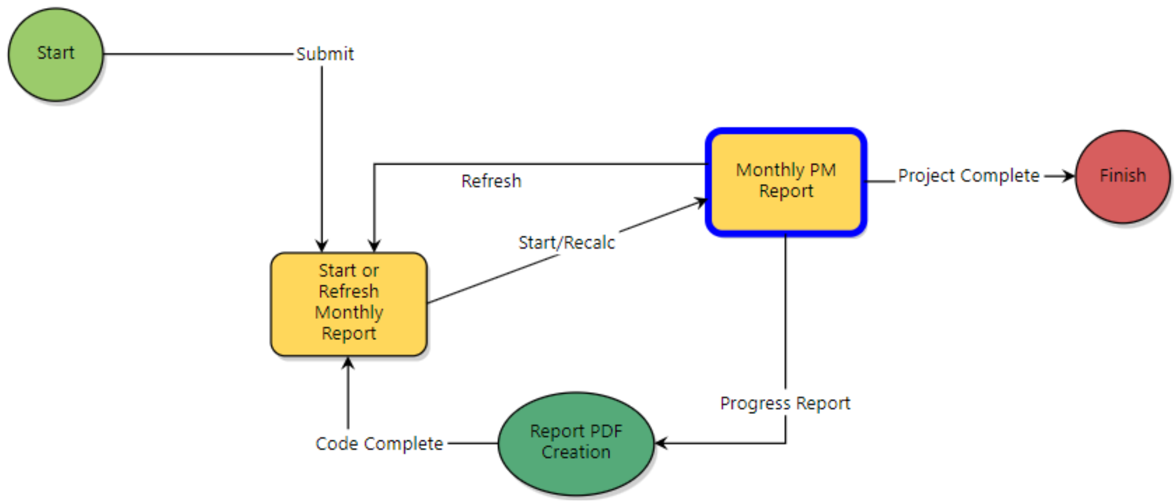
b. In the next screen, click on the date hyperlink to populate an approval date or enter an "Approval Date." Enter a note, if applicable. Then either click "Yes, Approve the Commitment" to approve or "No, Cancel" to return back to the screen with the commitment as a draft.



Section 5C: Cost To Date Report

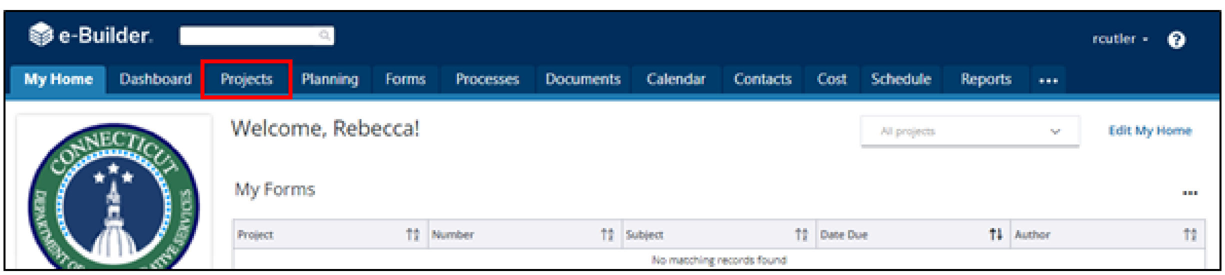
5C.01 Coming Soon

Section 6: Project Manager Monthly Reports

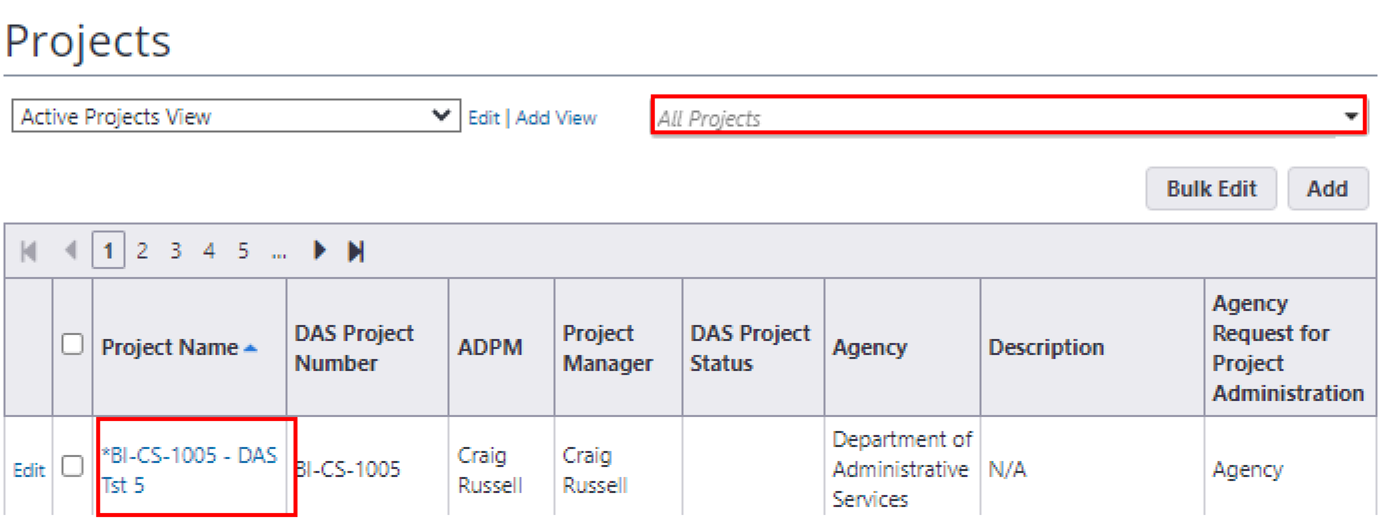


6.01 Accessing the project

Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the “Projects” tab:



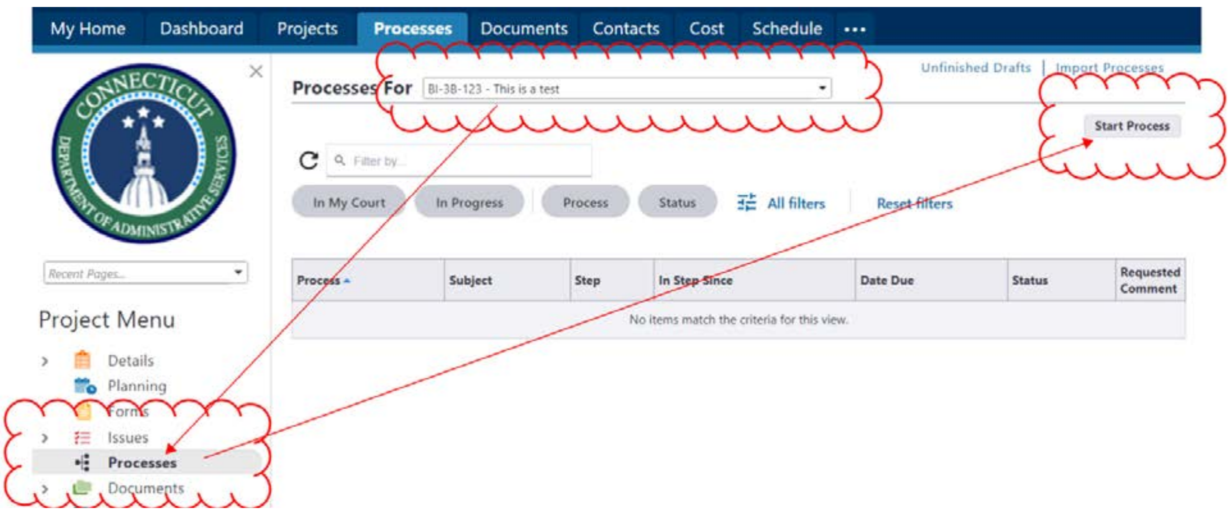
Search for your project by entering the project number into the “All Projects” search box or by looking for it under the list that appears below on this screen, then click on your project to bring up the “Project Details” page.



Note: The Project Manager Monthly Status Report process only requires one process instance per project. Proceed to Section 6.02 for the first monthly report submission. For each subsequent report submission, begin at Step 6.03.

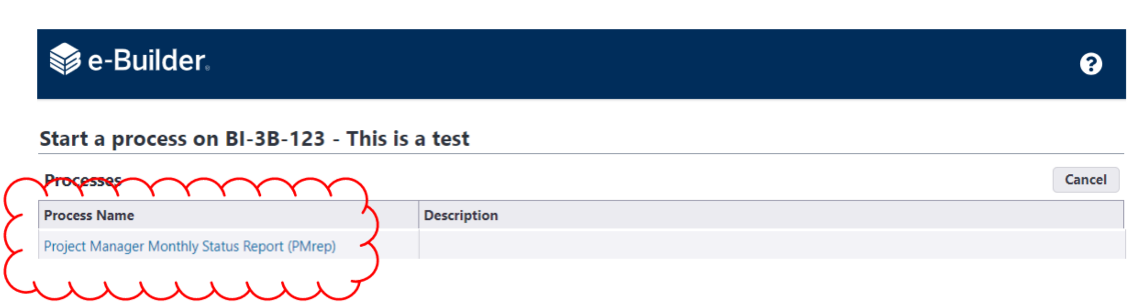
6.02 Starting the Project Manager Monthly Status Report process (One time per project).

Within the project's record, go to the Processes module in the Project Menu. Then click on the "Start Process" button.

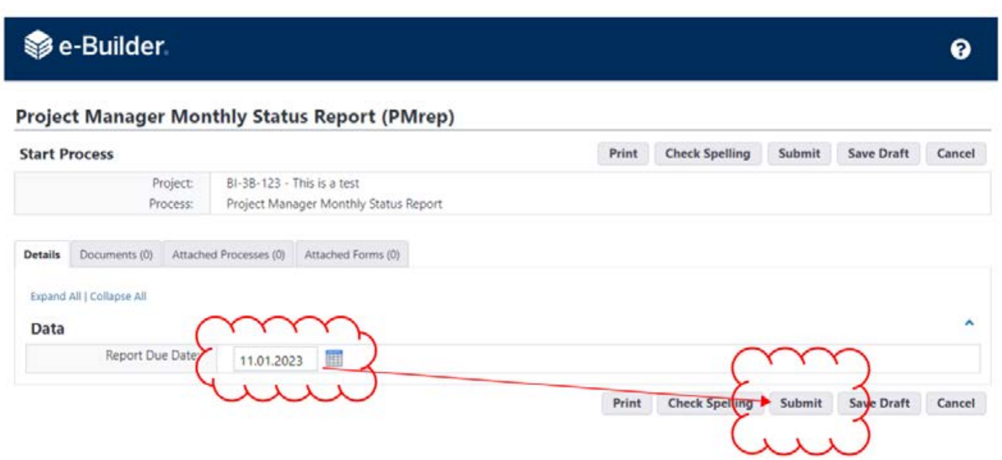


Note: If you do not see all of your projects, contact Tim O'Brien to gain access to them in e-Builder.

Click on the "Project Manager Monthly Status Report (PMrep)" process.

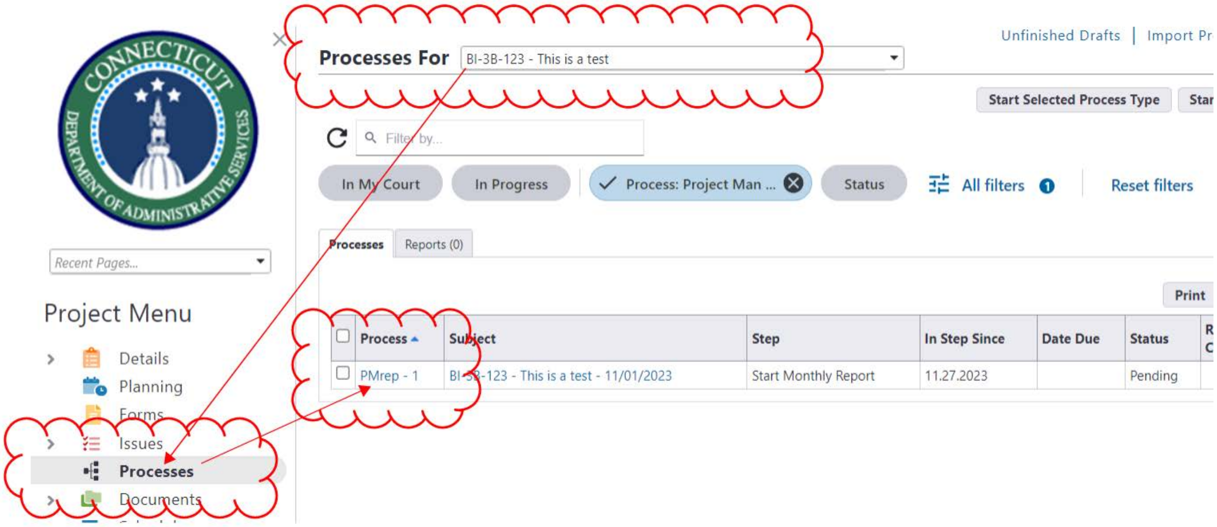


Enter the due date of the first project report on this project in e-Builder and then click Submit.

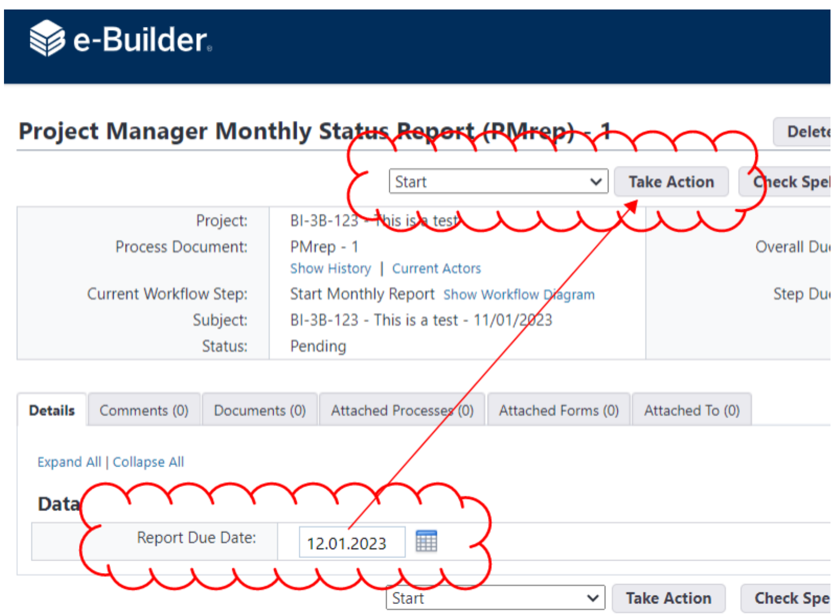


6.03 Starting a second or subsequent project status report.

Within the project's record, go to the Processes module in the Project Menu, then click on the Process number (probably "PMrep - 1") to re-open the process instance.

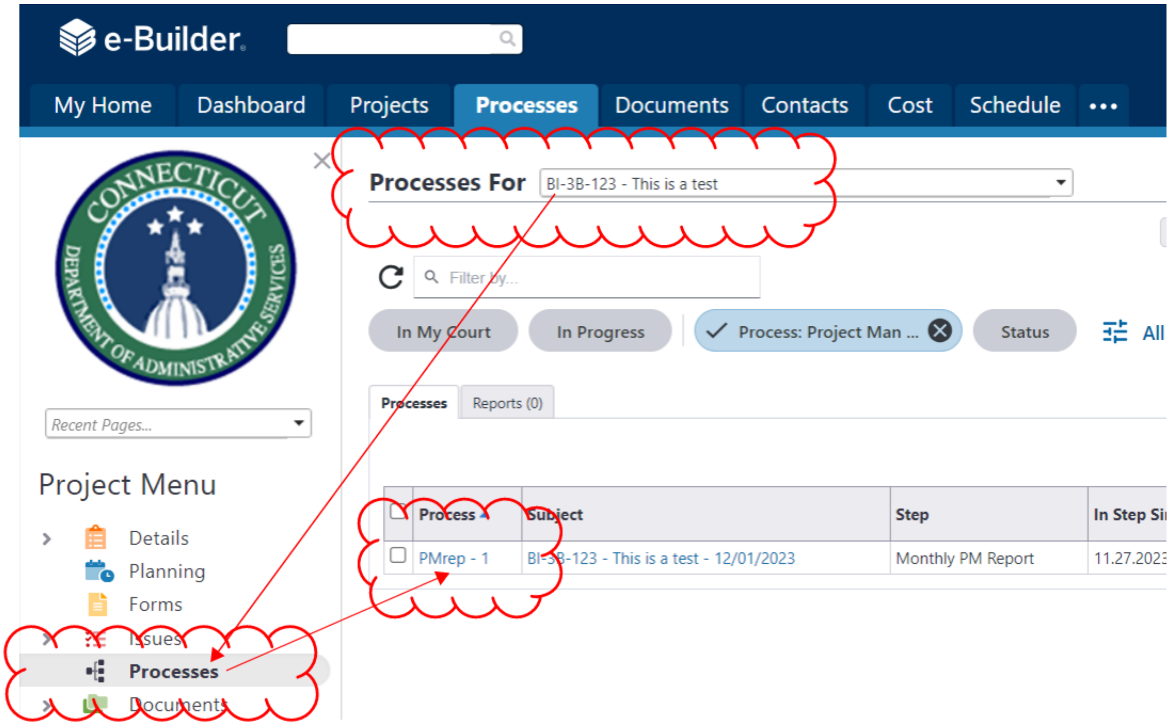


Enter the due date of the current report and then click "Take Action". Note that the only workflow action available will be to Start. (4/30/2024: The "Take Action" item now says "Start/Refresh" rather than "Start".



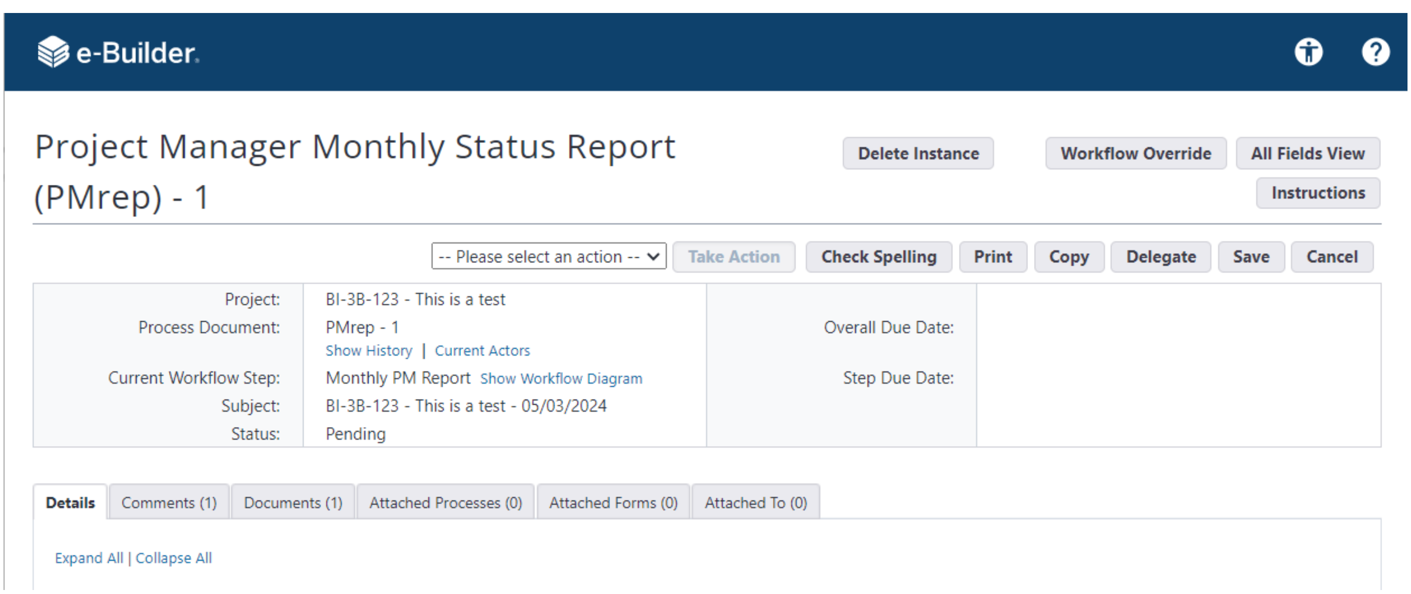
6.04 Completing the monthly report form

Access the process instance for what should be the one instance of the "Project Manager Monthly Status Report (PMrep)" process.



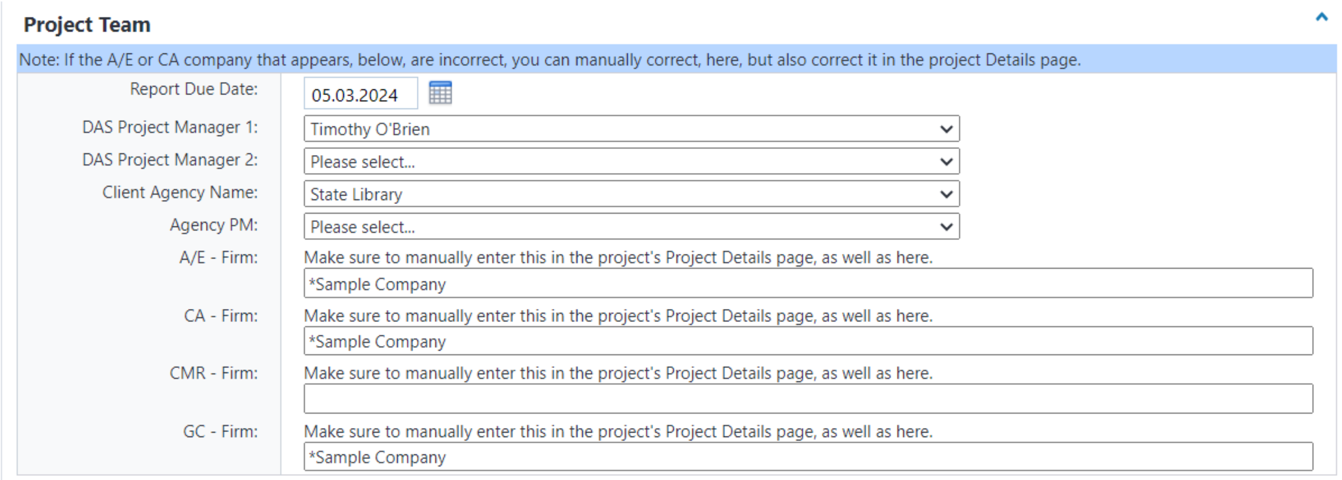
Complete the monthly update form.

Note: If a monthly report was completed in the previous month for the subject project, the information from that month's report will still be included in the current report form, except that, if there were any manual updates to the project details during that month, i.e. project status or budget information updates, those updates should have refreshed and be included in the updated information.



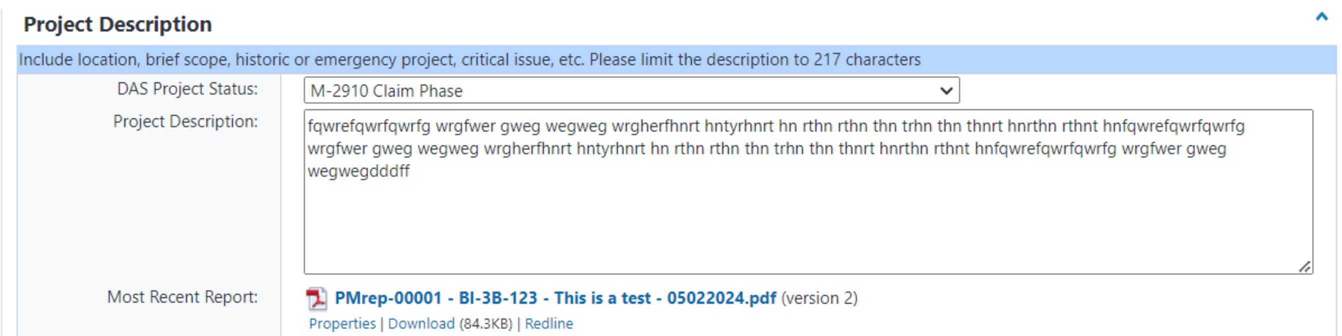
In the “Project Team” section of the form:

- “Report Due Date” is the same field available for entry in the previous workflow step, but it can be corrected, here. It refers to the date the current report is due. It will also cause e-Builder to generate a PDF file that is saved separately from other months reports, with the date entered, here, appearing in the file name. For example 05/01/2024 will appear at the end of the filename as “05012024”.
- “DAS Project Manager 1” is the main DAS Project Manager for the project. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “DAS Project Manager 2” can be used to note an Associate or Assistant Project Manager working on the project or a second Project Manager, if two are assigned. This is kept in the Project Manager Monthly Report, but is not updated to the Project Details page.
- “Client Agency Name”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “Agency PM”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, and if changed to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “A/E - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will <u>not update in the Project Details page</u> for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “CA - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will <u>not update in the Project Details page</u> for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “CMR - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will <u>not update in the Project Details page</u> for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “GC - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will <u>not update in the Project Details page</u> for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.



In the "Project Description" section:

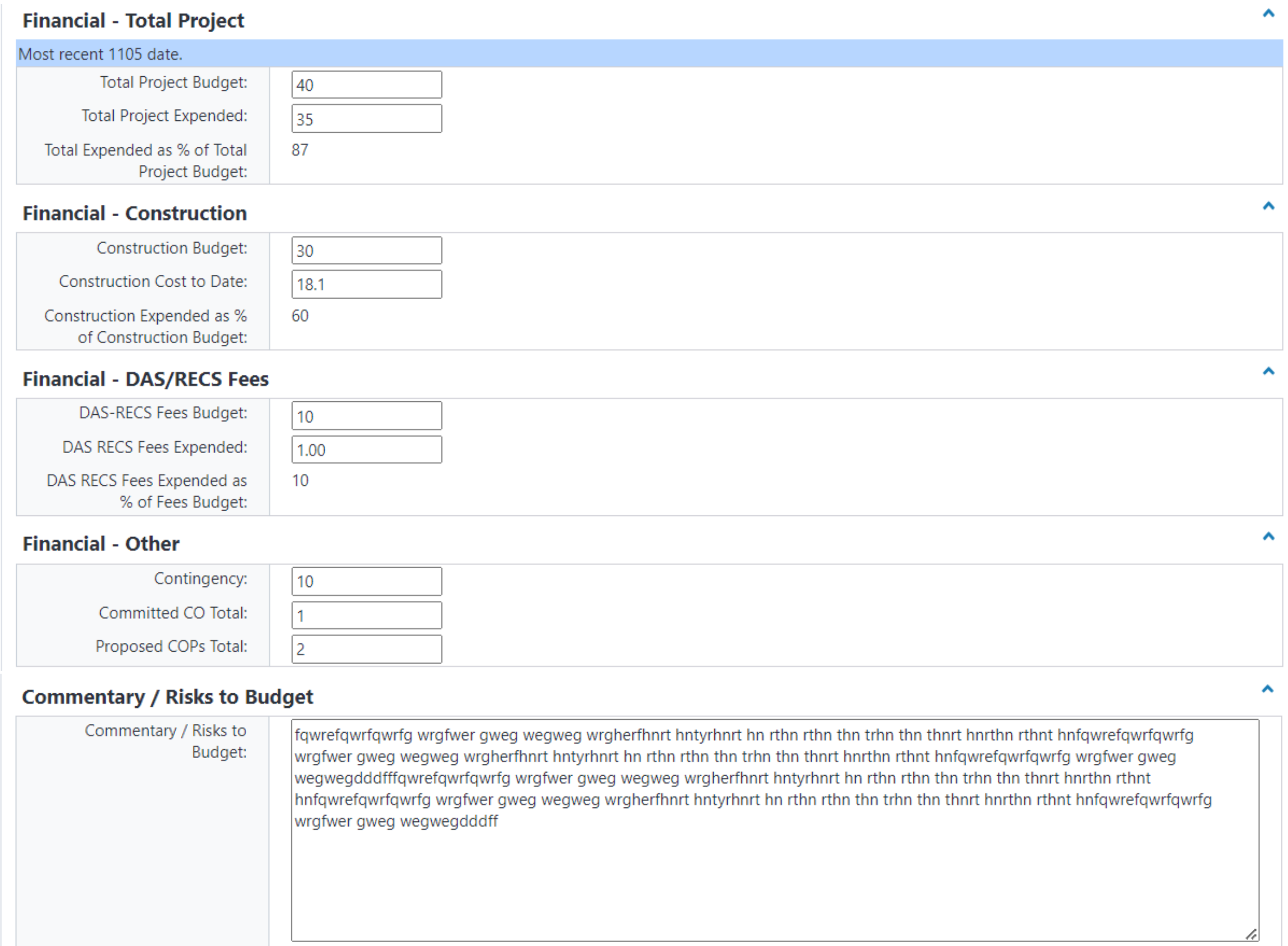
- "DAS Project Status". This is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "Project Description". This is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project (in this case, the "Description" field in the header of the Project Details page), and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "Most Recent Report" is the PDF of the most recently generated report from the Project Manager Monthly Report process for this project prior to the one currently being completed.



In the "Financial" section:

- "Total Project Budget" is the total project budget on the most current approved 1105. This is manually updated by the PM. However, this is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "Total Project Expended" should automatically update, based on the total approved invoices (actuals) in the Cost module for the project.

- “Total Expended as % of Total Project Budget” will automatically calculate, based on the previous two values. If the PM makes changes to “Total Project Budget”, the PM can cause this to recalculate by using the “Refresh” Action in this workflow step and then the “Start/Refresh” in the following step.
- “Construction Budget” is the value for construction from the most recently approved 1105. This is manually input and updated by the PM. However, this is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “Construction Cost to Date” should automatically update, based on the total approved contractor Payment Applications. However, the PM should check to ensure that it is correct, and may change this value, if it is incorrect. Note that this is the approved invoice amount, after retainage.
- “Construction Expended as % of Construction Budget” will automatically calculate, based on the previous two values. If the PM makes changes to either of those two values, the PM can cause this to recalculate by using the “Refresh” Action in this workflow step and then the “Start/Refresh” in the following step. That will cause the workflow to return to this step, with this percentage recalculated.
- “DAS-RECS Fees Budget” is the amount of cost code 12 on the current approved 1105. This is manually updated by the PM. However, this is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “DAS RECS Fees Expended” is the current total amount of cost code 12 fees charged against the project and is manually updated by the PM.
- “DAS RECS Fees Expended as % of Fees Budget” will automatically calculate, based on the previous two values. If the PM makes changes to either of those two values, the PM can cause this to recalculate by using the “Refresh” Action in this workflow step and then the “Start/Refresh” in the following step. That will cause the workflow to return to this step, with this percentage recalculated.
- “Contingency” is the current unexpended 04 Contingency, and is manually updated by the PM.
- “Committed CO Total” should automatically update, based on the net of approved Change Orders. However, the PM should check to ensure that it is correct, and may change this value, if it is incorrect.
- “Proposed COPs Total” is manually updated by the PM.
- “Commentary / Risks to Budget” is manually updated by the PM.



Financial - Total Project

Most recent 1105 date.

Total Project Budget:	40
Total Project Expended:	35
Total Expended as % of Total Project Budget:	87

Financial - Construction

Construction Budget:	30
Construction Cost to Date:	18.1
Construction Expended as % of Construction Budget:	60

Financial - DAS/RECS Fees

DAS-RECS Fees Budget:	10
DAS RECS Fees Expended:	1.00
DAS RECS Fees Expended as % of Fees Budget:	10

Financial - Other

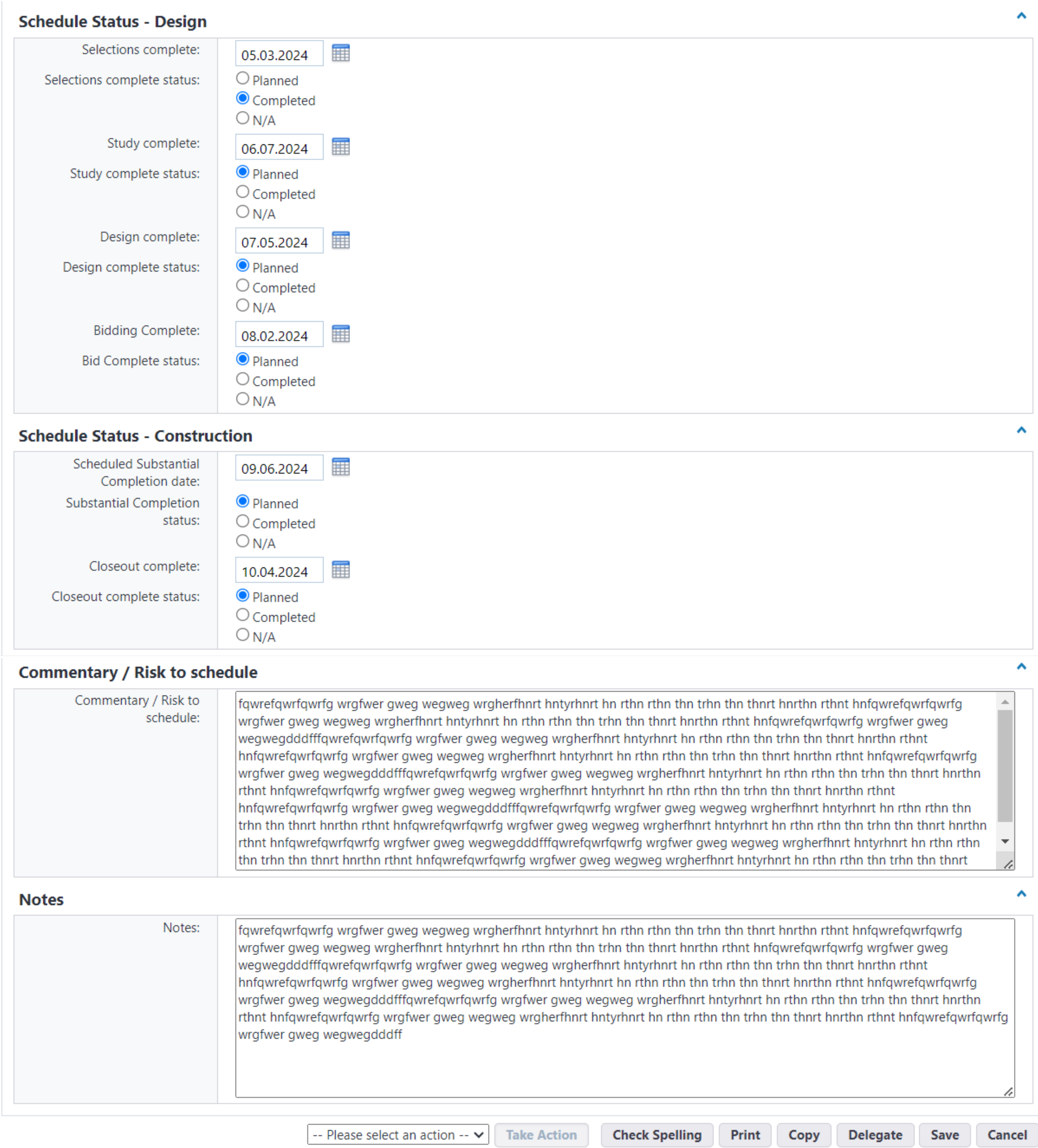
Contingency:	10
Committed CO Total:	1
Proposed COPs Total:	2

Commentary / Risks to Budget

Commentary / Risks to Budget:	fqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddff

In the "Schedule Status" sections:

- For the fields with dates, enter the current planned dates and check the circle indicating whether that the milestone is planned, compeleted or N/A.
- "Selections complete" is when selections are to be completed.
- "Study complete" is when any study included in the project is to be completed.
- "Design complete" is when all design phases are to be completed.
- "Bidding Complete" is when bidding is to be completed.
- "Scheduled Substantial Completion date" is when substantial completion is planned.
- "Closeout complete" is when the 7990 project closeout is to be completed.
- "Commentary / Risk to schedule" is manually updated by the PM.



Schedule Status - Design

Selections complete:	05.03.2024
Selections complete status:	○ Planned ◉ Completed ○ N/A
Study complete:	06.07.2024
Study complete status:	◉ Planned ○ Completed ○ N/A
Design complete:	07.05.2024
Design complete status:	◉ Planned ○ Completed ○ N/A
Bidding Complete:	08.02.2024
Bid Complete status:	◉ Planned ○ Completed ○ N/A

Schedule Status - Construction

Scheduled Substantial Completion date:	09.06.2024
Substantial Completion status:	◉ Planned ○ Completed ○ N/A
Closeout complete:	10.04.2024
Closeout complete status:	◉ Planned ○ Completed ○ N/A

Commentary / Risk to schedule

Commentary / Risk to schedule:

fqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt

Notes

Notes:

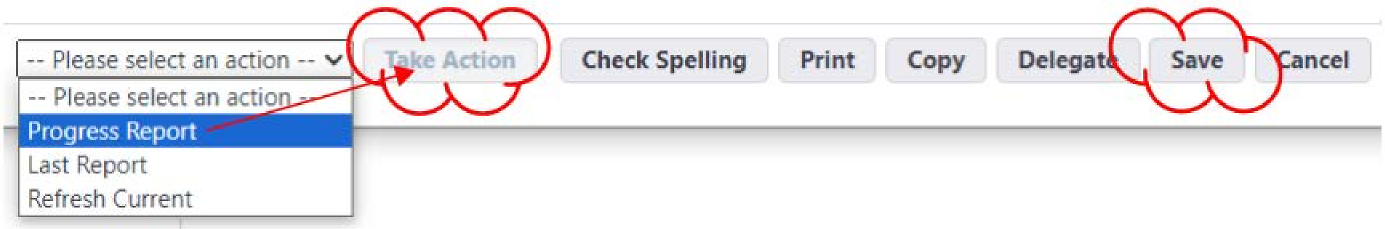
fqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddfffqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegweg wrgherfhnrt hntyrhnrt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrfqwrfg wrgfwer gweg wegwegdddff

-- Please select an action -- | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

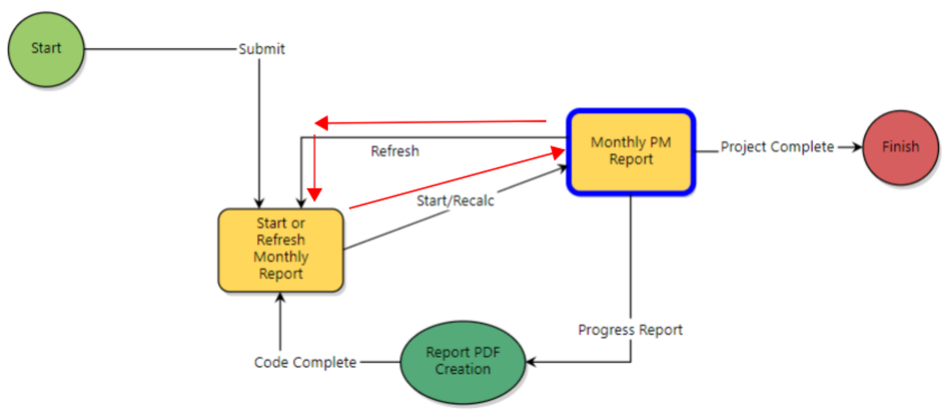
"Notes" are manually updated by the PM.

If the PM is unable to complete the report in one sitting, the PM can click the "Save" button to save a draft of the report. The PM can regain access to complete the draft report by returning to, and re-opening, the process instance.

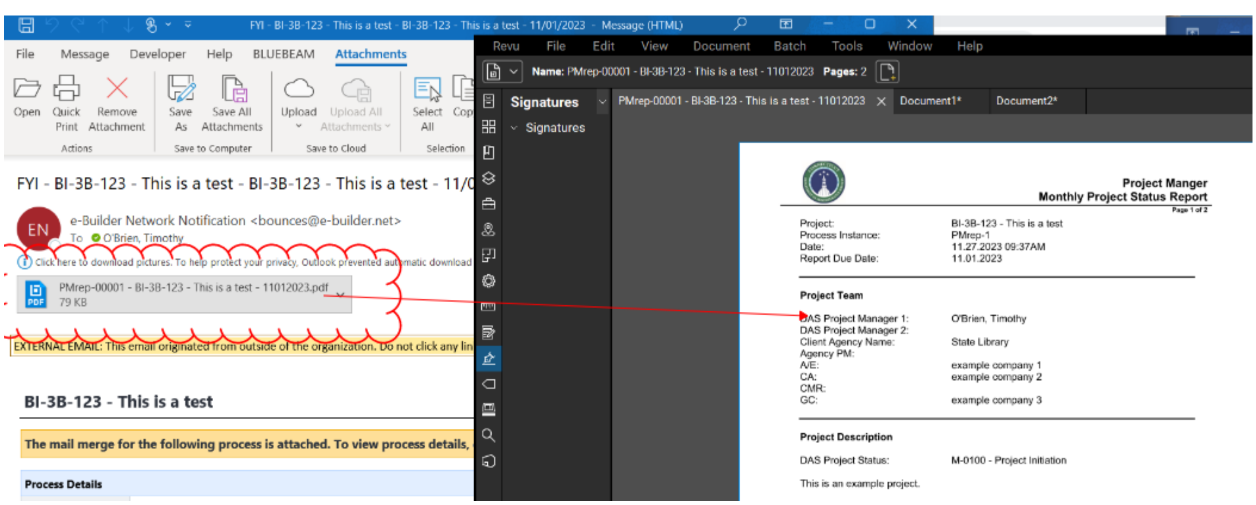
Upon completion of the monthly report, the PM should scroll down to the bottom of the page and select "Progress Report" (project is in process), "Last Report" (final monthly report at project closeout) or "Refresh Current" from the dropdown list next to the "Take Action" button and click the "Take Action" button.



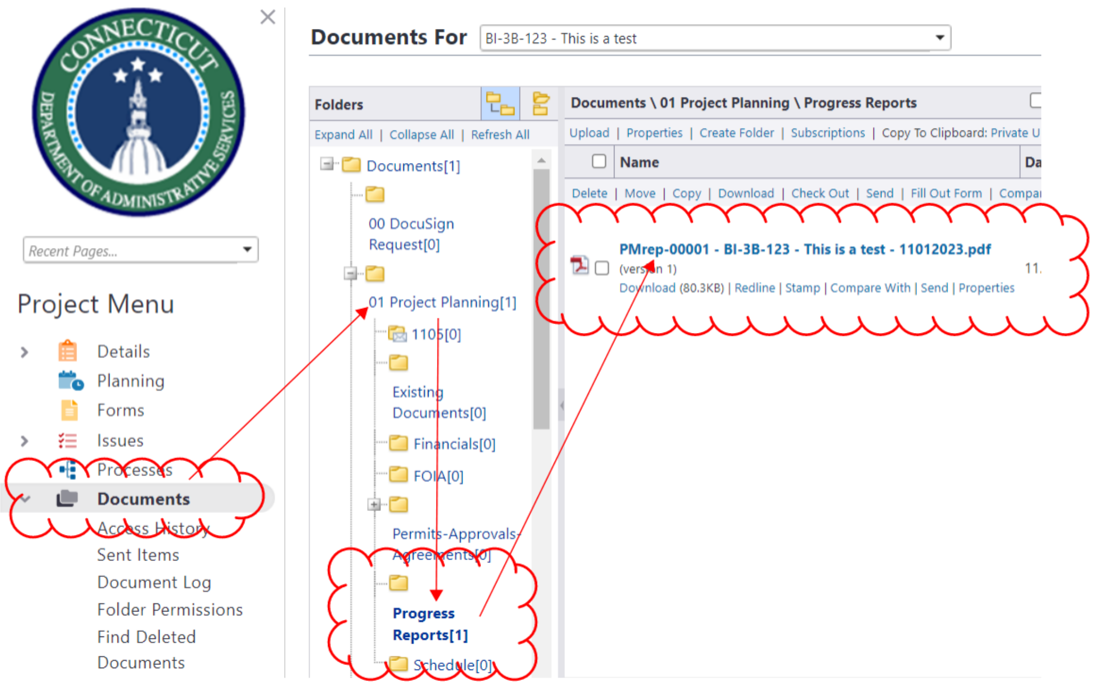
The "Refresh Current" option has the effect of sending the workflow back a step, from the "Monthly PM Report" step, where the PM report form is filled out, to the "Start or Refresh Monthly Report" step. The process instance will then close. When the PM re-opens it from the Processes module in the project, it will be in the "Start or Refresh Monthly Report" step, which only allows editing of the report date. However when the PM takes the "Start/Recalculate" Action, the workflow will recalculate calculated fields and refresh certain other fields. The process instance will close again. When the PM re-opens it in the Processes module for the project, the instance will be in the "Monthly PM Report" step, with all of the report fields updated. This "Refresh" option can be taken as many times as the PM requires.



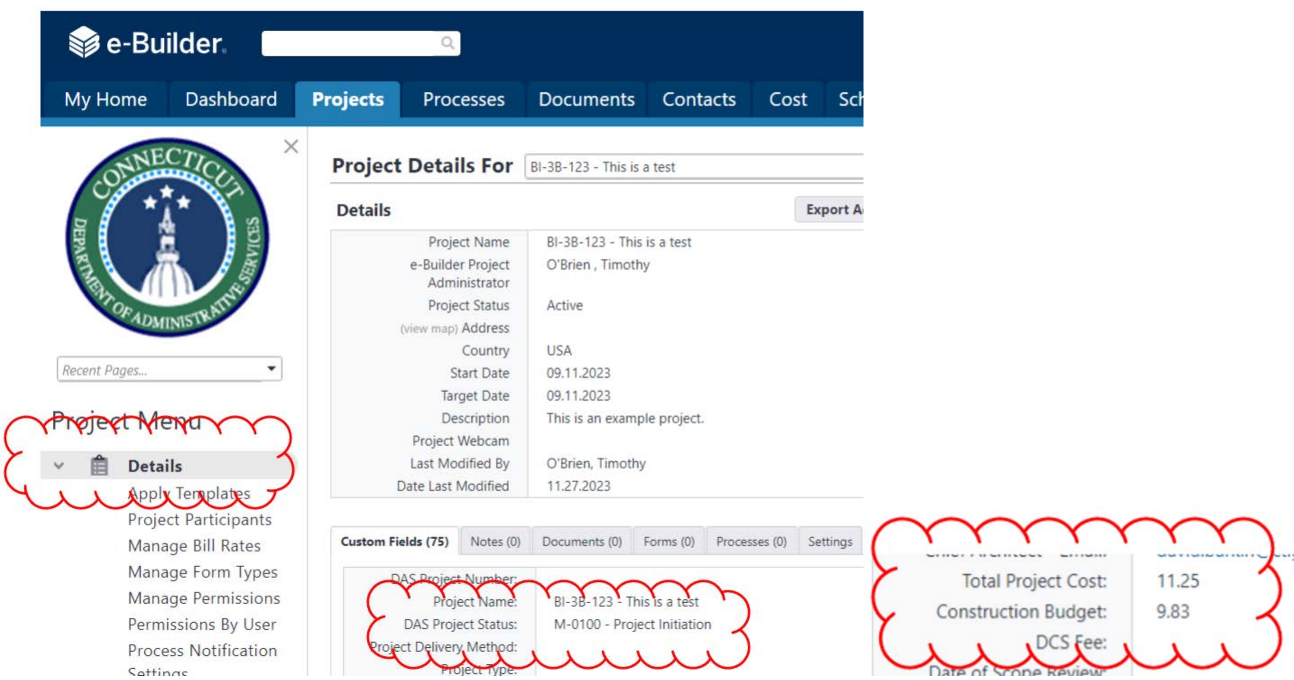
When the "Progress Report" or "Last Report" Action is taken, the ADPM and PM on the project should receive an email notification with a PDF of the report attached.



This file should also appear in the project's Documents module in e-Builder, in the 01 Project Planning > Progress Reports folder. Note that the number at the end of the file name indicates the due date of this report.



In the project's Details page, certain, but not all, fields will be updated from what was entered into the monthly report, such as DAS Project Status, Total Project Cost and Construction Budget.



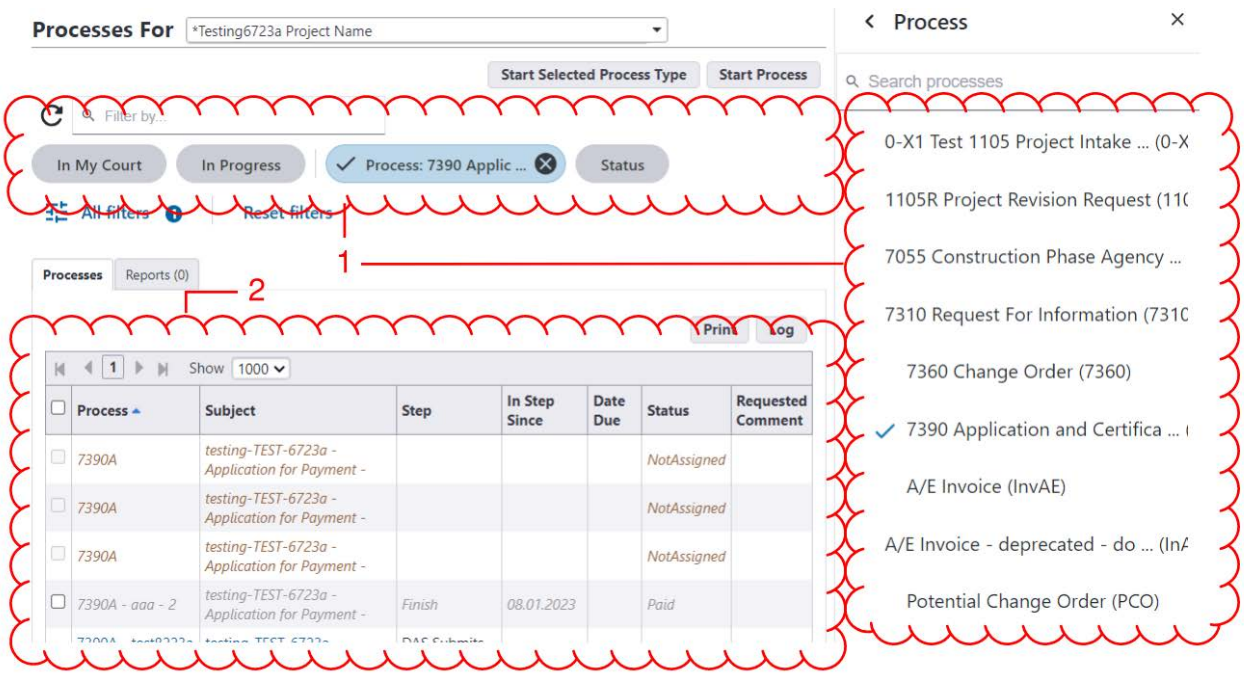
PART II:

PROCESSES

Section 7: Process Filter

“Filter Processes” can be found under the “Processes” tab in eBuilder. “Filter Processes” allows the user to locate and list certain process instances, including whether process instances are in the user’s court, the type of process, and the status and step of the process instance.

1. Change the Process filter settings to find the process instances you are looking for. For example, users may filter for process instances of a specific Type of Process. Selecting All Processes will show all instances, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list appears here. Click on the instance you wish to open. A pop-up will open. That is the process instance.



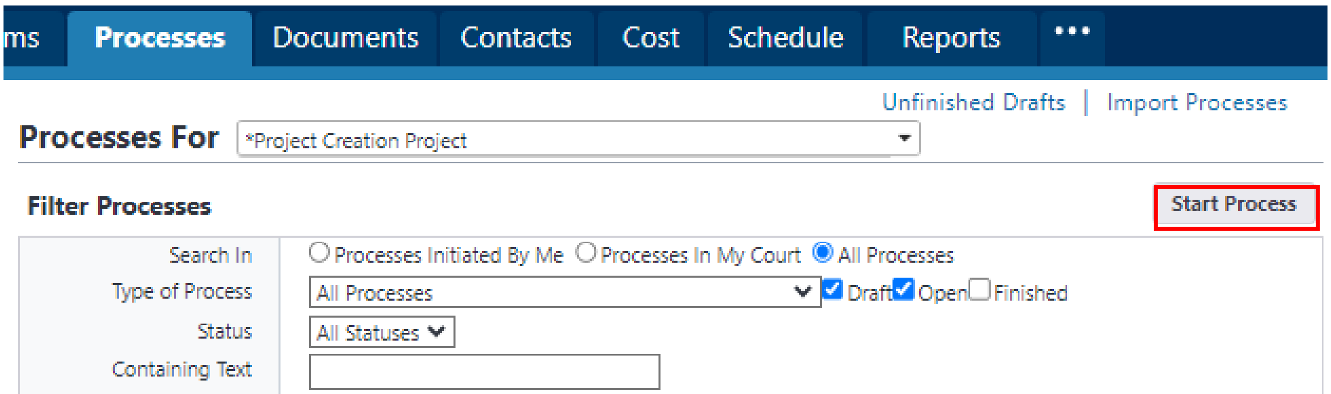
Section 8: 1105 Project Intake Request

8.01 Accessing the Process

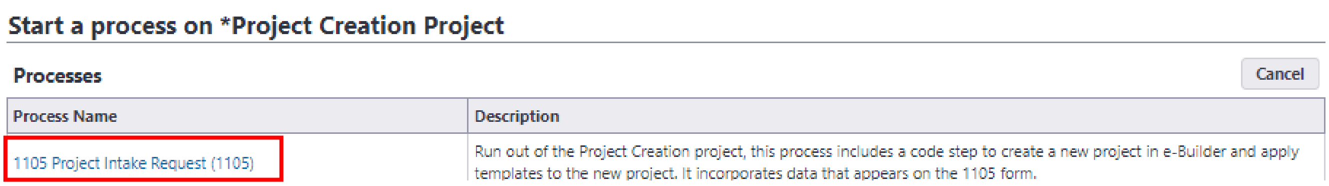
Log in to e-Builder. On your homepage, Go to the “Processes” tab and select the “*Project Creation Project” from the “All Projects” dropdown list.

8.02 Capital Project Initiation Submission (Process Initiator)

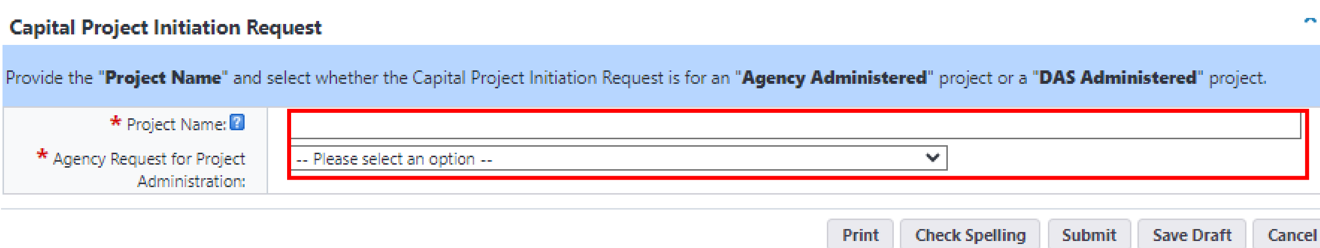
Click the “**Start Process**” button.



Click on the link entitled “**1105 Project Intake Request (1105)**”.



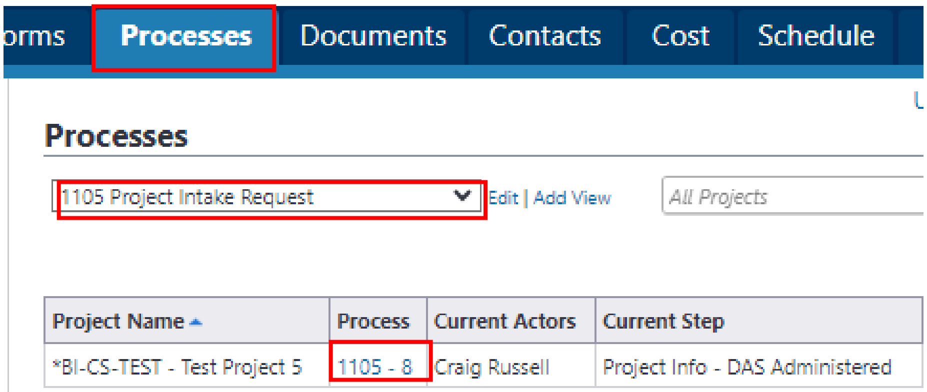
Provide the “Project Name” and select from the “Agency Request for Project Administration” dropdown list whether the project will be administered by “DAS/CS” or “Agency Administered”. Upon completion, click the “Submit” button to start the process.



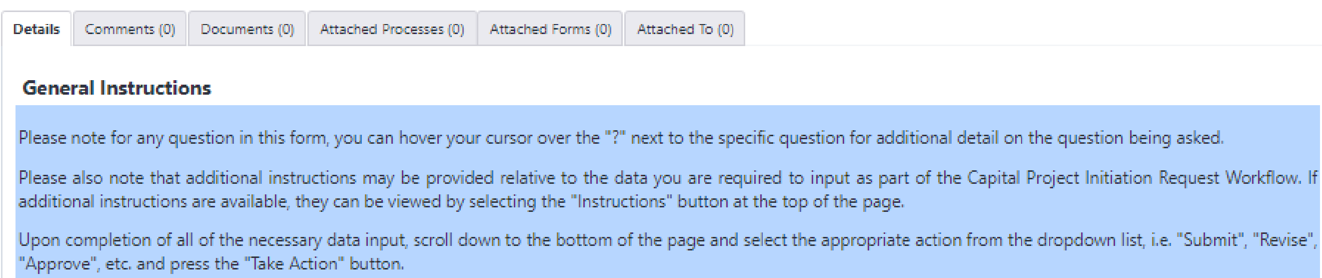
Depending upon how the project administration question was answered, the Process Initiator will be directed to fill out the required portion of Form 1105 – Capital Project Initiation Request.

To access the newly created Form 1105, click on the “Processes” tab again to reset the landing page.

Select “1105 Project Intake Request” from the view dropdown list, and click on the link in the “Process” column for the subject project.



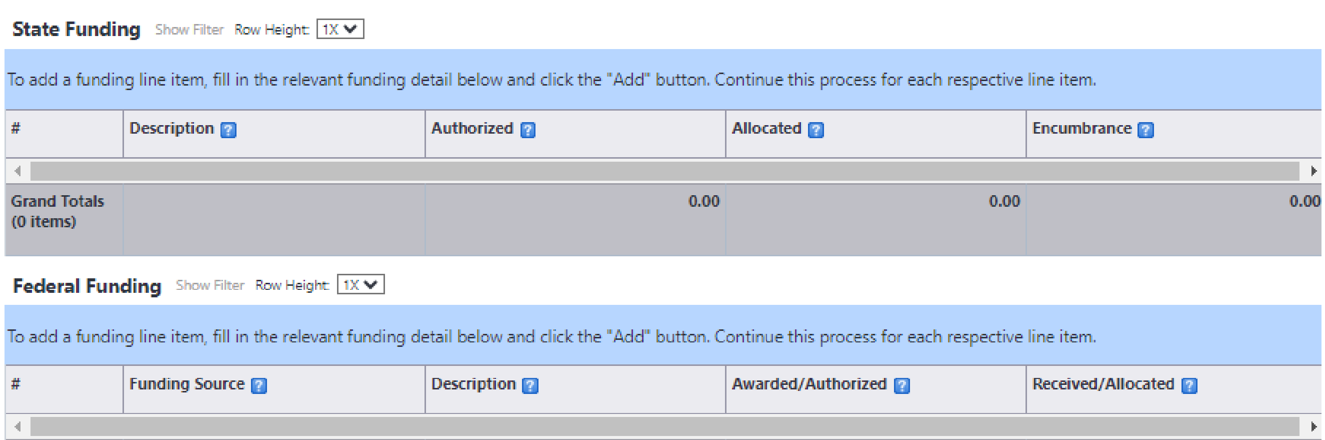
Review the “General Instructions” and complete Form 1105 in its entirety.



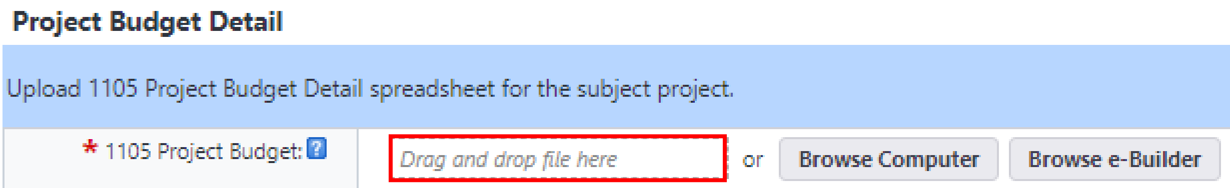
Helpful Hints for completing Form 1105

The “Agency PM” is to be selected from a dropdown list of Agency PM’s. If the Agency PM is not listed, please contact Craig Russell by email at craig.russell@ct.gov and request that the name be added.

State/Federal/Other Funding - When completing these sections, be sure to hover over the “?” next to the respective field for an explanation of what is to be provided in that field. For each line item, you will need to provide a “Description”, amount “Awarded/Authorized”, and amount “Received/Allocated”. For State Bond Funds, you will need to provide “Encumbrance”, the amount specifically authorized and/or allocated for the project with which the 1105 is being submitted, if the funding authorization is for more than one project. “Funding Source” will need to be provided if the source is not State Bond Funds. After filling in the required fields, click the “Add” button. This step will need to be repeated for each line item.

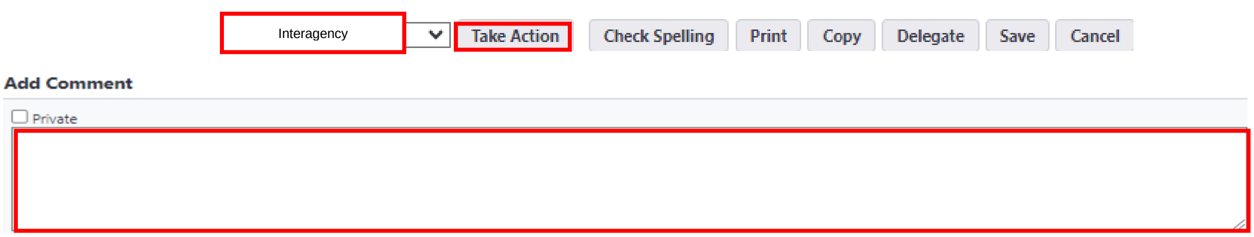


Project Budget Detail – The 1105 Project Budget Detail spreadsheet will need to be downloaded from the DAS/CS Portal and filled out separately from the eBuilder 1105 Project Intake Process. Upon completion, the project budget should be saved, dragged and dropped into the “1105 Project Budget” field.



Upon completion of the draft Form 1105, scroll down to the bottom of the page, read the instructions for the section entitled “Interagency Review”, and then select either “Interagency” or “Submit” from the dropdown list next to the “Take Action” button. “Interagency” would be selected if there are any individuals within your Agency that need to review or provide data input into the subject 1105 prior to submitting the 1105 to DAS/RECS. Otherwise select “Submit” and click the “Take Action” button.

After clicking “Take Action”, you will receive a prompt to provide a comment. If “Interagency” was selected, use the “Comment” section to provide the reviewer with direction to help them complete their review of the subject 1105 submission. If “Submit” was selected you have the option to provide a comment, but it is not required.



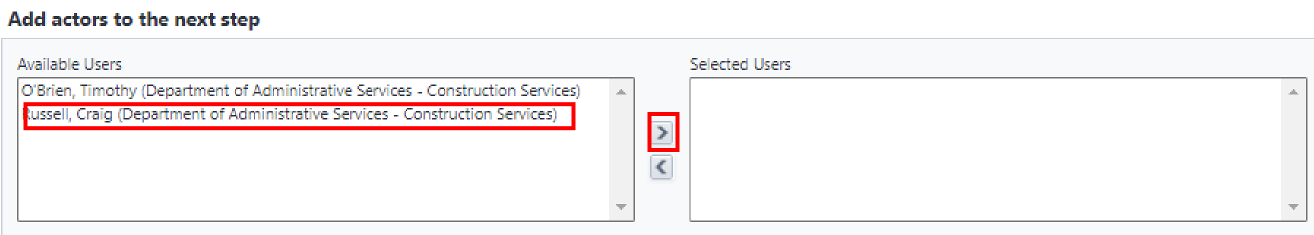
If you selected “Interagency”, you will also be required to either select an individual with an active eBuilder account from the list of “Available Users” to send the 1105 submission to for review, or input the email address of an outside user that does not have an account in eBuilder to allow them the ability to review and comment on the 1105 submission.

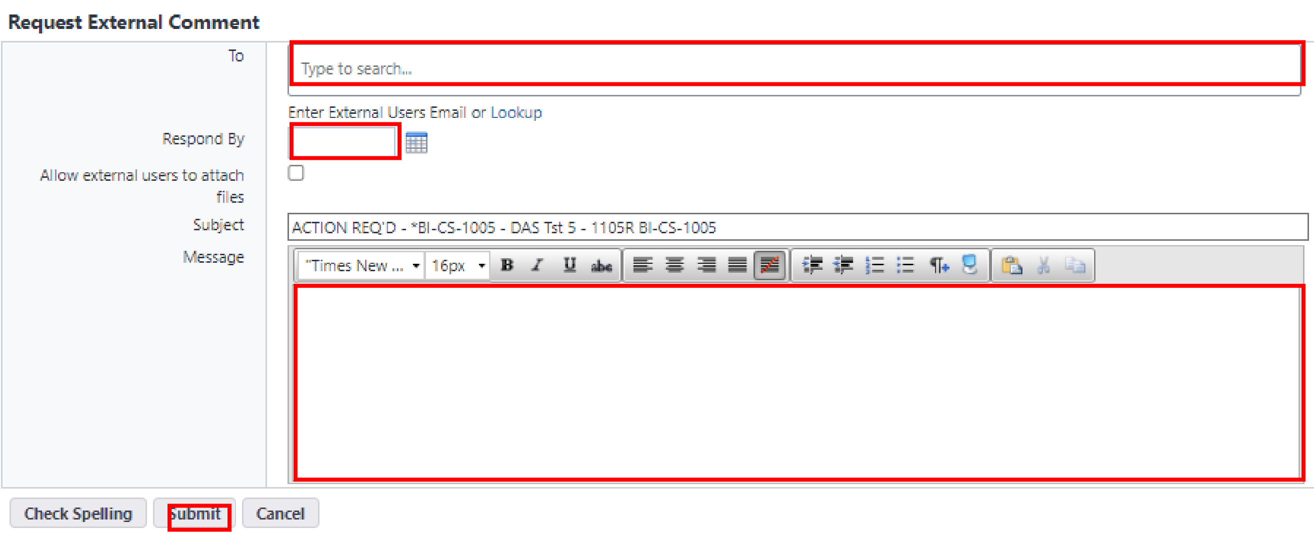
* Please note that only one (1) user at a time can be selected to review, comment, and if applicable, edit the revised submission. Repeat this process for each individual reviewer until all revisions are complete.
* Please also note that only those individuals with eBuilder accounts will have the ability to edit the draft 1105 submission in eBuilder. Individuals without eBuilder accounts will only have the ability to view the 1105 submission and provide comments, under the “Comments” tab, regarding the submission. Any proposed revisions recommended by the outside user would have to be input by the individual that initiated the 1105 process.

To add an actor to the next step in the process, find the name of the actor from the list of “Available Users”, click on their name to select the person, then click on the “>” to move that person into the “Selected Users” column.

To add an outside user, enter the outside users email address to the “To” field under “Request External Comment”. When entering the email address, the word “Add” will appear to the left of the email you are typing in. Click “Add” after you have entered the complete address.

Complete the remainder of the questions under the “Request External Comment” section. Upon completion, click the applicable button to proceed to the next step in the process, which will either be “Submit” (no interagency review) or “Interagency” (interagency review).



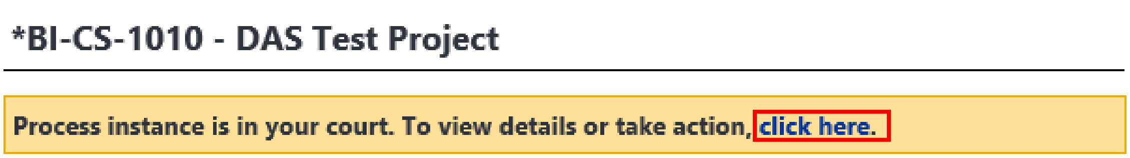


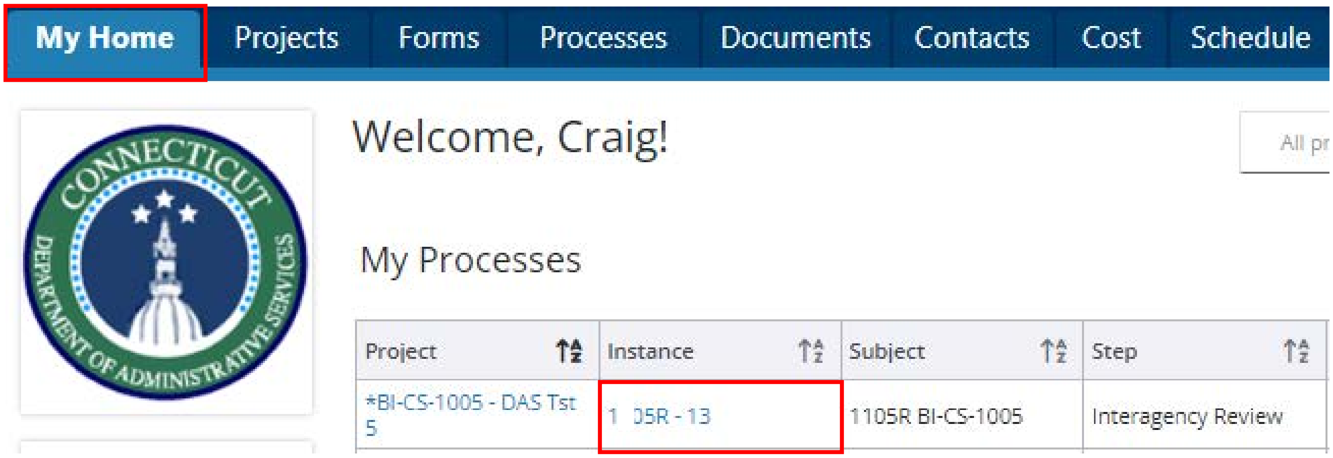
If there is an individual from your agency that should be granted access to Interagency Review and is not included in the list of actors, please contact Tim O’Brien by email at Timothy.O’Brien@ct.gov and request that the name be added.

8.03 Interagency Review (Interagency Reviewer)

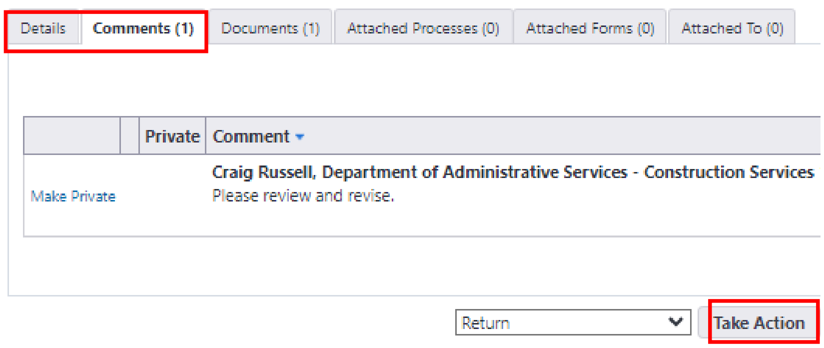
The Interagency Reviewer will receive an email from eBuilder as notification that the Capital Project Initiation Request is ready for them to review.

To access the Capital Project Initiation Request for revision, either click on the email link or log into eBuilder, if you have an active eBuilder account, select the “**My Home**” tab and **click on the “Instance” column link** for the subject project **under “My Processes”**.

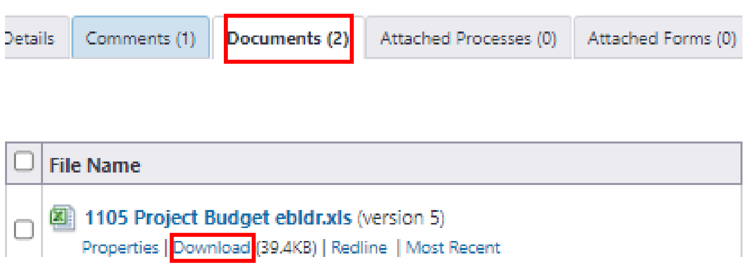




After opening the project instance, click on the "Comments" tab to review comments provided by previous actors and to get direction related to the 1105 review, return to the "Details" tab to review, and if applicable edit the submission.



If the 1105 Project Budget Detail requires revision, click the "Documents" tab, and then click the "Download" link beneath the project budget to download the project budget to an accessible file to upload back into eBuilder.



After completing edits to the project budget detail, save your changes, and then drag and drop the edited document back into the "Documents" tab in eBuilder. The latest version of the project budget edits will have the highest version number.

Upon completion of the review, scroll down to the bottom of the page and click "Take Action" to return the 1105 to the process initiator.

8.04 ADPM Assignment (CSS)

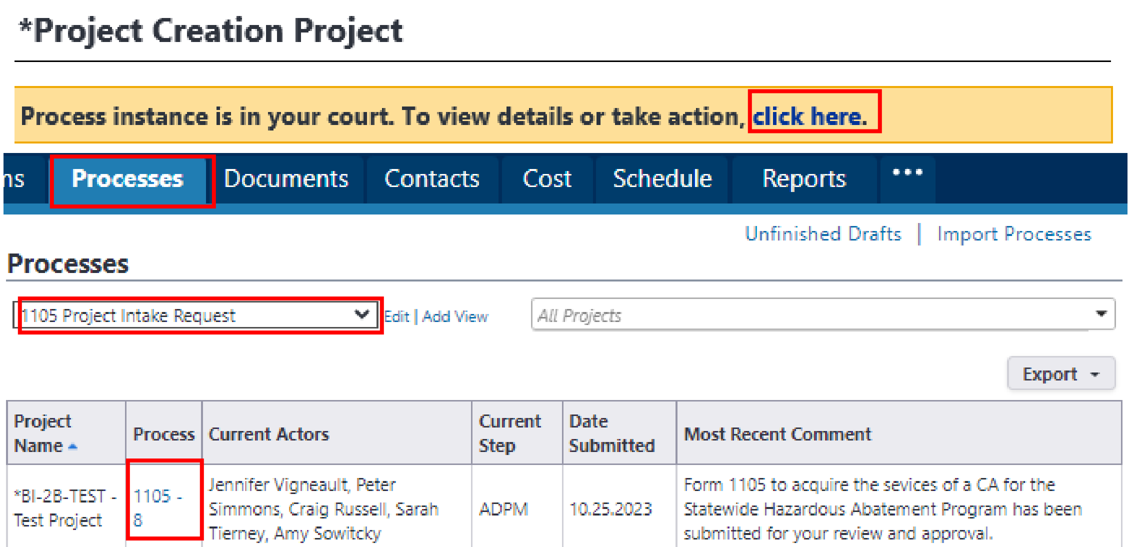
CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for ADPM Assignment.

After accessing the 1105 submission, CSS will scroll down to the bottom of the page and complete the Section entitled "Project Assignment". Upon completion, click "Submit". After clicking submit, a prompt will open for CSS to select the appropriate ADPM for review. Once selected, click "Submit".

8.05 Capital Project Initiation Request Review (ADPM)

The ADPM assigned to the Agency will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

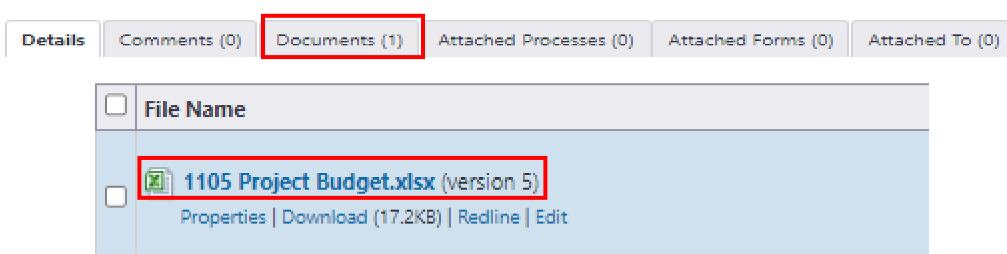
To access Form 1105 for review and approval, the ADPM can either click on the link provided in the email or log into eBuilder, click on the "**Processes**" tab, select the "**1105 Project Intake Request**" view from the dropdown list, and click on the link in the "**Process**" column for the subject project.



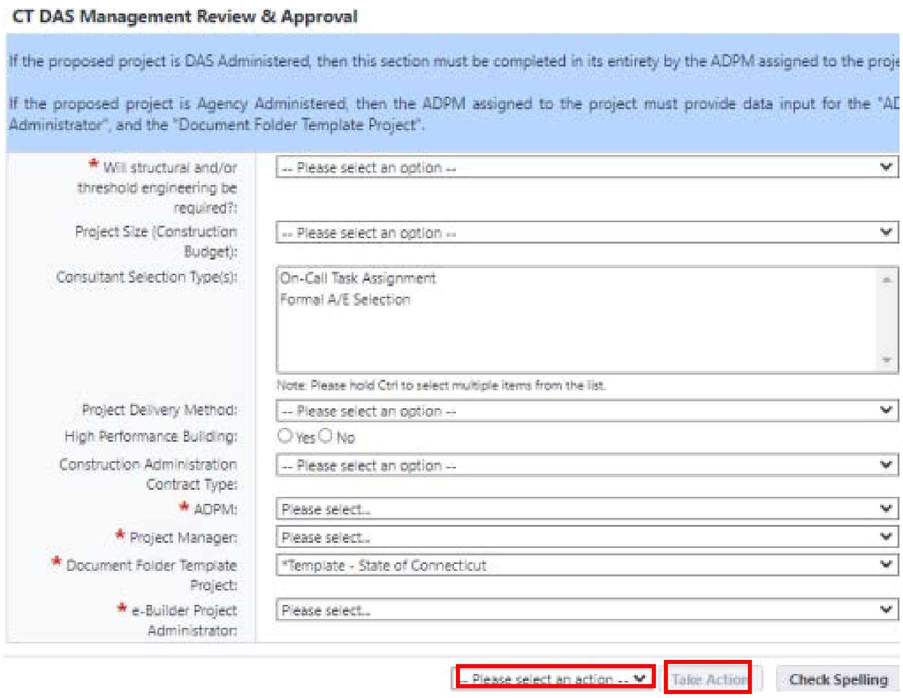
The ADPM can review the 1105 submission in its entirety under the "Details" tab.

To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, the ADPM can click on the "Comments" tab to review those comments.

To see the "1105 Project Budget Details", the ADPM can click on the "Documents" tab and then double click the "1105 Project Budget.xlsx" to open the budget for review.



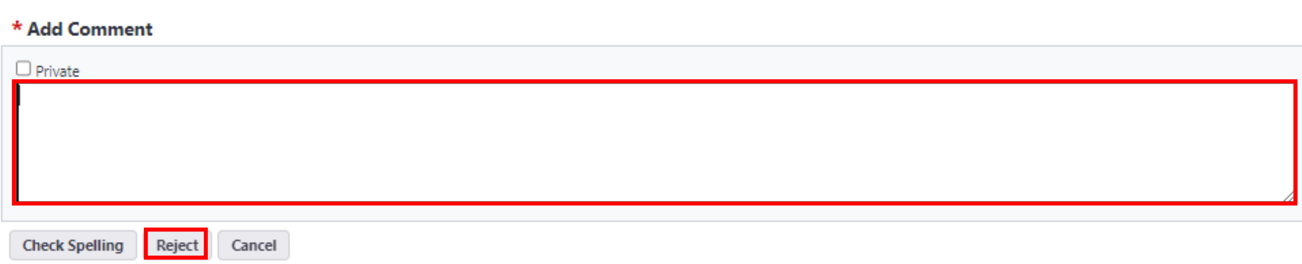
Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and complete the section entitled "CT DAS Management Review and Approval".



Then select one of the following from the dropdown list at the bottom of the page next to the "Take Action" button:

- "Revise" if the project requires the User Agency to revise the 1105 for resubmission.
- "Approve" if the content of the 1105 is approved and ready for the Agency Authorized Signatory and the Deputy Commissioner for review and approval.
    - * Note: If the ADPM answered the "Consultant "Selection Type(s)" question as "Formal A/E Selection", then the 1105 will automatically be forwarded to the Chief Architect for review prior to being forwarded to the Agency Authorized Signatory and the Deputy Commissioner for review and approval.

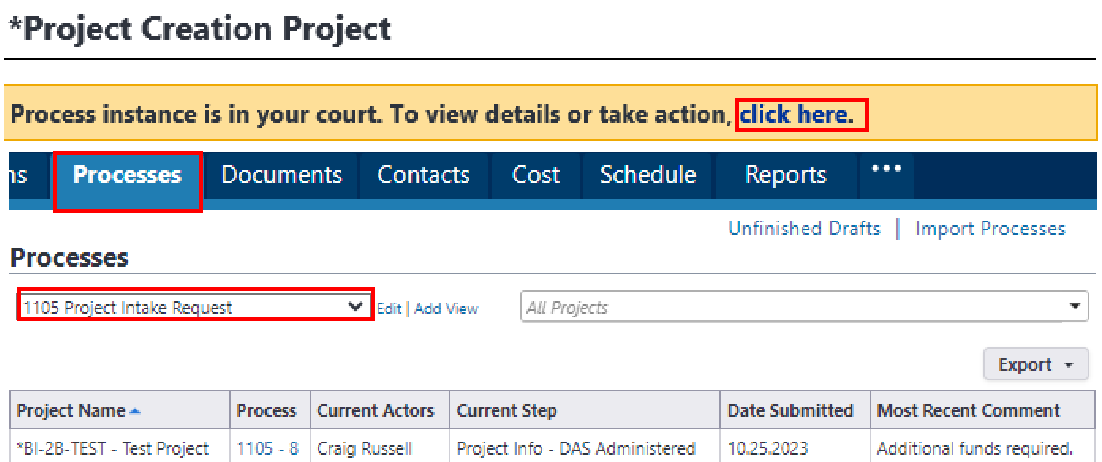
Once you have made your selection from the dropdown list, click the "Take Action" button. After selecting the "Take Action" button, a comment prompt will appear, where you can provide a reason for your selection, if applicable. After providing a comment click the appropriate button (Revise or Approve) to move the 1105 to the next step in the process.



8.06 Capital Project Initiation Request Revision (Process Initiator)

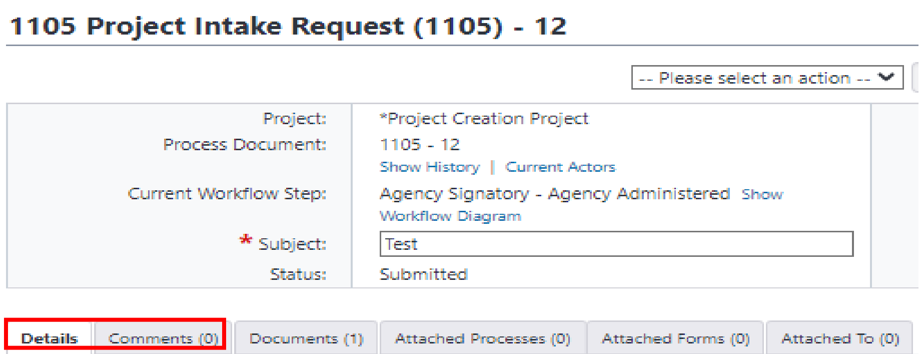
If the Capital Project Initiation Request requires revision, the Process Initiator will receive an email notification from eBuilder that the Capital Project Initiation Request has been returned for revision.

To access Form 1105 for review and revision, the Process Initiator can either click on the link provided in the email or log into eBuilder, click on the "Processes" tab, select the "1105 Project Intake Request" view from the dropdown list, and click on the link in the "Process" column for the subject project.

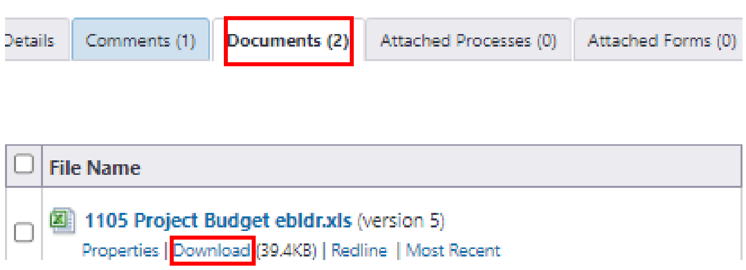


Click on the "Comments" tab to review any comments provided regarding the Capital Project Initiation Request submission.

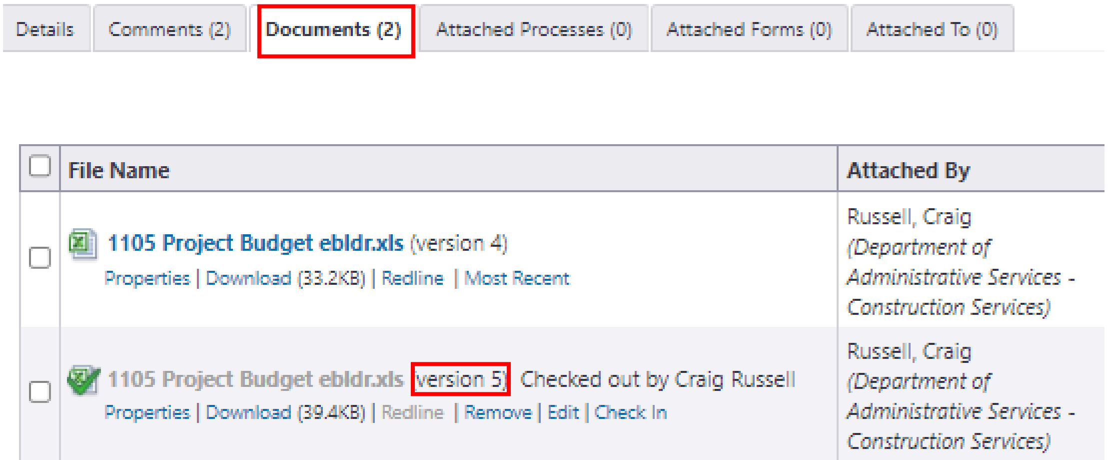
If the Capital Project Initiation Request itself requires revision, click on the "Details" tab and make the required revisions within the Capital Project Initiation Request for resubmission.



If the 1105 Project Budget Detail requires revision, click the "Documents" tab, and then click the "Download" link beneath the project budget to download the project budget to an accessible file to upload back into eBuilder.

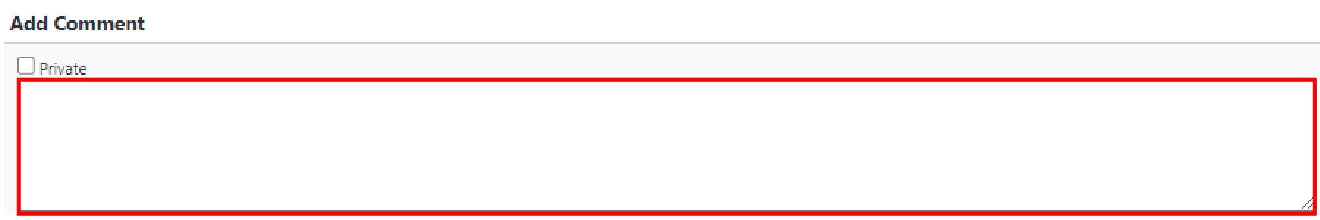


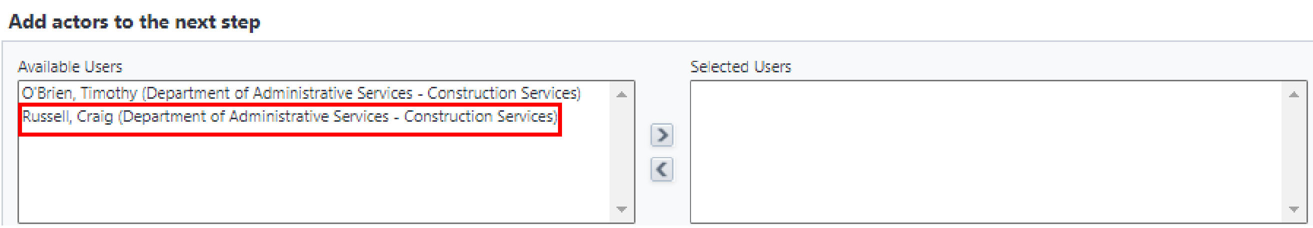
After completing edits to the project budget detail, save your changes, and then drag and drop the edited document back into the “Documents” tab in eBuilder. The latest version of the project budget edits will have the highest version number.



After all revisions have been made, scroll down to the bottom of the page, select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action” to send the revised 1105 back to DAS/CS for further review and processing.

After clicking the “Take Action” button, the Process Initiator will receive a prompt to provide a comment to the ADPM regarding the revisions made. After providing a comment, the Process Initiator should select Craig Russell from the list under “Add actors to the next step” and click the “>” to add him to the “Available Users” column and click “Submit”.



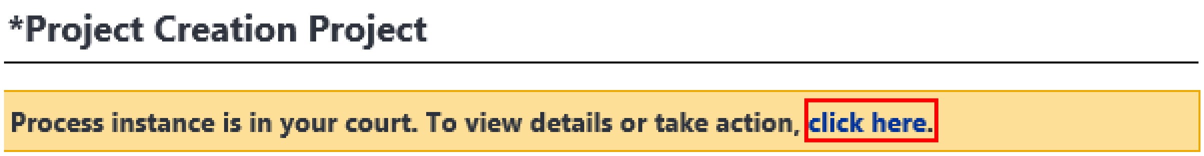


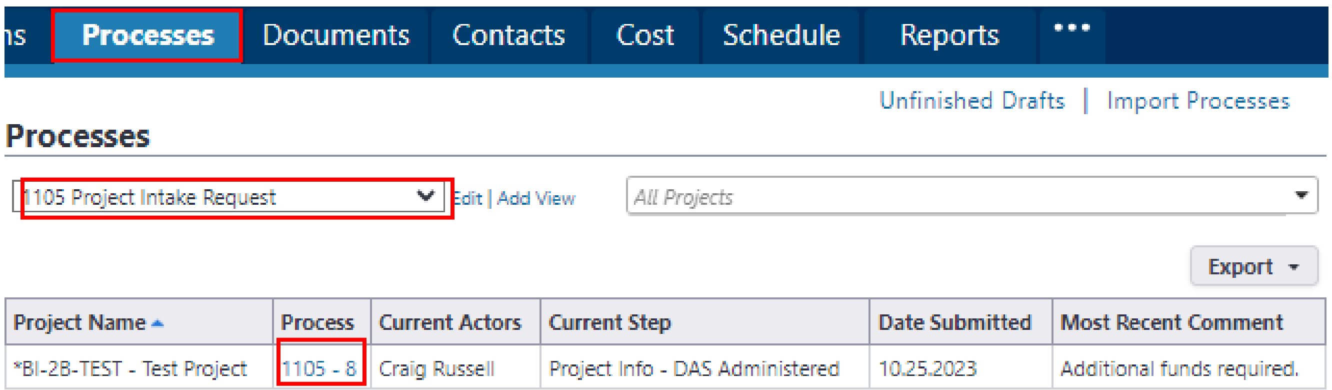
Repeat Steps 8.4 – 8.6 until such time that the ADPM approves the Capital Project Initiation Request submission.

8.07 Capital Project Initiation Request Review (Chief Architect)

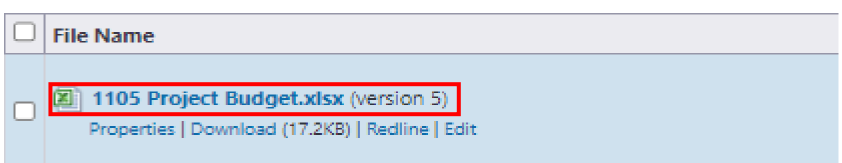
If the ADPM answered the “Consultant Selection Type(s)” question as “Formal A/E Selection”, then the Chief Architect will receive an email from eBuilder as notification that the Capital Project Initiation Request has been “Approved” by the ADPM and is ready for the Chief Architect to review.

To access Form 1105 for review and revision, the Process Initiator can either click on the link provided in the email or log into [eBuilder](), click on the "Processes" tab, select the "1105 Project Intake Request" view from the dropdown list, and click on the link in the "Process" column for the subject project.

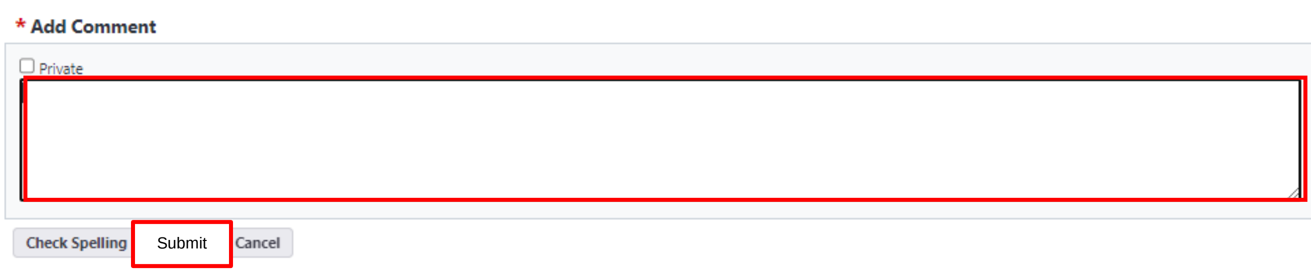




To review the 1105 submission in its entirety, click on the "Details" tab. To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, click on the "Comments" tab to review those comments. To see the "1105 Project Budget Details", click on the "Documents" tab and then double click the "1105 Project Budget.xlsx" to open the budget for review.



Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and either select "Return" from the dropdown list, next to the "Take Action" button, to return the submission to the ADPM, or select "Submit" to forward the submission for the selection of the Agency Authorized Signatory and then click "Take Action". After clicking the "Take Action", you will be prompted to provide a comment, where you can provide detail regarding your review of the 1105 submission. Once you have added a comment, click the applicable button - "Return" or "Submit" button.



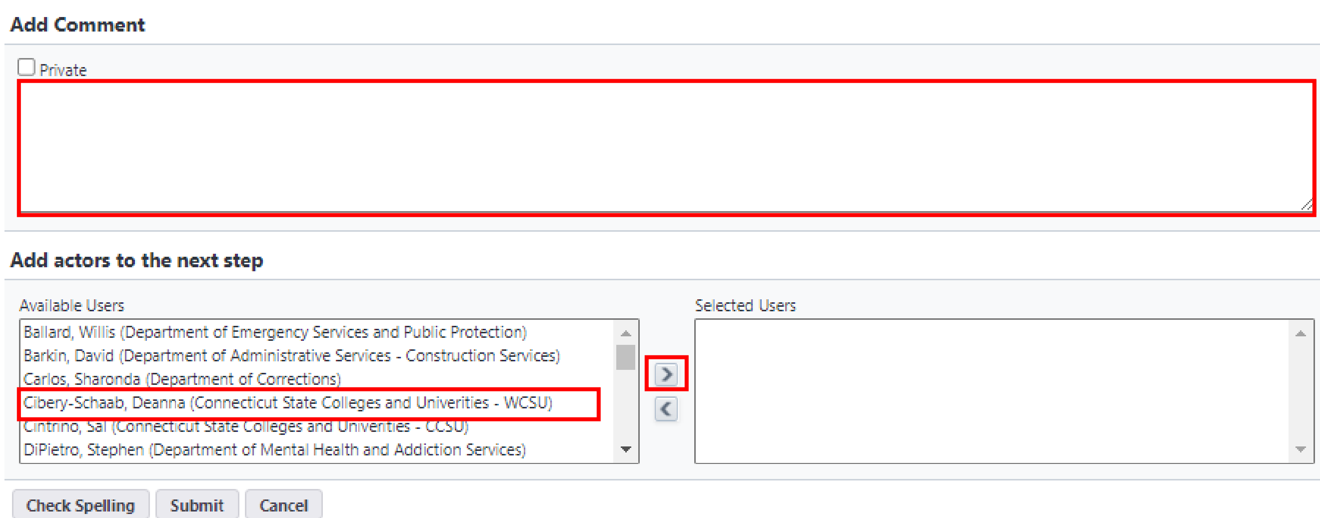
8.08 Authorized Signatory Selection (Process Initiator)

The Process Initiator will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access the Capital Project Initiation Request for revision, either click on the email link or log into eBuilder, select the “My Home” tab and click on the “Instance” column link for the subject project under “My Processes”.

After opening the link to the 1105 submission, scroll down to the bottom of the page and click the “Take Action” button.

After clicking the “Take Action” button, a prompt appear to add a comment, if applicable, for the Agency Authorized Signatory to review for sign off. After providing a comment, the Process Initiator should select their Agency Authorized Authority from the list of Authorized Signatories under “Add actors to the next step”. Click the “>” to add the signatory to the “Selected Users” column from the “Available Users” column and click “Submit” to send the revised 1105 to the Authorized Signatory for signature.

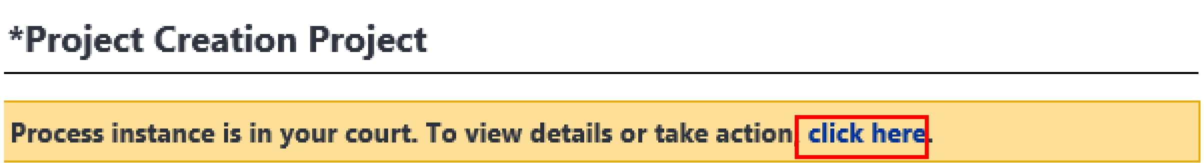


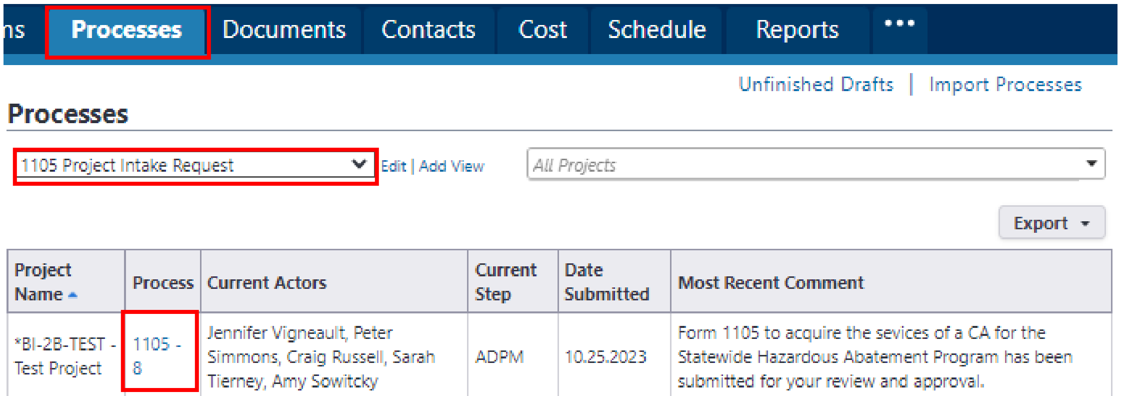
If your Agency Authorized Signatory is not listed, please contact please contact Tim O’Brien by email at Timothy.O’Brien@ct.gov and request that the name be added.

8.09 Capital Project Initiation Sign Off (Agency Authorized Signatory)

The Agency Authorized Signatory (AAS) will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, the AAS can either click on the link provided in the email or log into eBuilder, click on the “**Processes**” tab, select the “**1105 Project Intake Request**” view from the dropdown list, and click on the link in the “**Process**” column for the subject project.

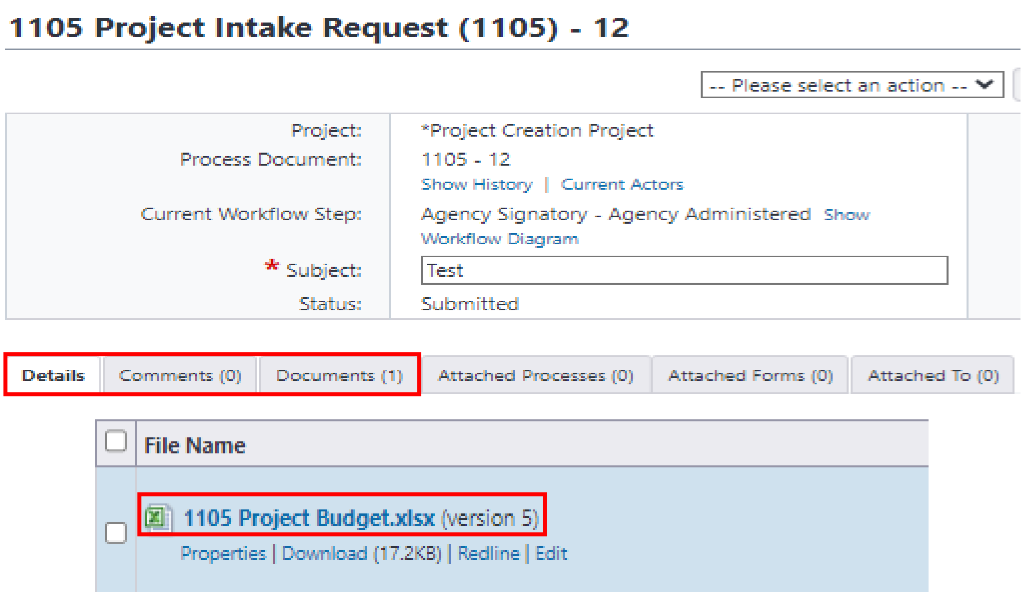




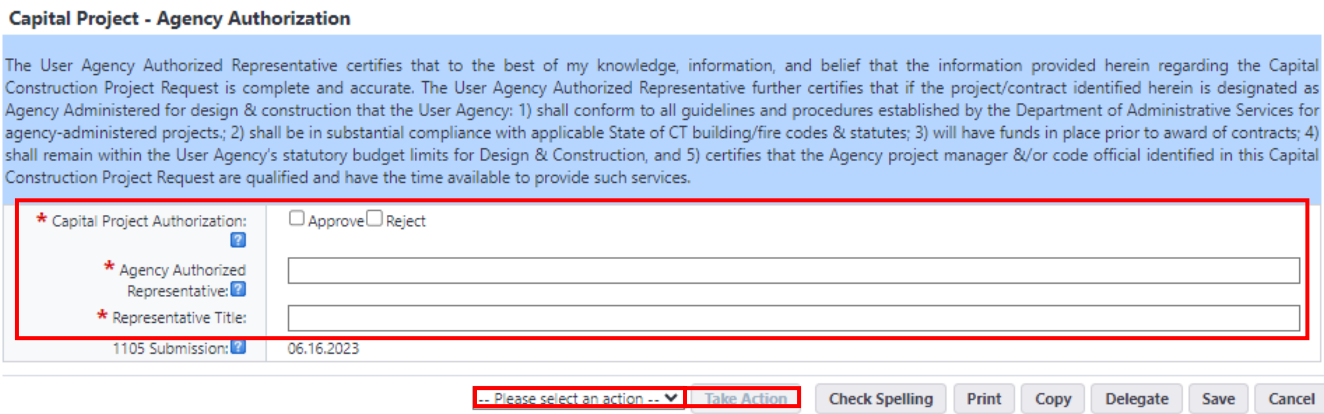
The AAS can review the 1105 submission in its entirety under the “Details” tab.

To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, the AAS can click on the “Comments” tab to review those comments.

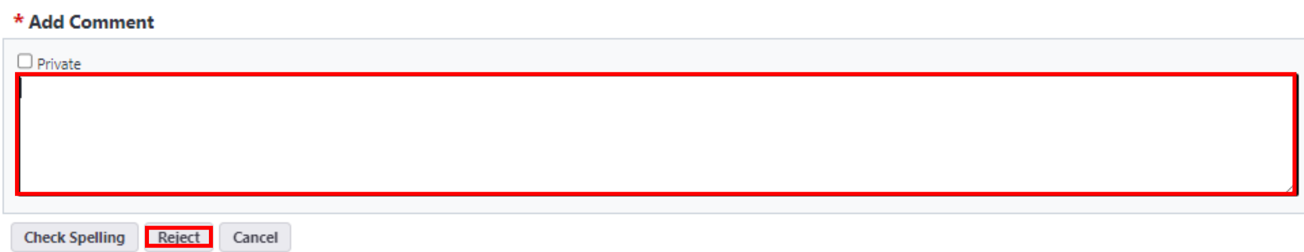
To see the “1105 Project Budget Details”, the AAS can click on the “Documents” tab and then double click the “1105 Project Budget.xlsx” to open the budget for review.



Upon completion of the Capital Project Initiation Request review, the AAS should return to the “Details” tab and scroll down to the bottom of the page to complete the section entitled “Capital Project – Agency Authorization”. The AAS will select either “Approve” or “Reject” the Capital Project Authorization, and provide his/her name and title as the Agency Authorized Authority. Upon completion, the AAS will either select “Approve” or “Reject” from the dropdown list next to the “Take Action” button and click “Take Action”.



- **If “Reject”** was selected, the AAS will be given a **prompt to provide a comment** to the Process Initiator regarding the reason for rejection and/or instructions for revision and resubmission. After providing a comment, click “**Reject**” to return the 1105 submission to the Process Initiator for revision and resubmission.



- If “Approve” was selected, the 1105 will be submitted to DAS/CS for submission to the DAS/CS Deputy Commissioner for review and approval.

8.10 Capital Project Initiation Request Review (CSS)

If the Agency Signatory chose “Approve”, CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

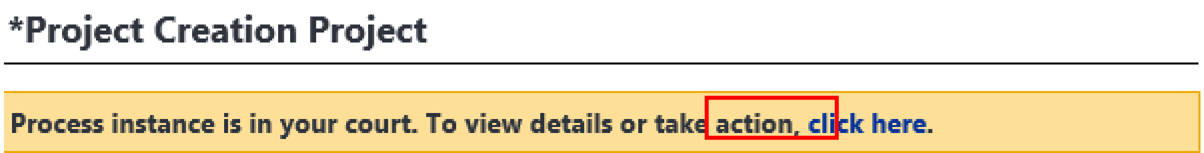
No additional review is necessary at this point. Scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action” to send the 1105 submission to the Deputy Commissioner for review and signature.

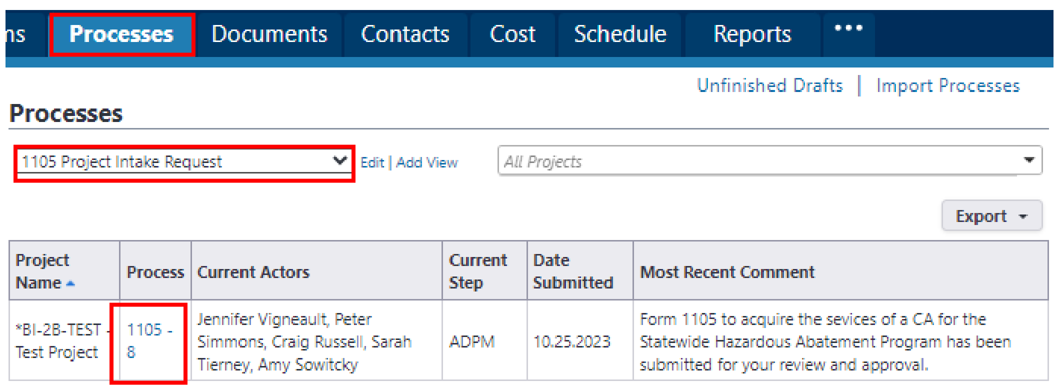
After clicking the “Take Action” button, you will receive a prompt to provide a comment to the Deputy Commissioner. Click on the instructions tab at the top of the page for draft language to include as part of the comment to the Deputy Commissioner. Click “Submit” to forward the 1105 to the Deputy Commissioner for signature.

8.11 Capital Project Initiation Request Review (DC)

The Deputy Commissioner (DC) will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, the DC can either click on the link provided in the email or log into eBuilder, click on the "**Processes**" tab, select the "**1105 Project Intake Request**" view from the dropdown list, and click on the link in the "**Process**" column for the subject project.

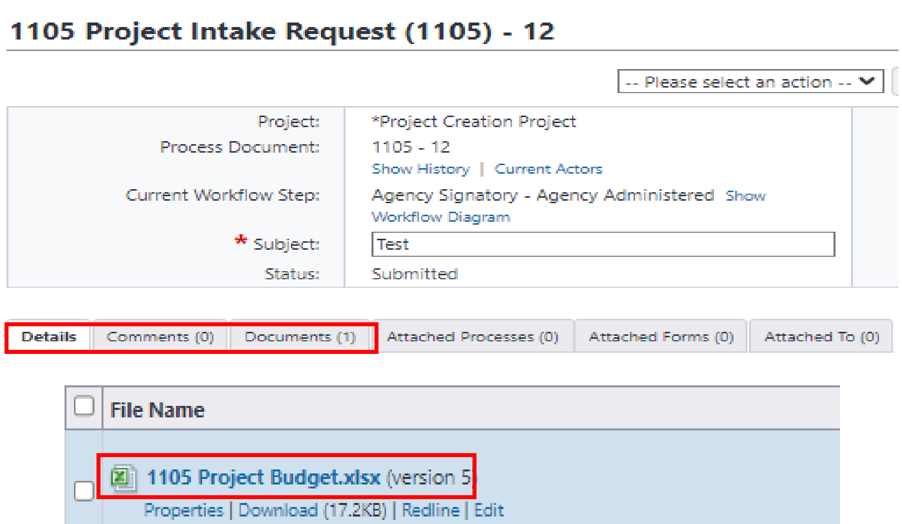




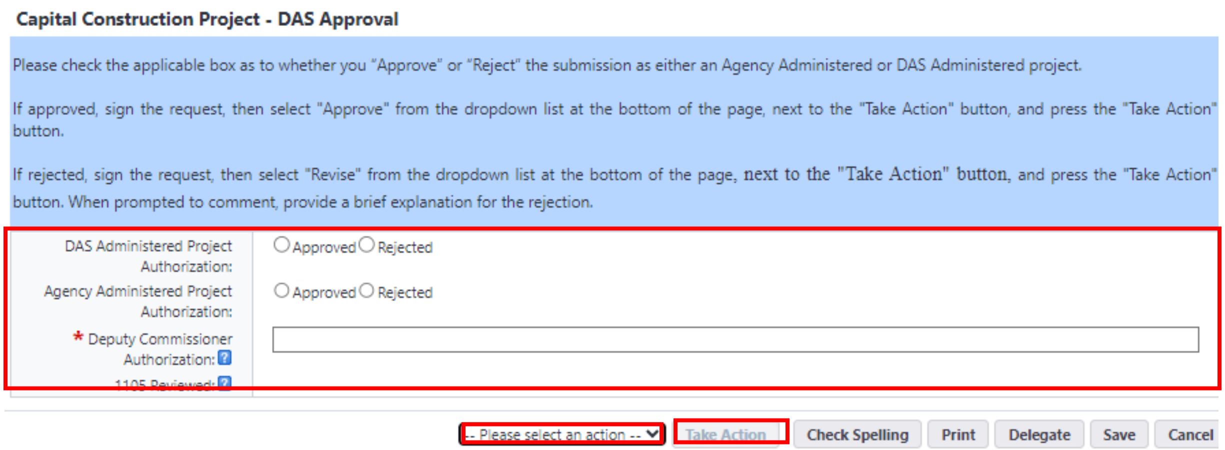
The DC can review the 1105 submission in its entirety under the "Details" tab.

To review comments provided by previous actors regarding the Capital Project Initiation Request submission, click on the "Comments" tab.

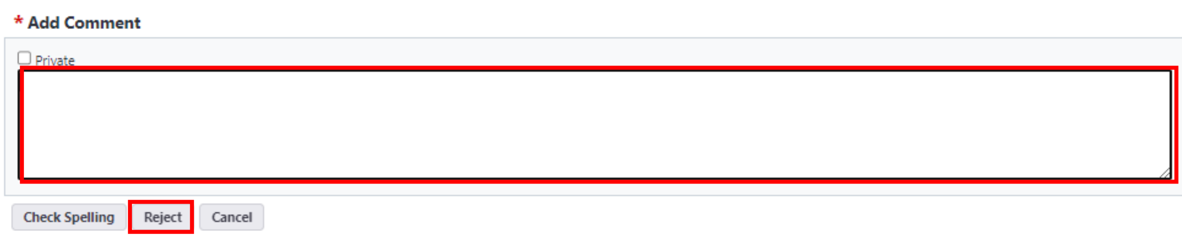
To see the "1105 Project Budget Details", the click on the "Documents" tab and then double click the "1105 Project Budget.xlsx" to open the budget to review.



Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and read the instructions for and complete the section entitled “Capital Construction Project – DAS Approval”, then select either “Approve” or “Reject” from the dropdown list at the bottom of the page next to the “Take Action” button and click “Take Action”.



- * If “Reject” was selected, you will receive a prompt to provide a comment to the ADPM to explain the reason for rejection and click “Reject” to return the submission to the ADPM. The ADPM will then contact the Client Agency to discuss proposed revisions.



8.12 Capital Project Initiation Request Project Number Assignment (CSS)

CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, CSS can either click on the link provided in the email or log into eBuilder, click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

CSS shall complete and submit Form 1115 – Capital Project Number Request to Financial Administrative Services (FAS) to assign a number to the project through normal means, outside of eBuilder.

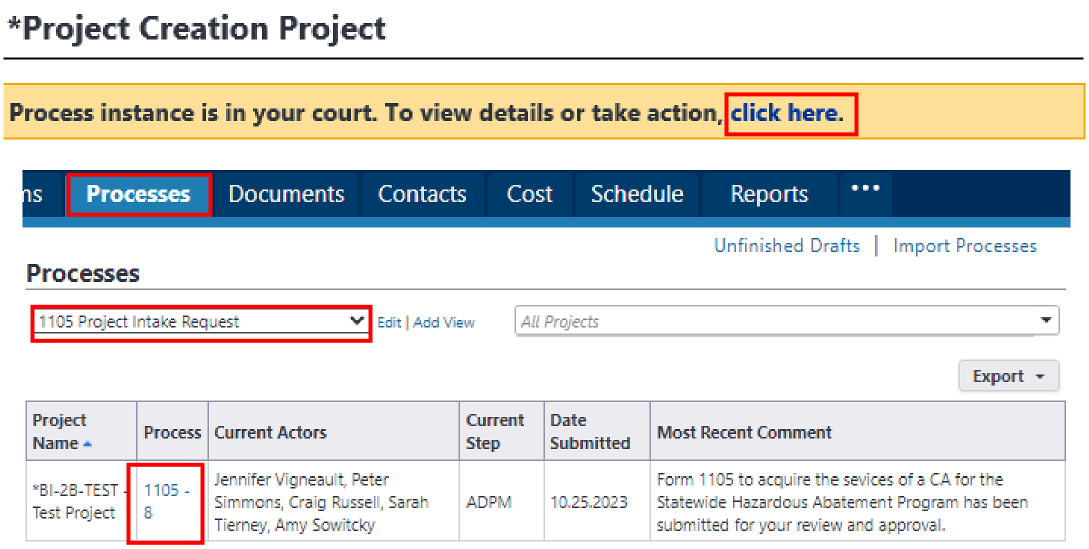
Upon receipt of the project number assignment, CSS will log back into eBuilder, select the “My Home” tab and click on the “Instance” column link for *Project Creation Project under “My Processes”.

CSS will complete the sections entitled “Project Number” and “Project Budget Detail” and upload a copy of the executed Form 1115 to the respective field in eBuilder. CSS will then scroll down to the bottom of the page, select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action”.

8.11 Capital Project Initiation Request CEPA Review (Environmental Services)

The Environmental Analyst (EA) will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

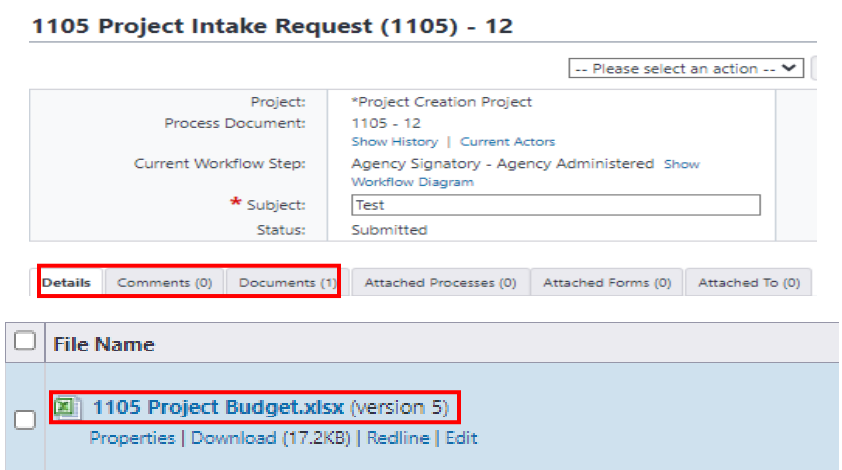
To access Form 1105 for review and approval, the EA can either click on the link provided in the email or log into eBuilder, click on the "**Processes**" tab, select the "**1105 Project Intake Request**" view from the dropdown list, and click on the link in the "**Process**" column for the subject project.



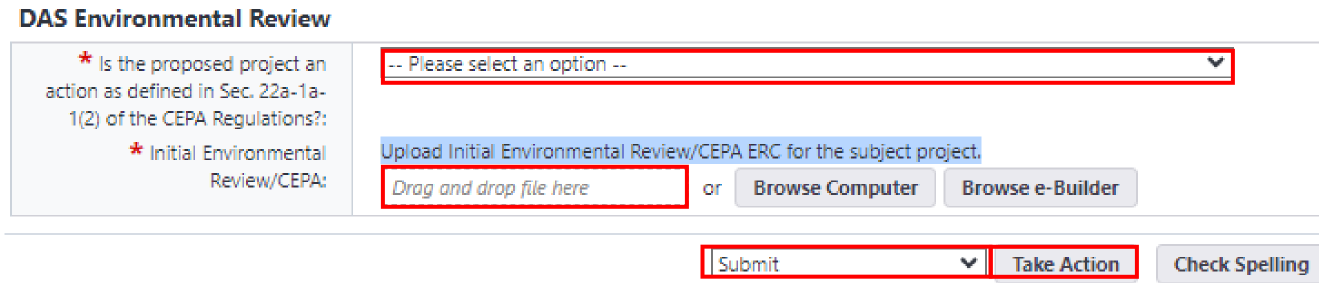
The EA can review the 1105 submission in its entirety under the "Details" tab.

To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, the EA can click on the "Comments" tab to review those comments.

To see the "1105 Project Budget Details", the EA can click on the "Documents" tab and then double click the "1105 Project Budget.xlsx" to open the budget for review.



Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and complete the section entitled “DAS Environment Review” and upload a copy of the Initial Environmental Review to the respective field in eBuilder. Upon completion, select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action”.



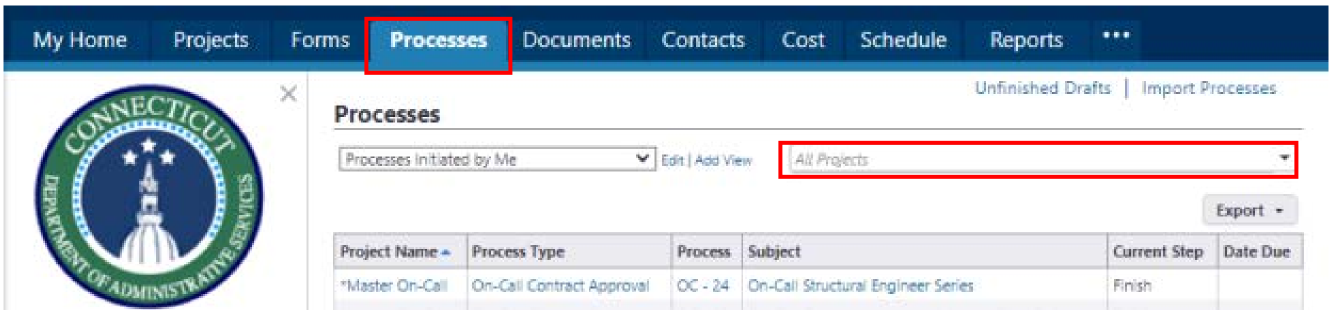
The 1105 Project Intake Process is now complete. A copy of the executed Form 1105 will be distributed, via email through eBuilder, to all process participants and to the subject project file folder.

Section 9: 1105R Project Revision Request

9.01 Accessing the Process

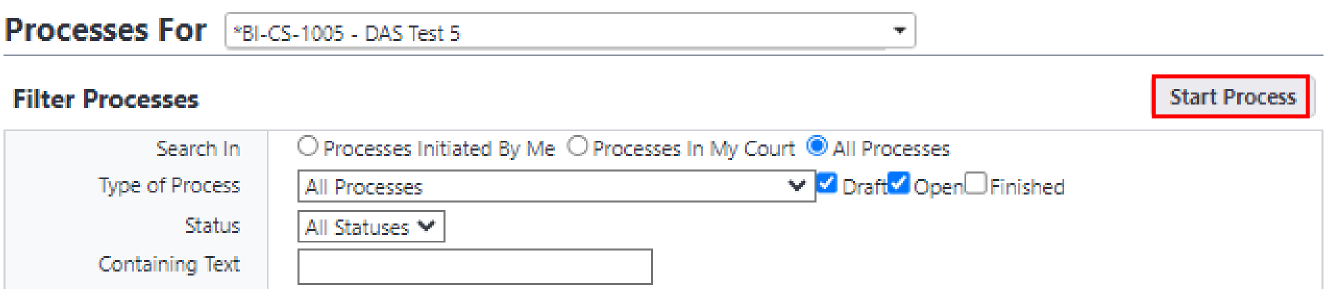
Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f

On your homepage, Go to the “Processes” tab and select the subject project for which you wish to submit a revised 1105 from the “All Projects” dropdown list.

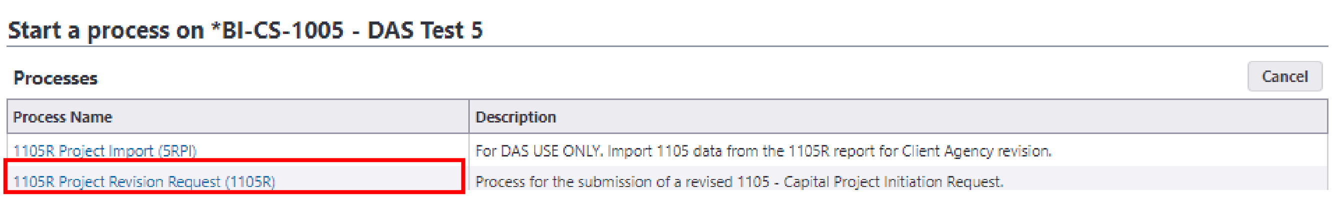


9.02 Project Revision Request Submission (Process Initiator)

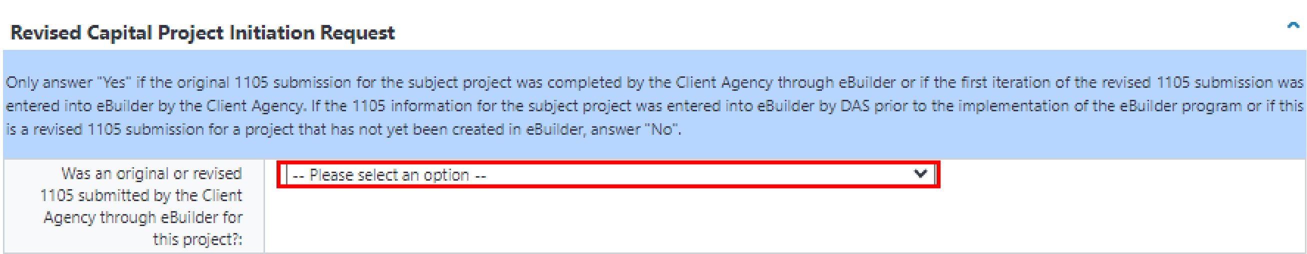
Click the “Start Process” button.



Click on the “1105R Project Revision Request” link to start the process.



Answer the question under the header “Revised Capital Project Initiation Request”.



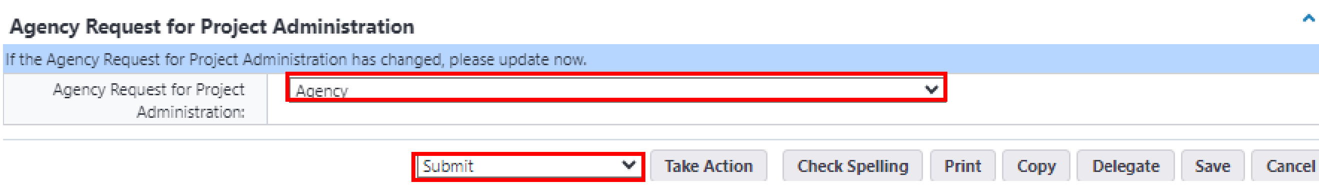
Only answer "Yes" if the original 1105 submission for the subject project was completed by the Client Agency through eBuilder or if the first iteration of the revised 1105 submission was entered into

eBuilder by the Client Agency using this process. This will notify DAS of the request, at which time DAS will import the original submission back into eBuilder and send it back to the Process Initiator for revision.

If the 1105 information for the subject project was not entered into eBuilder by the Client Agency, answer "No".

* Please note that if future revisions are required to this 1105 submission, the Client Agency can answer “Yes” to having the first iteration of the revised 1105 submission as being entered into eBuilder and DAS can import that submission back into eBuilder for the Client Agency to edit.

Answer the question under the header “Agency Request for Project Administration” and click the “Take Action button.



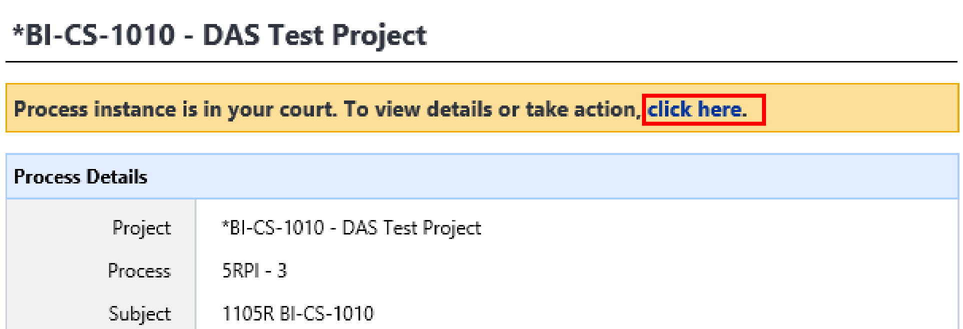
If the Agency answered “Yes” to the “Was an original or revised 1105 submitted by the Client Agency for this project,” the submission will be forwarded to Construction Support Services to initiate the “1105R Project Import Process”, at which time the original or revised 1105 that was entered into eBuilder will be imported back into eBuilder and forwarded to the Agency for revision and submission.

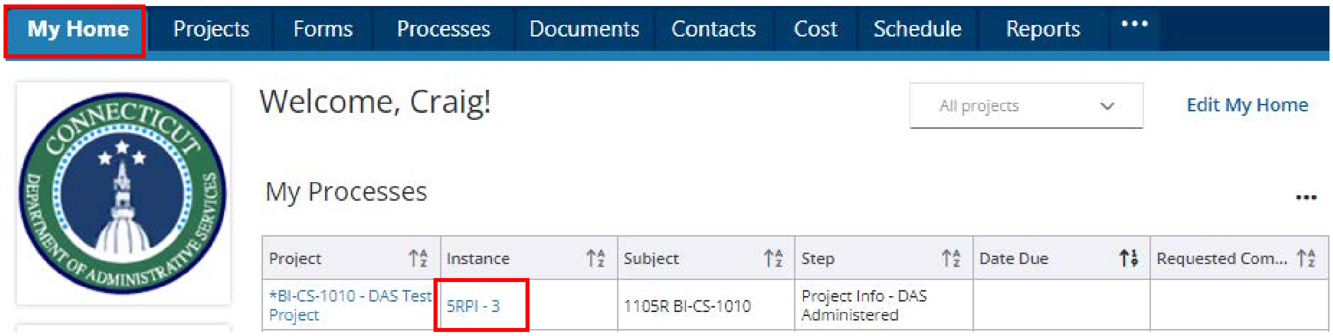
If the Agency answered “No” to the question, the request will be forwarded to the Process Initiator to complete the revised Capital Project Initiation Request.

9.03 Complete Revised Capital Project Initiation Request (Process Initiator)

The Process Initiator will receive an email from eBuilder as notification that the Capital Project Initiation Request is ready for them to prepare the revised 1105 for submission in eBuilder.

To access the Capital Project Initiation Request for revision, either click on the email link or log into eBuilder, select the “My Home” tab and click on the “Instance” column link for the subject project under “My Processes”.

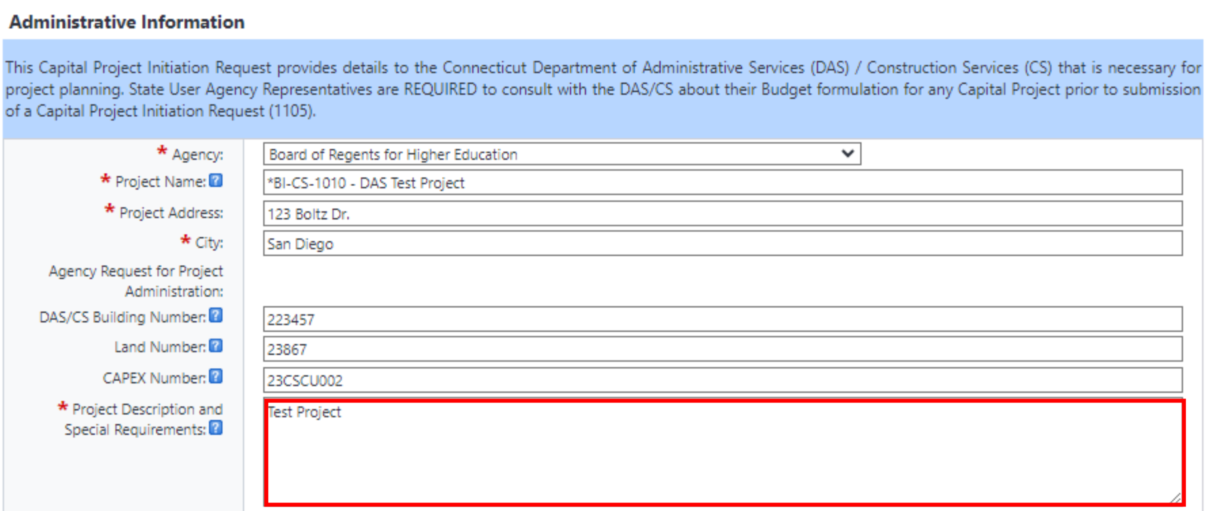




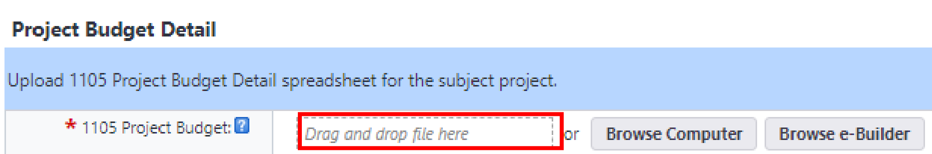
If the Client Agency answered "No" to the question "Was an original or revised 1105 submitted by the Client Agency through eBuilder", then either no data will be imported (the project does not exist in eBuilder), or if DAS/CS entered the data for the subject project into eBuilder prior to the release of the program to the Client Agency, then some data will be transferred into the revised 1105 submission, but that data will be primarily limited to Administrative information. The Client Agency will be responsible for completing the balance of the revised 1105 submission. To complete the revised 1105 submission, the Client Agency will follow the directions provided under "Section 8: 1105 Project Intake Request, Line 8.2 – Capital Project Initiation Submission" of this document, and scroll down to "Helpful Hints for completing 1105" to begin the process for completing the revised 1105.

If the Client Agency answered "Yes" to the question "Was an original or revised 1105 submitted by the Client Agency through eBuilder", then the data import should be comprehensive. The Client Agency should review the data imported and revise the 1105 accordingly. At minimum, the Client Agency will be required to provide data input for the following fields and sections:

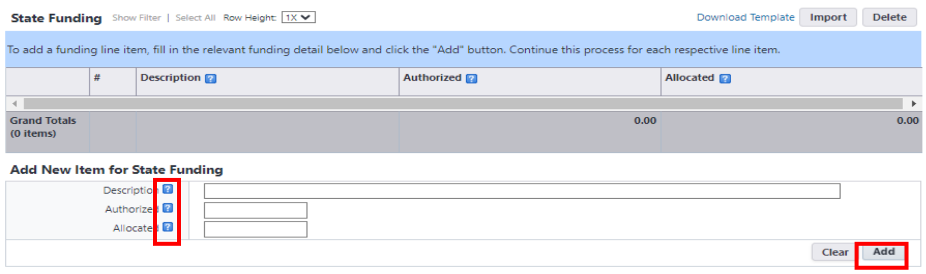
a. Within the **"Administrative Information"** section, revise the **"Project Description and Special Requirements"** field, if applicable.



b. Within the "Budget Details" section, upload a revised "1105 Project Budget"; and

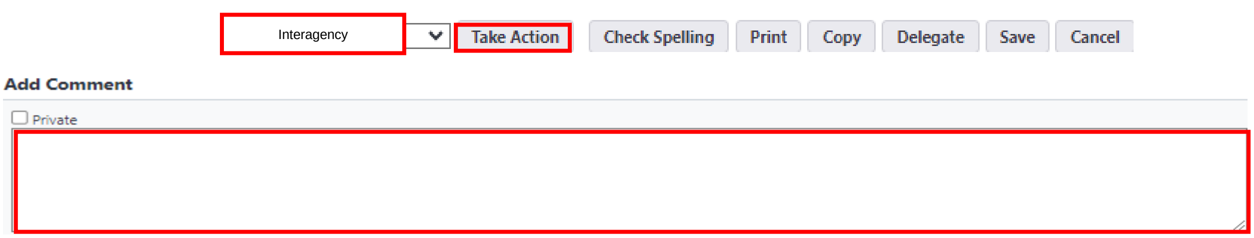


c. Complete the Financial Information section. Be sure to hover over the "?" next to the respective field for an explanation of what information is to be provided. For each line item, you will need to provide a "Description", amount "Awarded/Authorized", and amount "Received/Allocated". For State Bond Funds, you will need to provide "Encumbrance", the amount specifically authorized and/or allocated for the project with which the 1105 is being submitted, if the funding authorization is for more than one project. "Funding Source" will need to be provided if the source is not State Bond Funds. After filling in the required fields, click the "Add" button. This step will need to be repeated for each line item.



Upon completion of the draft Form 1105R, scroll down to the bottom of the page, read the instructions for the section entitled "Interagency Review", and then select either "Interagency" or "Submit" from the dropdown list next to the "Take Action" button. Select "Interagency" if there are any individuals within your Agency that need to review or provide data input into the subject 1105 prior to submitting the 1105 to DAS/RECS; otherwise select "Submit" and click "Take Action".

After selecting your option, you will receive a prompt to provide a comment for the next individual in the process slated to review the 1105 submission. If "Interagency" was selected, provide the reviewer with the required direction to help them complete their review in the comment section. If "Submit" was selected you have the option to provide a comment, but it is not required.

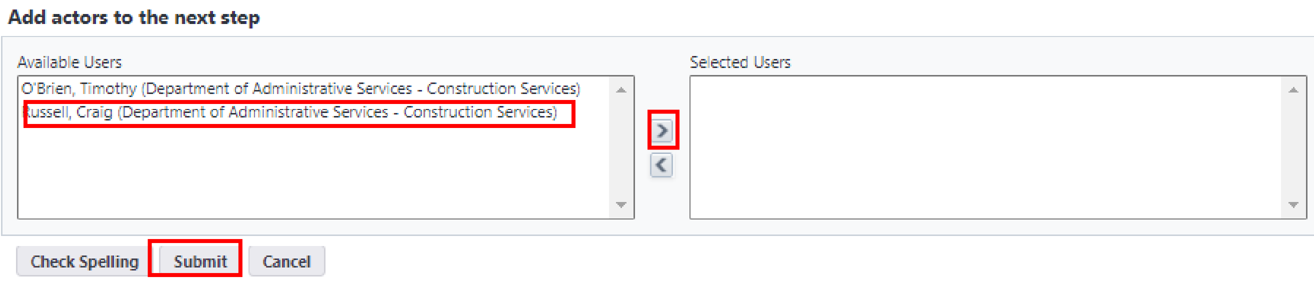


If you selected "Interagency", you will also be required to either select an individual with an active eBuilder account from the list of "Available Users" to send the 1105 submission to for review.

* Please note that only one (1) user at a time can be selected to review, comment, and if applicable, edit the revised submission. Repeat this process for each individual reviewer until all revisions are complete.

To add an actor to the next step in the process, find the name of the actor from the list of "Available Users", click on their name to select the person, then click on the ">" to move that person into the "Selected Users" column.

Upon completion, click the applicable button to proceed to the next step in the process, which will either be "Submit" (no interagency review) or "Interagency" (interagency review).



If there is an individual from your agency that should be granted access to Interagency Review and is not included in the list of actors, please contact Tim O'Brien by email at Timothy.O'Brien@ct.gov and request that the name be added.

9.04 Other Reviewers (Interagency/Outside Reviewer)

The balance of the "1105R Project Revision Request" process will be completed in the same format as the "1105 Project Intake Request" process, including Steps 8.03 – 8.11, and 8.13.

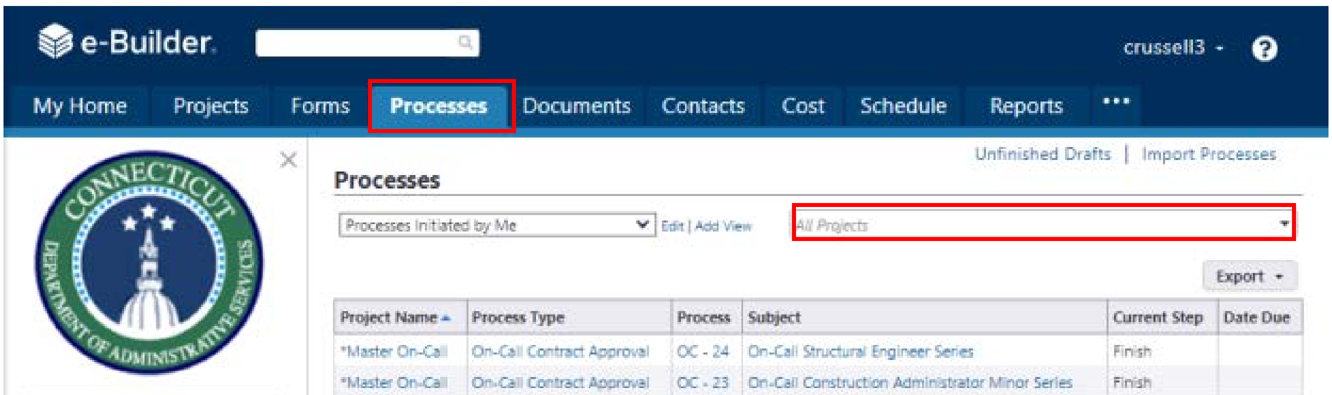
- Please note that process instances in the 1105 process begin with "1105" and process instances for the 1105R process begin with "1105R".

Section 10: 1135 Task Letter

10.01 Accessing the Process

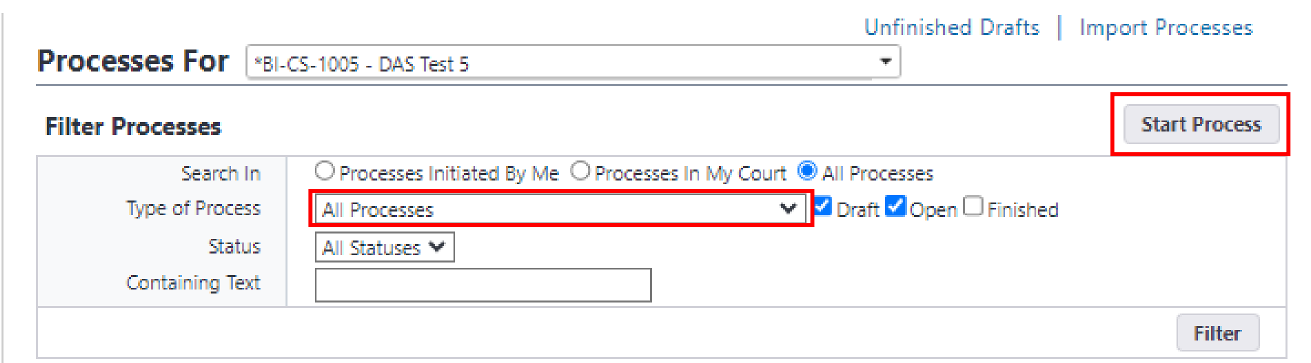
Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f

On your homepage, Go to the “Processes” tab and select the project for which you want to submit Form 1135 from the dropdown list.

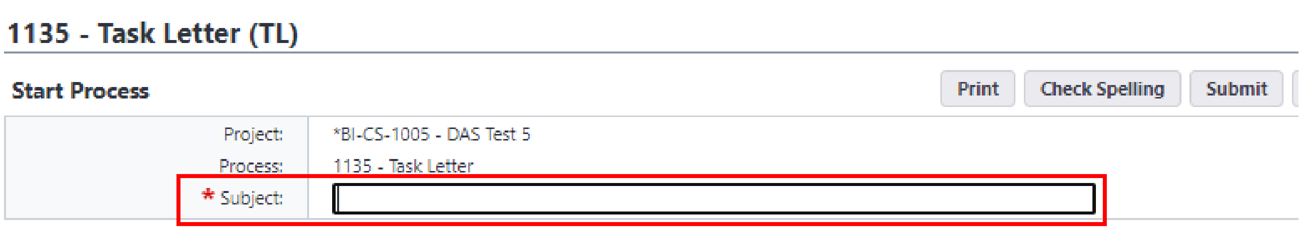


10.02 On-Call Request (PM if DAS Administered or Supplemental Task; CSS if AA)

Select 1135 – Task Letter from the “All Processes” dropdown list and click “Start Process”.



In the subject field at the top of the page input “**Project Number - On-Call (On-Call Contract Type – ARC, CA, etc.) Request**”, i.e. BI-2B-472 – On-Call Architect Request.



Below the subject are directions with a link to create a project task letter file folder within:

- The On-Call Checklist Review file folder (if the cumulative total of all task letters for a consultant is less than $100,000, or in the case of CSCU or the Judicial Branch the cumulative total of all task letters is less than $300,000) for DAS Administered Projects (PM); or
- The AA Projects – DAS.CS.PM file folder (if the cumulative total of all task letters for a consultant is less than $100,000, or in the case of CSCU or the Judicial Branch the cumulative total of all task letters is less than $300,000) for AA Projects (CSS); or
- The SPRB Contract Approval file folder (if the cumulative total of all task letters for a consultant is greater than or equal to $100,000, or in the case of CSCU or the Judicial Branch, the cumulative total is greater than or equal to $300,000) for DAS Administered Projects (PM) or Agency Administered Projects (CSS).

On-Call Consultant Selection Request:

In the "Subject" line above, input the Project Number followed by the name of the type of On-Call Service being requested, i.e. "BI-2B-472 - On-Call Architect Request".

DAS Administered Projects:

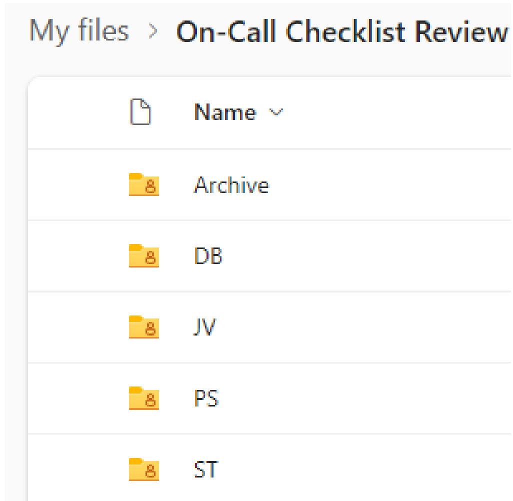
1. If the subject project is Administered by DAS and the cumulative total of all task letters with a consultant for the same project is less than $100,000, the DAS PM assigned to the project shall create a new file folder in your ADPM's "On-Call Checklist Review" file folder on the OneDrive with the following naming protocol – **Project # - Project Name.**
2. If the subject project is Administered by DAS and the cumulative total of all task letters with a consultant for the same project is greater than or equal to $100,000, the DAS PM assigned to the project shall create a new file folder in your ADPM's "SPRB Contract Approval" file folder on the OneDrive with the following naming protocol – **Project # - Project Name.**
3. The DAS PM shall then prepare an On-Call Selection Request, Form 1135, to initiate selection process, upload the draft Form 1135 (in Word format), along with a copy of the completed Form 1105 (signed by DC), and a copy of the corresponding 1105 project budget details to the subject file folder.
4. After both Form 1105, the corresponding 1105 project budget details, and Form 1135 have been uploaded to the subject file folder, copy the link to the subject file folder and paste the link in the On-Call Selection Request Field below. To create a copy of the file folder link, proceed as follows:
   a. Either right click on the subject file folder on the OneDrive on your computer and select "View online" from the dropdown list, or
   b. Click on the On-Call Checklist Review link, open your ADPM's file folder, and scroll down the list to find the file folder you created;
   c. Hover over the subject file folder from the online OneDrive and click on the ellipsis;
   d. Click on "Copy link";
   e. Paste the link in the On-Call Selection Request field below.

Agency Administered Projects:

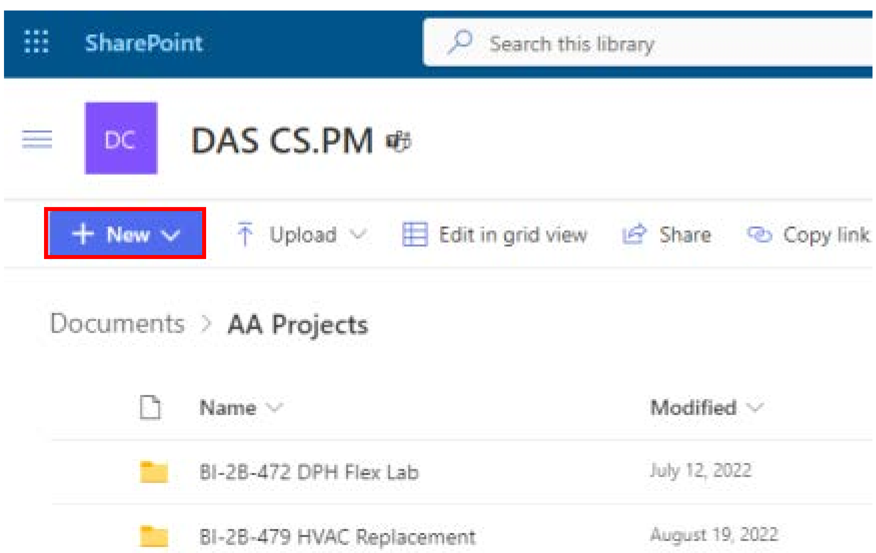
1. If the subject project is Agency Administered and the cumulative total of all task letters with a consultant for the same project is less than $100,000, either Project Support Services or the DAS PM assigned to the project shall create a new file folder in the AA Projects - DAS CS.PM file folder on the OneDrive with the following naming protocol – **Project # - Project Name.**
2. If the subject project is Agency Administered and the cumulative total of all task letters with a consultant for the same project is greater than or equal to $100,000, the DAS PM assigned to the project shall create a new file folder in your ADPM's "SPRB Contract Approval" file folder on the OneDrive with the following naming protocol – **Project # - Project Name.**
3. PSS or the DAS PM assigned to the project shall then prepare an On-Call Selection Request, Form 1135, to initiate selection process, upload the draft Form 1135 (in Word format), along with a copy of the completed Form 1105 (signed by DC), and a copy of the corresponding 1105 project budget details to the subject file folder.
4. After both Form 1105, the corresponding 1105 project budget details, and Form 1135 have been uploaded to the subject file folder, copy the link to the subject file folder and paste the link in the On-Call Selection Request Field below. To create a copy of the file folder link, proceed as follows:
   a. Either right click on the subject file folder on the OneDrive on your computer and select "View online" from the dropdown list, or
   b. Click on the AA Projects - DAS CS.PM link and scroll down the list to find the file folder you created;
   c. Hover over the subject file folder from the online OneDrive and click on the ellipsis;
   d. Click on "Copy link";
   e. Paste the link in the On-Call Selection Request field below.

Right click on the applicable hyperlink and select "Open Link in New Tab" to open the file folder structure in SharePoint.

If the “On-Call Checklist Review” file folder was selected, click on the file folder with your ADPM’s initials to open the file folder.

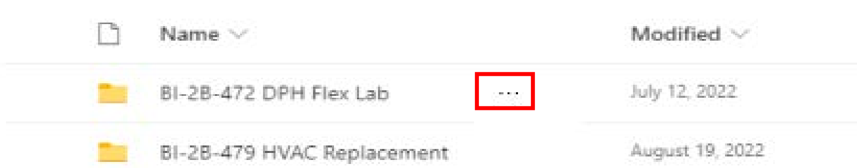


After opening either the appropriate file folder within “On-Call Checklist Review”, or the “SPRB Contract Review“, or the “AA Projects – DAS.CS.PM” file folder under a separate tab, click the “New” button at the top of the page to create a new file folder for the subject project.

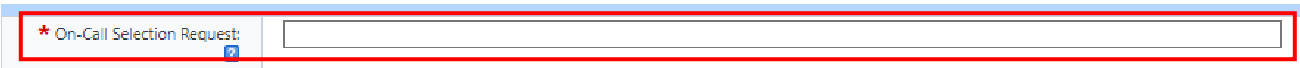


Naming protocol for the project task letter file folder is the **Project Number – Project Name, i.e. BI-2B-472 – DPH Flex Lab.**

Upon completion, hover over the newly created file folder and click on the ellipsis “…”.



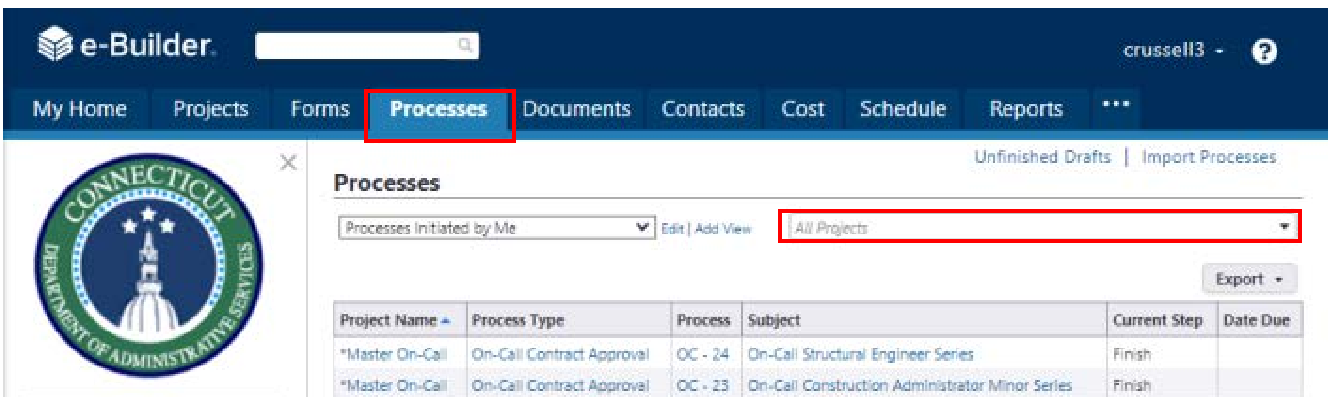
Select "Copy Link" and then paste the link in the "On-Call Selection Request" field in eBuilder and click "Save Draft".



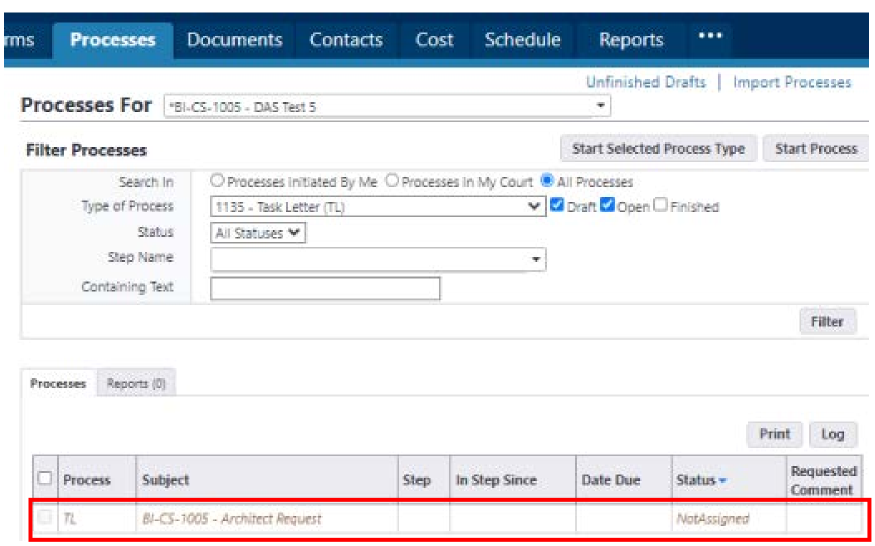
Complete Form 1135 and upload the 1135 and the executed 1105 with the project budget to the project task letter file folder you created.

* If the Form 1135 submission is for a supplemental task on an expired On-Call Contract, also complete and upload a "Supplemental Task Justification Memo" to the project task letter file folder.

After uploading the documents to the project task letter file folder, return to the "Processes" tab in eBuilder and select the subject project from the "All Projects" dropdown list.

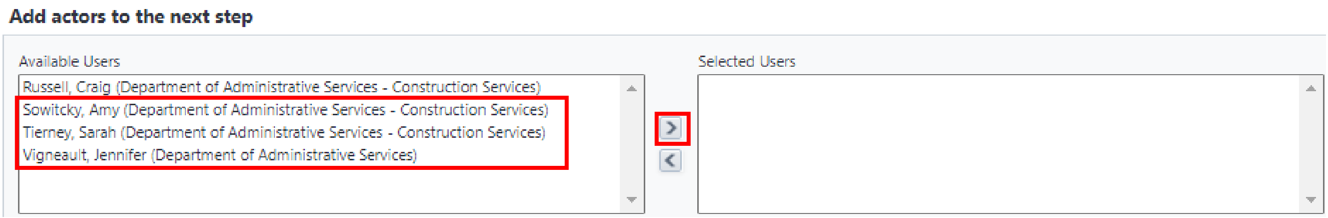


Click on the link to the subject project to open the project process.



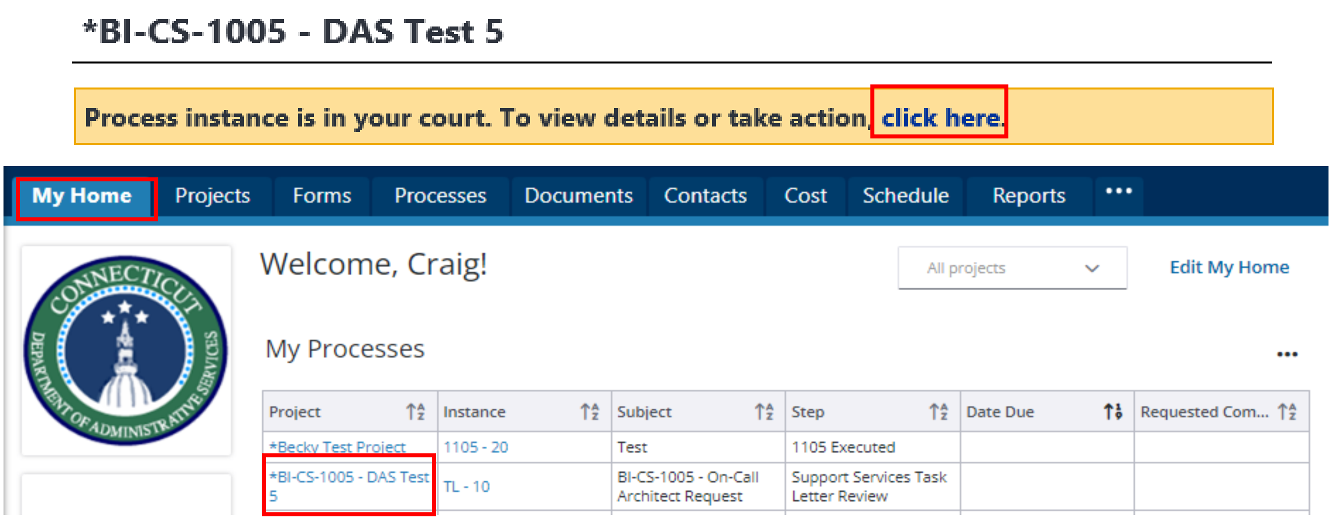
After opening the project process, scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and click on the “Take Action” button.

After clicking the “Take Action” button, you will receive a prompt to select an ADPM to review the 1135 submission. Select the appropriate ADPM from “Available Users” and move them to “Selected Users” by clicking the “>”. Then click “Submit” to submit the request to your ADPM.

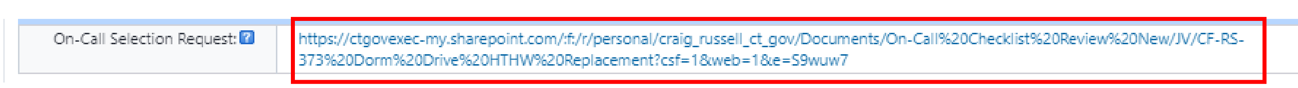


10.03 ADPM 1135 Review (ADPM)

The ADPM will receive an email from eBuilder as notification of the request for On-Call Assignment. To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



After opening the project process, review the “General Instructions” and then click on the file folder project link provided in the “On-Call Selection Request” field to access the On-Call Selection Request (Form 1135) for review.



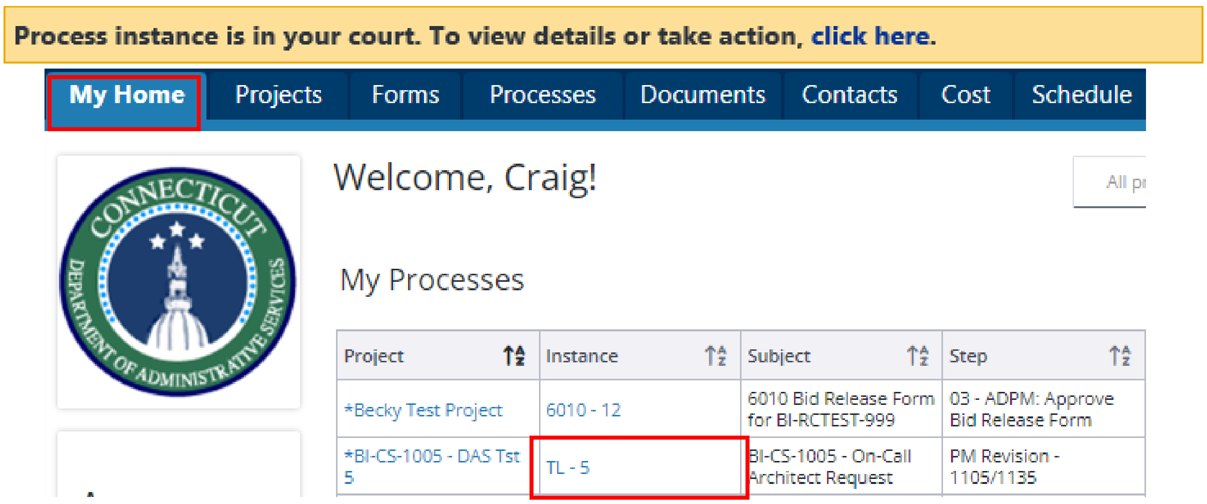
After completing the review, scroll down to the bottom of the page and either select "Submit" from the dropdown list next to the "Take Action" button to forward the On-Call Selection Request to CSS for assignment, or "Revise" to return the On-Call Selection Request to the PM for revision, and click the "Take Action" button. You will be prompted to provide a comment.

If "Submit" was selected, utilize the comment section to provide applicable detail regarding any intricacies to the project that CSS should be made aware of, or if there is a specific consultant that is being requested for this project, please provide that information along with the reason why that specific consultant should be selected.

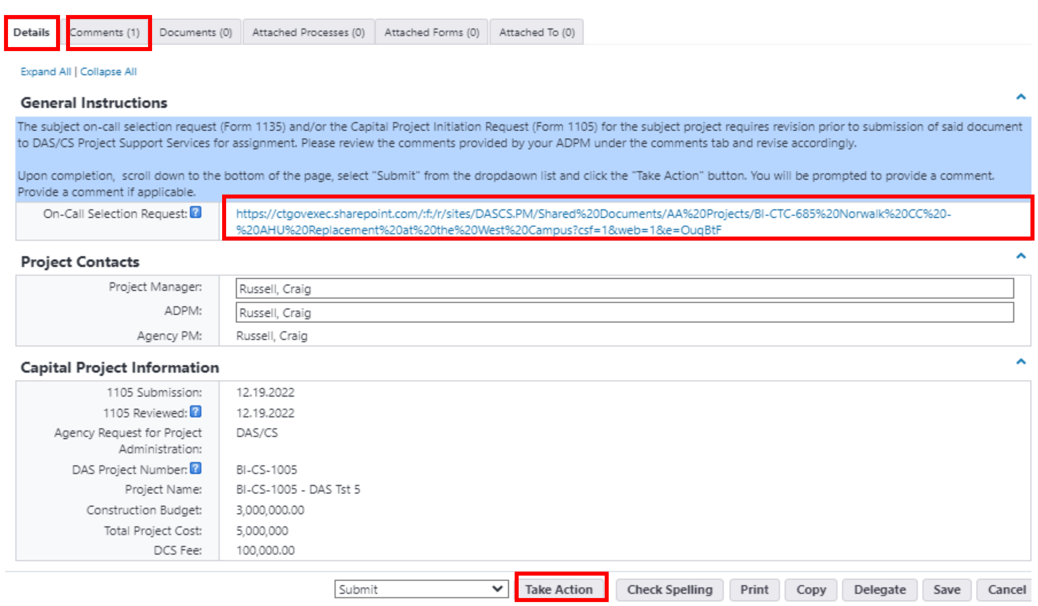
If "Revise" was selected, provide the PM with direction on the revisions required to process the submission for approval in the comment section.

10.04 PM Revision – 1105/1135 (PM)

The PM will receive an email from eBuilder as notification that a revision is required to process the request. To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project under the "My Processes" section. The process "Step" will be entitled "PM Revision – 1105/1135".



After opening the project process, review the "General Instructions" under the "Details" tab, and any comments provided under the "Comments" tab. Click on the file folder project link provided in the "On-Call Selection Request" field to access the On-Call Selection Request (Form 1135) Forms for revision and revise accordingly. Upon completion, click "Take Action".



10.05 On-Call Assignment (CSS)

CSS will receive an email from eBuilder as notification of the request for On-Call Assignment.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

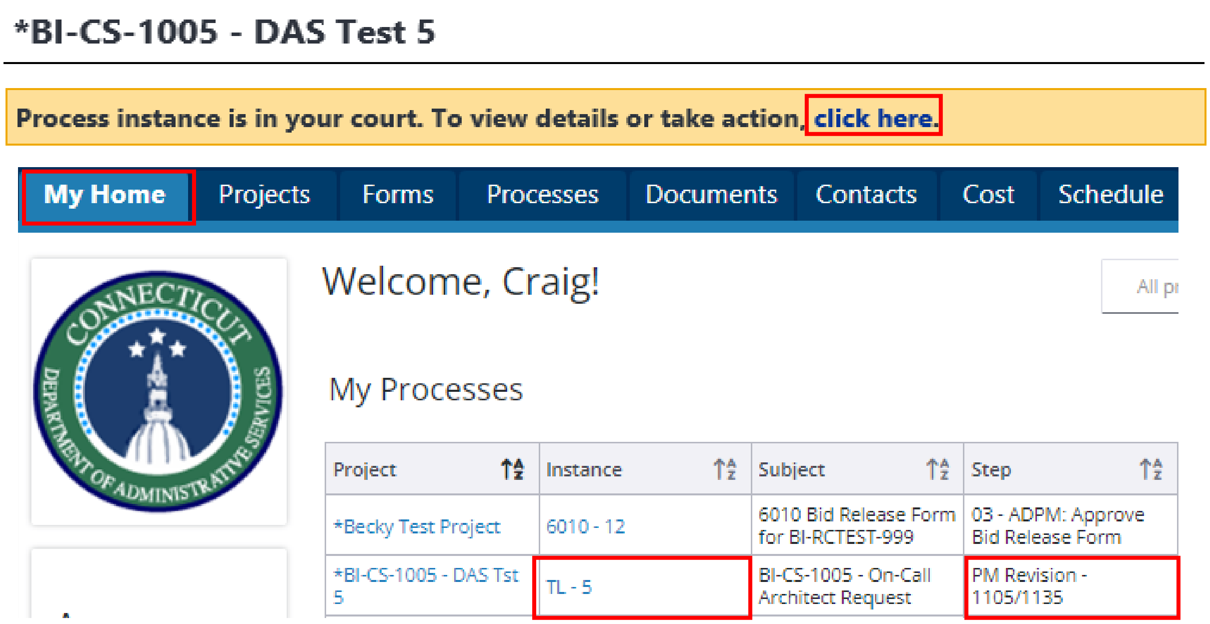
To access the On-Call Selection Request (Form 1135), click on the file folder project link provided in the “On-Call Selection Request” field.

CSS shall then review Form 1135, assign a Consultant to the project, upload the executed Form 1135 to the project file folder, complete filling out the “On-Call Information” section in eBuilder and click “Submit” to spawn the “Task Letter Cost Integration” process. After completing the Task Letter Cost Integration process, CSS will click the “Take Action” button to forward the assigned request to the PM to begin preparing the task letter package.

10.06 Prepare Task Letter Package (PM)

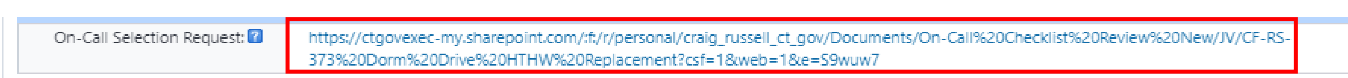
The PM will receive an email from eBuilder as notification that a revision is required to process the request for On-Call Assignment.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project under the “My Processes” section. The process “Step” will be entitled “PM Revision – 1105/1135”.



After opening the project process, **review the instructions provided under the “On-Call Consultant Request” section to begin preparing the task letter package for submission.**

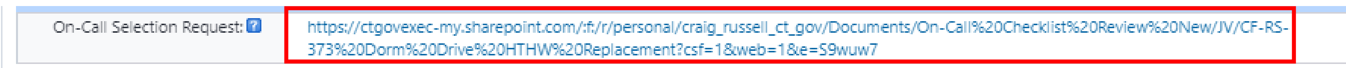
To access the On-Call Assignment, click on the file folder project link provided in the “On-Call Selection Request” field.



After opening the project process file folder, open the executed Form 1135 from the project file folder to see the consultant assigned to the project and schedule the scope review meeting. No action will be taken in eBuilder until the draft task letter package is complete.

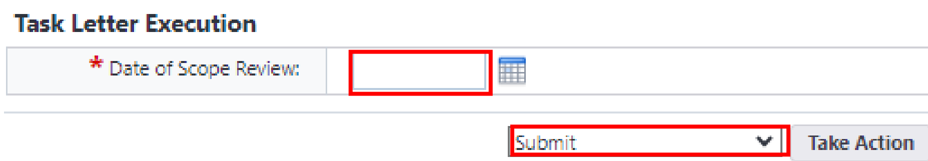
Upon completion of the draft task letter package, log back into eBuilder, select the “My Home” tab, and click on the subject project from the list under “My Processes”.

Right click on the file folder project link provided in the “On-Call Selection Request” field and select “Open Link in New Tab”.



Upload the applicable documents, listed in the instructions, to the file folder to complete the task letter package for submission.

Return to the open eBuilder tab and enter the “Date of Scope Review”, select “Submit” from the dropdown list and click the “Take Action” button.



10.07 Support Services Review (CSS)

CSS will receive an email from eBuilder as notification of the request for On-Call Assignment.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

Right click on the file folder project link provided in the “On-Call Selection Request” field and select “Open Link in New Tab”.

Review the task letter package submission.

If the value of the task letter, or if a supplemental task the cumulative value of all task letters, is less than $100,000, or in the case of CSCU or the Judicial Branch the cumulative value of all task letters is less than $300,000, CSS shall conduct the initial review of said task letter, and if applicable, revise and return the task letter to the PM for review and revision.

If the value of the task letter, or if a supplemental task the cumulative value of all task letters, is greater than $100,000, or in the case of CSCU or the Judicial Branch the cumulative value of all task letters is greater than or equal to $300,000, CSS shall forward the task letter package to the ADPM to conduct the initial review of said task letter.

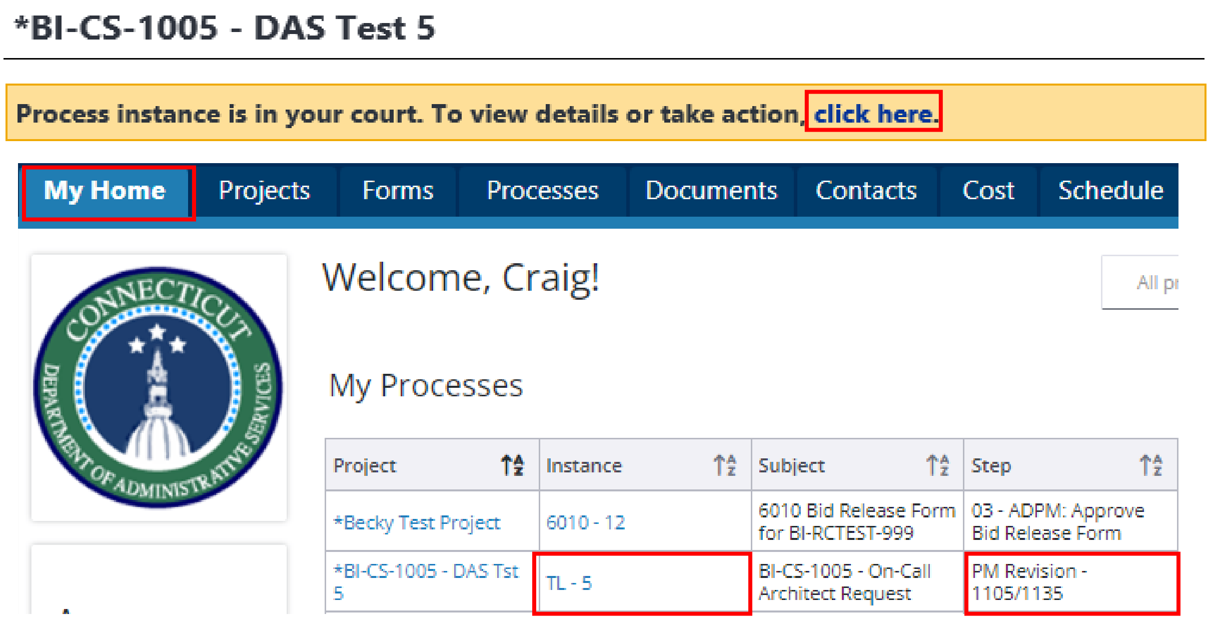
After the value of the task letter has been confirmed, and if applicable, the task letter has been reviewed by CSS, CSS will return to the open tab in eBuilder and complete the “On-Call Information” and “Task Letter Execution” sections.

Upon completion, CSS will either select “Revise” from the drop-down list, next to the “Take Action” button, to return the task letter package to the PM revision or select “Submit” to forward the task letter package to the ADPM for review. After taking action, CSS will be prompted to provide a comment regarding the proposed revisions for the PM or a comment regarding the type of review the ADPM is to conduct prior to submitting the package to Legal.

10.08 Task Letter Revision (PM)

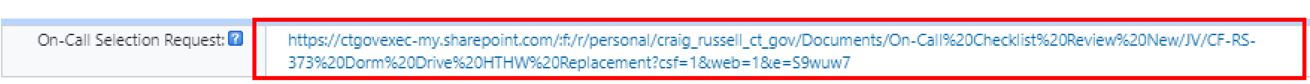
If "Revise" was selected in the previous or consequent step, the task letter package is returned to the PM. The PM will receive an email notification from eBuilder that the task letter package has been returned and the task letter package will also appear in eBuilder under "My Processes" within the "My Home" tab in eBuilder.

The PM can either click on the email link to connect to the subject project process in eBuilder, or the PM can access the project process by logging into eBuilder, selecting the "My Home" tab, and clicking on the link in the "Instance" column for the subject project from the "My Processes" section.

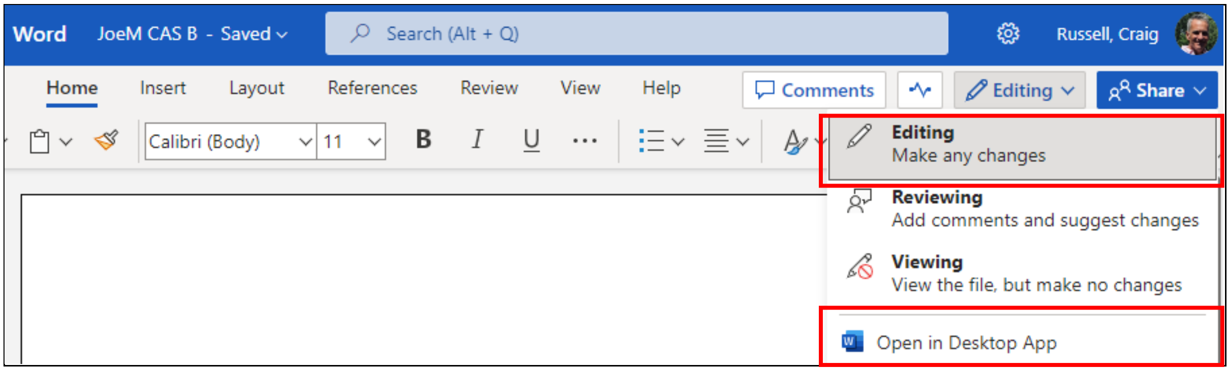


After gaining access to the project, within the task letter process, the PM should review the "Comments" tab for additional information regarding proposed revisions.

After reviewing the comments, the PM should re-open the "Details" tab and right click on the file folder project link provided in the "On-Call Selection Request" field, and select "Open Link in New Tab" to open the project file. The PM should review the proposed task letter revisions, and if applicable, accept said revisions and/or make additional revisions for resubmission.



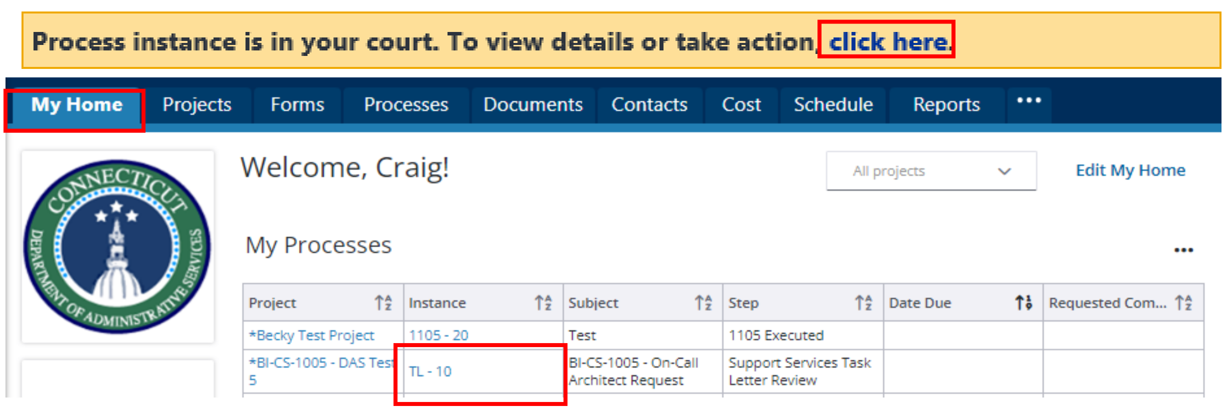
* **User Tip** – To get more accessibility when editing a Microsoft Word document in SharePoint, double click on the subject document to open it in SharePoint. After opening the document in SharePoint, make sure the dropdown list next to "Share" is in "Editing" mode and select "Open in Desktop App". This will allow you to open the document in your desktop to make edits and those edits will automatically be save to the document in SharePoint.



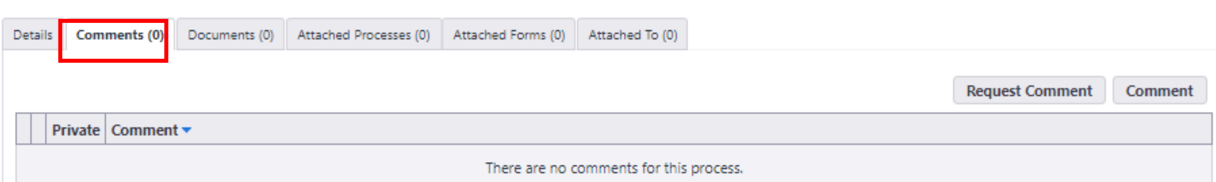
After completing the review, return to the open eBuilder tab, select "Submit" from the dropdown list and click on the "Take Action" button.

10.09 ADPM Review (ADPM)

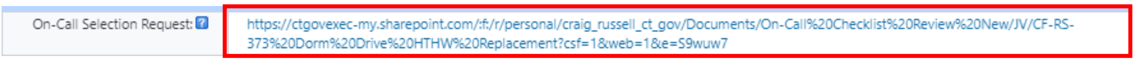
The ADPM will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action. To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.



After opening the project in eBuilder, select the "Comments" tab to note whether the task letter was initially reviewed by CSS for their review and submission to the Legal Director for final approval or if the ADPM is to conduct the initial review and submit the task letter package for legal for assignment and SPRB review.



After reviewing the comments, re-open the “Details” tab and then right click on the file folder project link provided in the “On-Call Selection Request” field, select “Open Link in New Tab” to open the project file to review the draft task letter, and if applicable, recommend additional revisions prior to submission to legal.



After completing the review, return to the open eBuilder tab, scroll down to the bottom of the page and either select “Revise” from the drop-down list next to the “Take Action” button to return the task letter package to CSS to complete the revision; or select “Submit” to forward the task letter package to the Legal Director for final review and approval or for assignment and SPRB Approval.

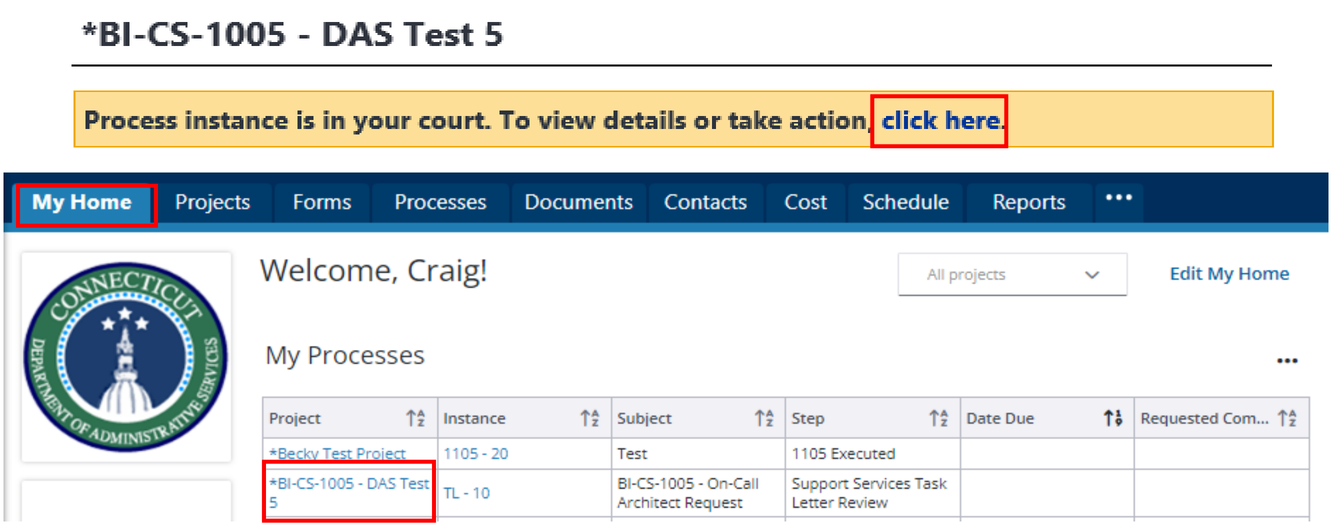
* If “Revise” was selected, the ADPM will be prompted to provide a comment after clicking the “Take Action” button to provide direction for revising the task letter package for resubmission.

10.10 Legal Assignment/SPRB Review or Legal Director Review (Legal Director)

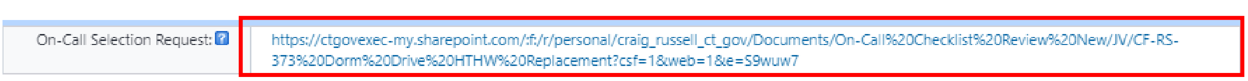
If the cumulative value of all task letters is less than $100,000 (or if CSCU or JD less than $300,000):

The Legal Director will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



To review the task letter package, right click on the file folder project link provided in the “On-Call Selection Request” field and select “Open Link in New Tab”. The project file folder will open with the draft task letter package inside for review, and if applicable, revision.



After reviewing the comments, re-open the “Details” tab and then right click on the file folder project link provided in the “On-Call Selection Request” field, select “Open Link in New Tab” to open the project file to review the draft task letter, and if applicable, recommend additional revisions prior to submission to legal.

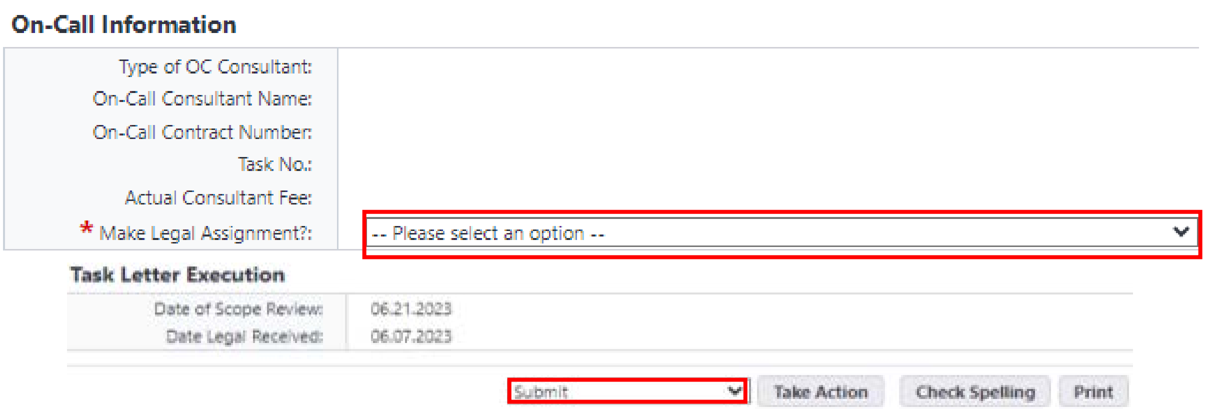
Upon completion of the task letter review, return to the open eBuilder tab and scroll down to the bottom of the page and either select “Revise” from the drop-down list next to the “Take Action” button to return the task letter package to CSS for additional revision or select “Submit” to forward the task letter package to CSS for processing through DocuSign (Step Eleven).

If the cumulative value of all task letters is greater than or equal to $100,000 (or if CSCU or JD greater than or equal to $300,000):

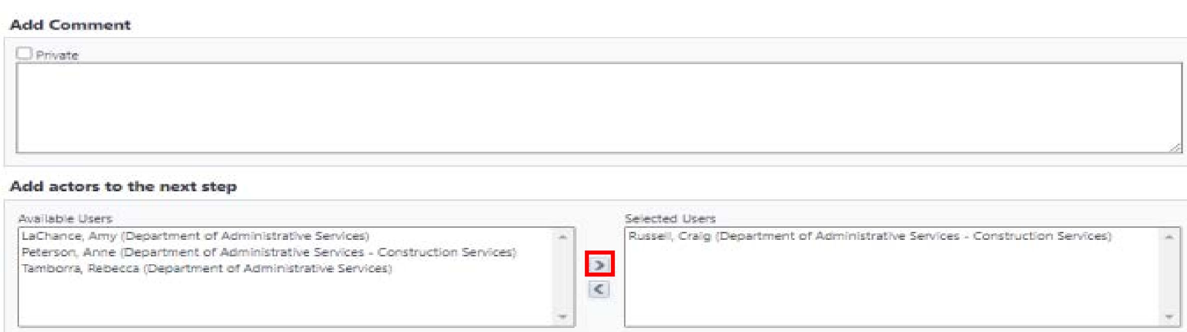
The Legal Director will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

After opening the project in eBuilder, answer the “Make Legal Assignment?” question by selecting “Yes” from the dropdown list and then will select “Submit” from the dropdown list next to the “Take Action” button and click the “Take Action” button to proceed to the next step.



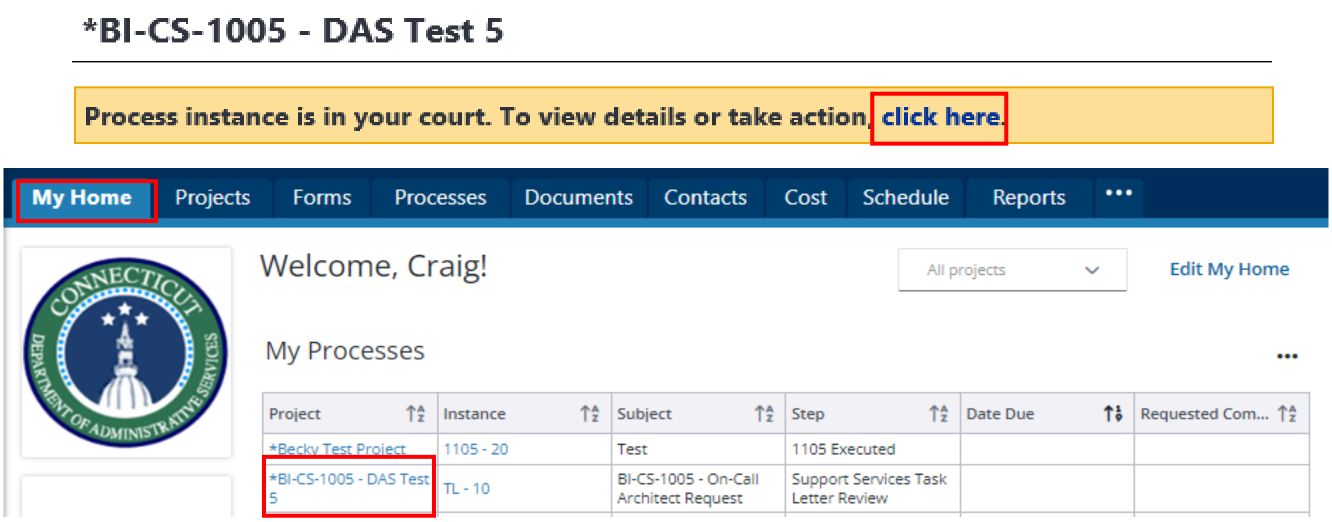
After the “Take Action” button has been clicked, a prompt will be displayed to provide a comment, and a list of Attorneys and Paralegals will be visible to select from for assignment. Click on the Attorney and Paralegal to be assigned, and then click on the “>” to move the Attorney from the “Available Users” to the “Selected Users” section and click “Submit” to make the assignment.



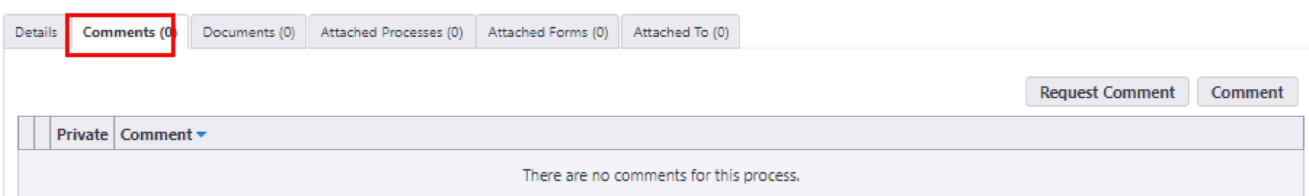
10.11 OLAPP Review (OLAPP – Attorneys & Paralegals)

The OLAPP Attorney assigned to the project will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

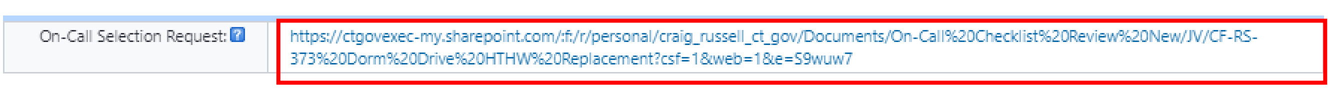
To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



After opening the project process in eBuilder, select the “Comments” tab to note comments provided by previous actors in the process.



After reviewing the “Comments”, return to the “Details” tab, right click on the file folder project link provided in the “On-Call Selection Request” field, and select “Open Link in New Tab”. The project file folder will open with the draft task letter package inside for review, and if applicable, revision.

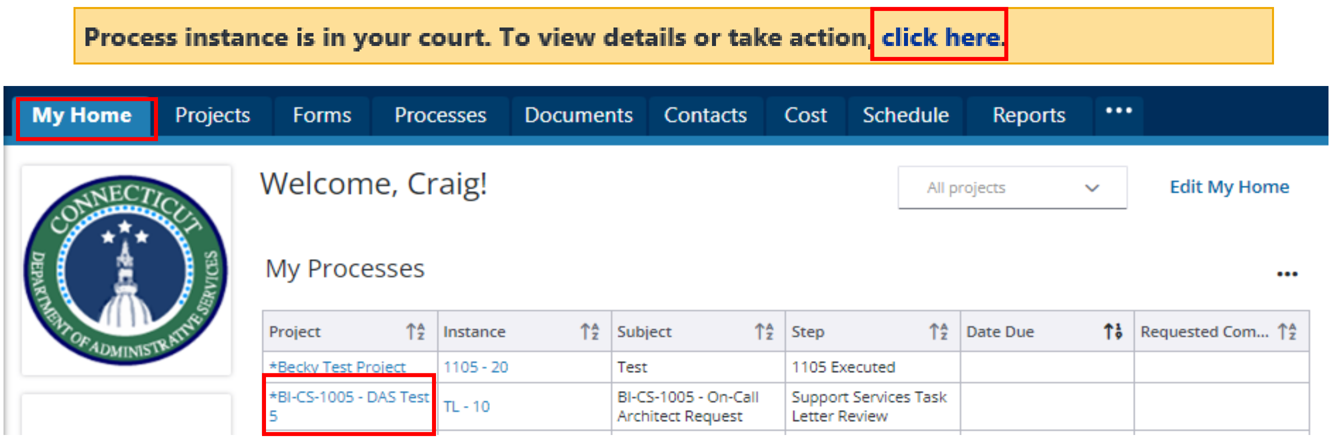


Upon completion of the task letter review, return to the open eBuilder tab and scroll down to the bottom of the page and either select “Revise” from the drop-down list next to the “Take Action” button to return the task letter package to the PM for revision or select “Submit” to forward the task letter package to the assigned Paralegal for submission to SPRB.

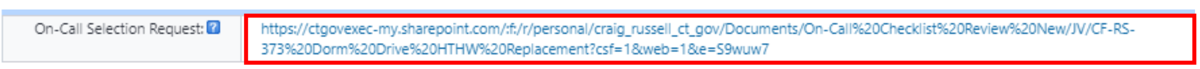
10.12 SPRB Review (OLAPP - Paralegals)

The OLAPP Paralegal assigned to the project will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

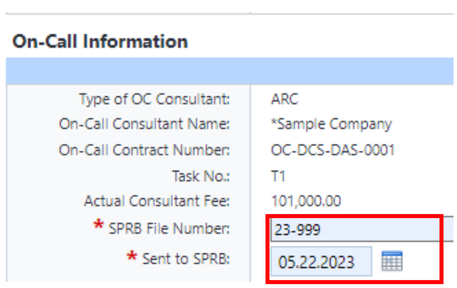
To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



After opening the project process in eBuilder, right click on the file folder project link in the “On-Call Selection Request” field and select “Open Link in New Tab” to access the task letter package.



Download the applicable task letter package for submission to SPRB and provide the “SPRB File Number” and the date “Sent to SPRB” under the section entitled “On-Call Information”. Then scroll down to the bottom of the page and click the “Take Action” button to proceed to the next step.



The subject task letter package will not be submitted to SPRB through eBuilder. The TL Package should be submitted to SPRB through normal means for their review.

10.13 SPRB Approval (OLAPP - Paralegals)

After SPRB has completed their review, select the “My Home” tab again, and click on the link to the subject project from the “My Processes” section to open the process in eBuilder. Once opened, scroll down to the section entitled “On-Call Information” and provide the date “Approved by SPRB”, if applicable. Then, follow the “General Instructions” provided to “Approve”, “Revise”, or “Void” the task letter package and click the “Take Action” button to proceed to the next step in the process.

10.14 Process Task Letter through DocuSign (OLAPP-Paralegals)

If “Approved” by SPRB, the task letter package will proceed to this placeholder step to allow for the OLAPP Paralegal to process the task letter through DocuSign.

As was the case in the previous step, the assigned OLAPP Paralegal will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action and will appear under “My Home” tab in the “My Processes” section in eBuilder to take action.

Again, the OLAPP Paralegal can either click on the email link to connect to the project process in eBuilder or can click on the link to the subject project from the “My Processes” section, under the “My Home” tab, to connect to the project process (refer to diagrams in Step 11).

After opening the project process, the paralegal should right click on the file folder project link in the “On-Call Selection Request” field and select “Open Link in New Tab” to gain access to the task letter package file folder, download the final version of the subject task letter, and process the task letter through DocuSign.

After initiating the processing of the task letter through DocuSign, the paralegal should return to the open eBuilder tab, scroll down to the bottom of the page, select “Submit” from the dropdown list next to the “Take Action” button and click on the “Take Action” button.

10.15 Process Task Letter through DocuSign (CSS)

CSS will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action and will appear under “My Home” tab in the “My Processes” section in eBuilder to take action.

CSS will access the project file folder, download the final version of the task letter and process the task letter through DocuSign.

After initiating the processing of the task letter through DocuSign, select “Submit” from the dropdown list next to the “Take Action” button and click on the “Take Action” button.

10.16 Task Letter Executed (CSS)

CSS will receive an email from eBuilder as notification that the task letter has been processed through DocuSign.

CSS will access the project process, complete the “Task Letter Executed” section of eBuilder, upload a copy the executed task letter to the “Task Letter Executed” field for placement in the project file (Pre-Construction/On-Call Task Letters), and select “Submit” to complete the task letter process.

Section 11: Contract and Amendment Process

THIS PROCESS IS CURRENTLY UNDER DEVELOPMENT

11.01 Accessing the Process (OLAPP Procurement or PM)

Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f

On your homepage, Go to the "Processes" tab and select the subject project for which you wish to draft a Contract or Amendment from the from the "All Projects" dropdown list. If the Contract or Amendment to be drafted is an On-Call, select "*Master On-Call" from the "All Projects" dropdown list.

Select "Contract and Amendment" from the "Type of Process" dropdown list and click "Start Selected Process Type".

11.02 Selecting the Contract Type (OLAPP Procurement or PM)

Select the type of Contract being submitted for approval from the "Contract Submission Type" dropdown list and click the "Take Action" button.

11.03 Selecting the Document Type (OLAPP Procurement or PM)

Select the type of document being submitted for approval from the "Document Type" dropdown list and click the "Take Action" button.

Section 11A: On-Call Contract Approval

THIS PROCESS IS CURRENTLY UNDER DEVELOPMENT

11A.01 On-Call Contract Series Initiation (OLAPP Procurement)

Create an On-Call Contract Series file folder on the OneDrive by clicking on the following hyperlink: "On-Call Consultant Services".

Hover the cursor over the file folder entitled “OC-DCS-(Series Number) and click on the ellipsis "...".

Select "Copy to" and then click “Copy here”. A prompt will appear “1 item wasn’t copied…”. Click “Keep both”.

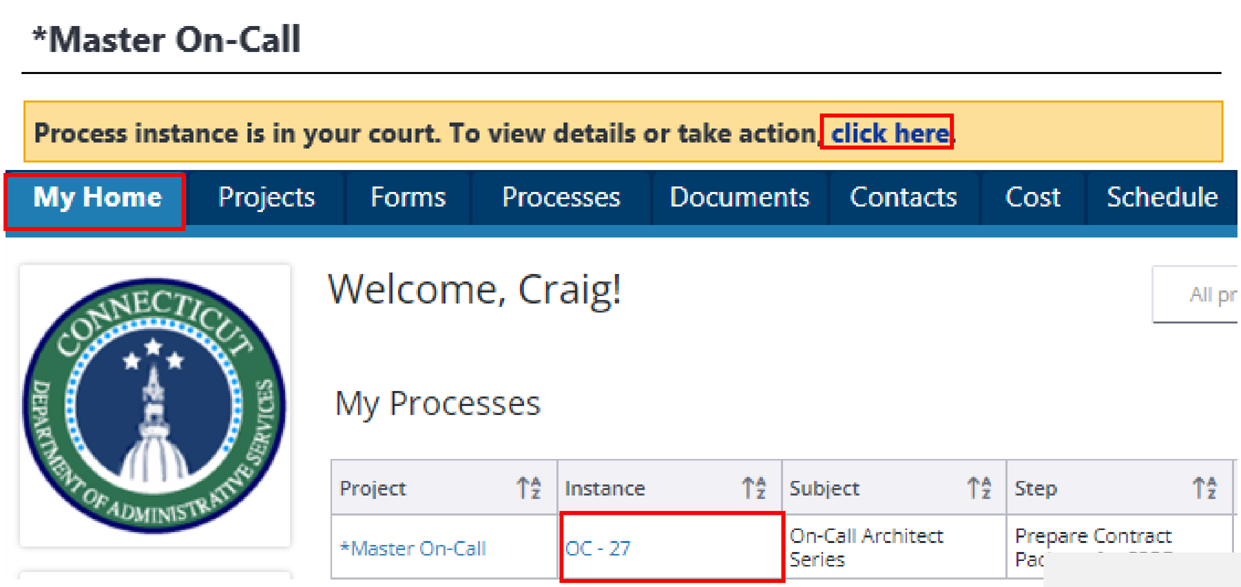
Hover the cursor over the file folder entitled “OC-DCS-(Series Number)1 and click on the ellipsis "...". Select “Rename” and rename the newly pasted file folder with the subject On-Call Series Number, i.e. OC-DCS-ARC-0073-0078.

Hover the cursor over the renamed file folder and select “Copy link”. Paste the link in the "Contract Approval File Folder" field in the "On-Call Contract Series" section.

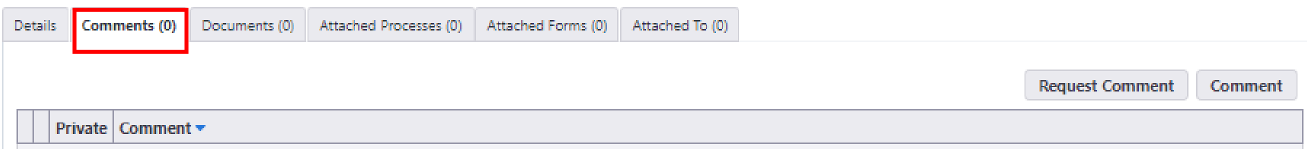
Provide data input for the remaining fields in “On-Call Contract Series” section. Upon completion of data input and after uploading the respective supporting documents, scroll down to the bottom of the page and press the "Take Action" button.

Note: If legal requires additional documentation and/or information regarding the subject On-Call Contract Series submission, OLAPP Procurement will receive an email from eBuilder as notification that additional documentation and/or information is required.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process instance link from the “My Processes” section.



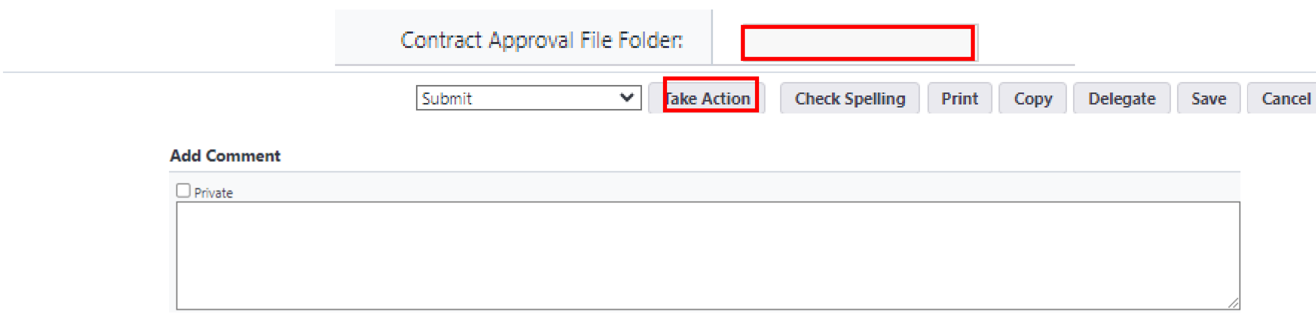
Click on the “Comments” tab to see what additional information or documentation is required.



If additional documentation is required, return to the “Details” tab and click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Upload the respective supporting documents to the “Supporting Documents” file folder and scroll down to the bottom of the page and press the "Take Action" button.

If additional information is required, scroll down to the bottom of the page and press the "Take Action" button.

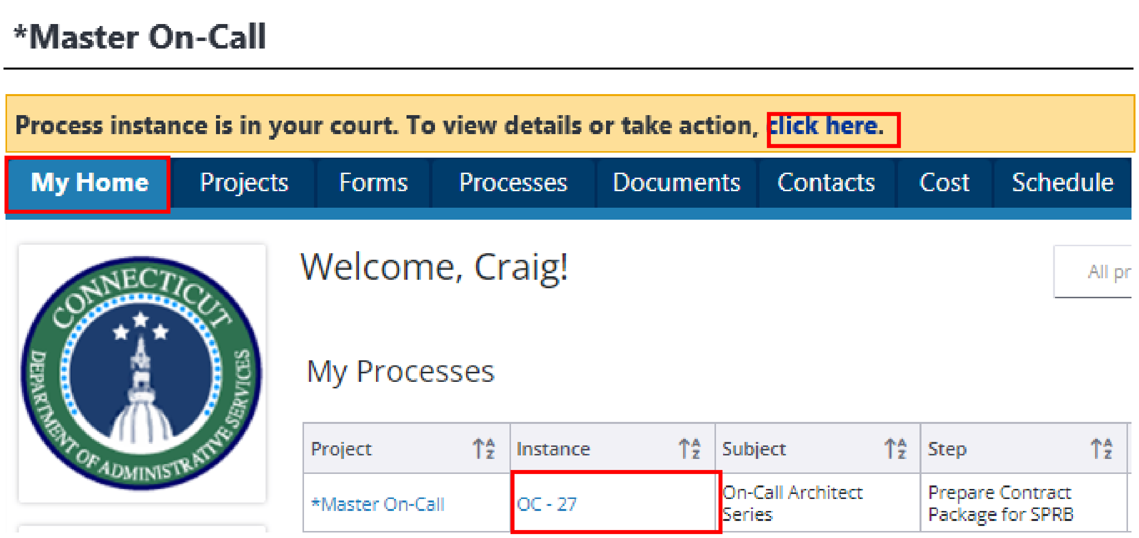
After clicking the “Take Action” button a prompt will appear that will allow you to provide a comment regarding the request for additional documentation and/or information. After providing the comment, click “Submit”.



11A.02 On-Call Contract Series Initiation (CSS)

CSS will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a new On-Call Contract Series.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process instance link from the “My Processes” section.



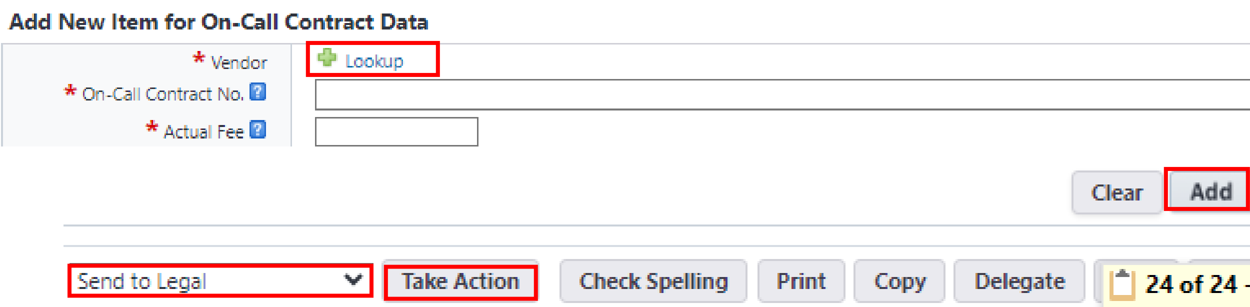
Refer to the "On-Call Contract Checklist" field in the “On-Call Contract Series” section for a list of the documents submitted.

Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Open the "Supporting Documents" file folder to view the "On-Call Contract Checklist" documents.

Open the On-Call Selection Approval Memo on your desktop and return to the On-Call Contract Series file folder. Rename each of the individual On-Call Contract file folders, starting with the first number in the On-Call Contract Series and the first firm name from the On-Call Selection Approval Memo. Repeat this step until all of the firm names from the On-Call Selection Approval Memo have their own file folder.

Return to the process instance to complete the section entitled “On-Call Contract Data”.

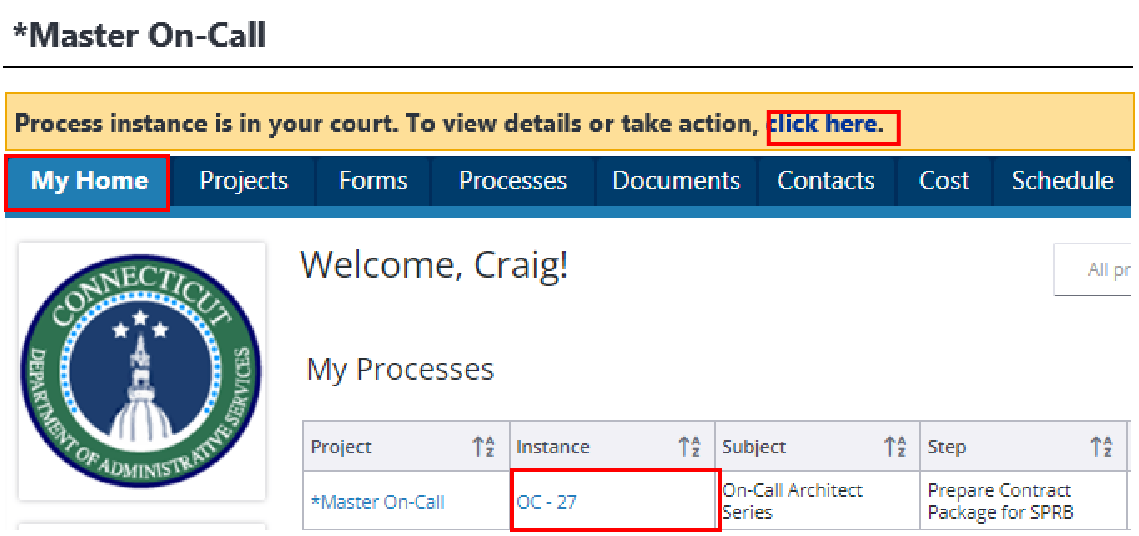
Under the subsection entitled “Add New Item for On-Call Contract Data”, click the “Lookup” link in the “Vendor” field to lookup the first “Vendor” selected from the On-Call Selection Approval Memo, answer the remaining questions in the section, and click “Add”. Repeat this process for each selected Vendor. Upon completion, select “Send to Legal” from the dropdown list next to the “Take Action” button and click “Take Action”.



11A.03 Legal Assignment (Legal Director)

The Legal Director will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a new On-Call Contract Series.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



Refer to the "On-Call Contract Checklist" field in the “On-Call Contract Series” section for a list of the documents submitted.

Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Double click on the "Supporting Documents" file folder to view the "On-Call Contract Checklist" documents.

If additional documentation is required to initiate the drafting of said contract, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button and then click the "Take Action" button. A prompt will appear to add a comment for the request of additional documentation.

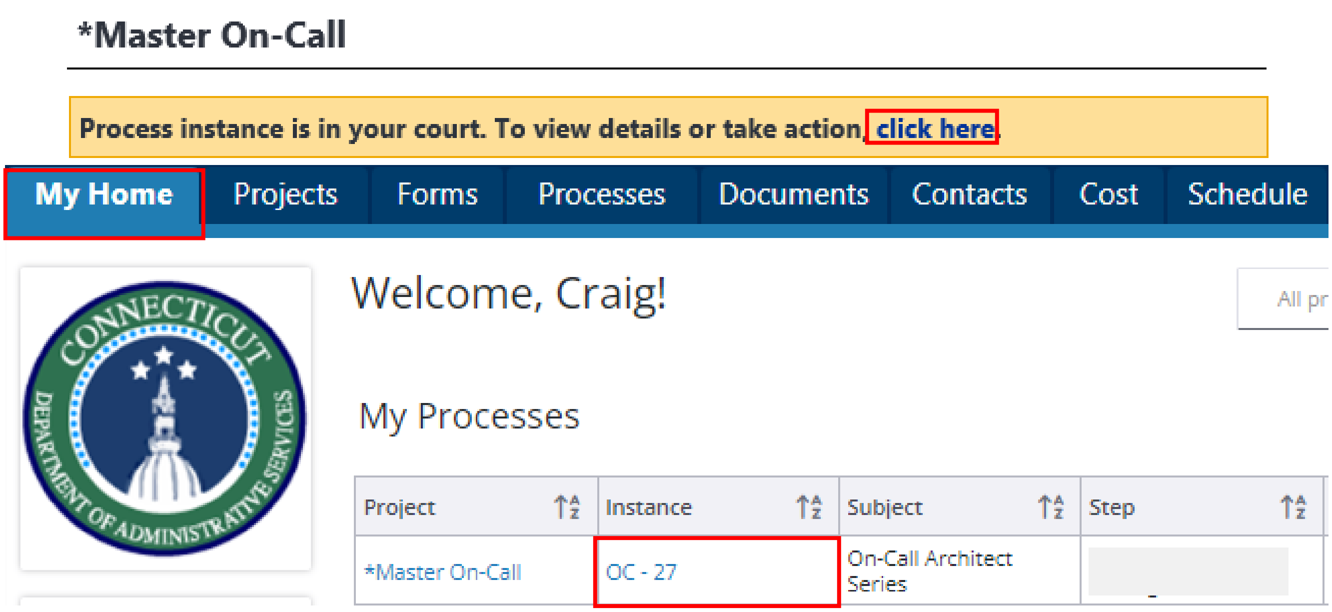
If the necessary documentation has been submitted, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and then click the "Take Action" to assign an Attorney and a Paralegal to draft the contract.

After the “Take Action” button has been clicked, a prompt will be displayed to provide a comment, and a list of Attorney’s and Paralegals will be visible to select from for assignment. Click on the name of the Attorney and Paralegal to be assigned, and then click on the “>” to move the Attorney and Paralegal from the “Available Users” to the “Selected Users” section. Click “Submit” to make the assignment.

11A.04 Draft Contract/Credential Review (Attorney and/or Paralegal)

The Attorney and/or Paralegal assigned to draft the subject On-Call Contract Series will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a new On-Call Contract Series.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



Refer to the "On-Call Contract Checklist" field in the “On-Call Contract Series” section for a list of the documents submitted.

Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Double click on the "Supporting Documents" file folder to view the "On-Call Contract Checklist" documents.

Complete data input for the “On-Call Checklist for Credential Review” field in the “On-Call Information” section. Upload copies of each of the respective documents checked off to the respective file folder listed in the field instructions.

Prepare a draft contract for the subject On-Call Contract Series.

Upon completion of the draft contract, click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Upload a copy of the draft contract to the “Drafts” subfolder within the subject On-Call Contract Series file folder.

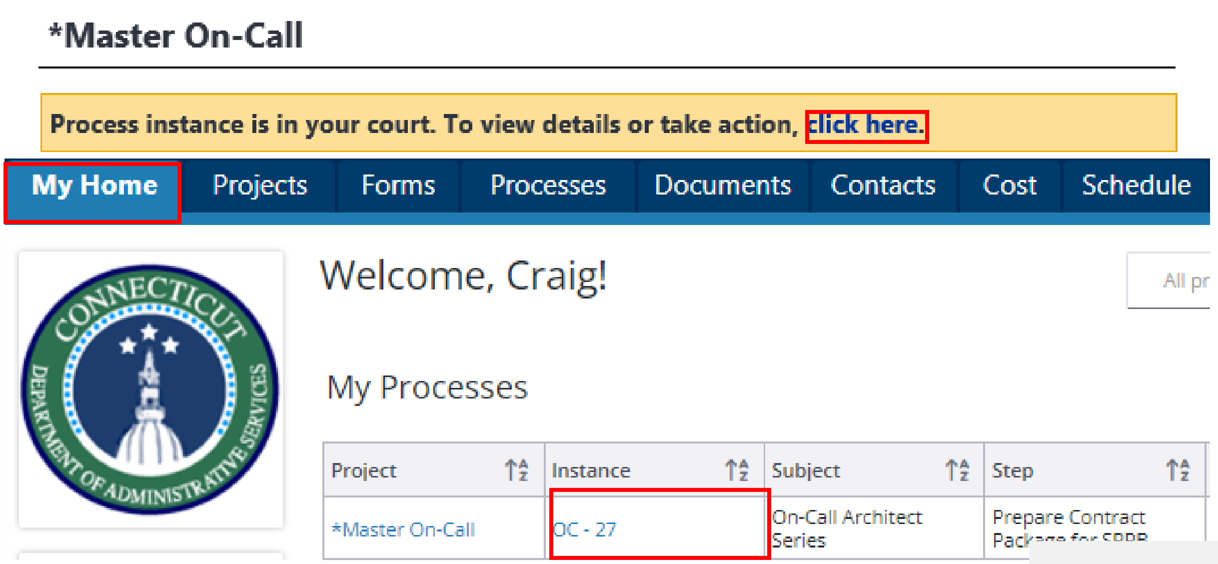
After completing the draft contract, the data input, and after all of the required documents have been uploaded to the respective file folders, scroll down to the bottom of the screen and click the “Take Action” button to submit the draft to the Legal Director for review and approval.

Note: If all of the required documentation has not yet been submitted by selected firms by the time the draft On-Call Contract is ready for the Legal Director to review, you can proceed with clicking the “Take Action” button and finish the data input and uploading the required documents in step 11A.06 - Prepare On-Call Contract Packages for SPRB Review.

11A.05 Legal Director Contract Review

The Legal Director will receive an email from eBuilder as notification that the draft contract for the subject On-Call Contract Series is ready to be reviewed.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Open the "Drafts" file folder to view the draft Contract. Open the “Credentials and Insurance”, and “Supporting Documents” file folders to review such documents related to the On-Call Series Contract.

Review and revise the draft contract as needed. Upon completion of your review, scroll down to the bottom of the page and select one of the following from the dropdown list next to the "Take Action" button:

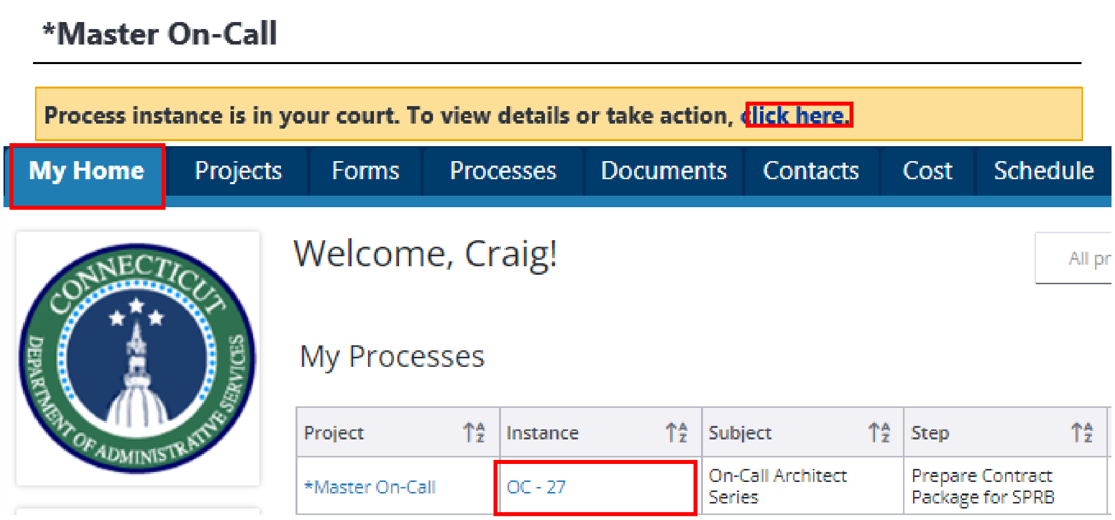
- Select "Return" and then click the "Take Action" button to return the draft to the Attorney and/or Paralegal assigned to the project for additional review and revision; or
- Select "Submit" and then click the "Take Action" button to forward the process to Attorney and/or Paralegal assigned to the project to finalize the On-Call Contract for each of the selected firms and further prepare the On-Call Contract Series package for SPRB review.

After clicking the "Take Action" button, a prompt will appear to allow for comments related to the draft agreement and to again select the Attorney and/or Paralegal assigned to the project to complete the next step in the process. After providing your comments and making your selection, either click the "Return" or "Submit" button.

11A.06 Prepare On-Call Contract Packages for SPRB Review (Attorney and/or Paralegal)

The Attorney and/or Paralegal assigned to the subject On-Call Contract Series will receive an email from eBuilder as notification that the Legal Director has completed a review of the draft contract and the Attorney and/or Paralegal can finalize the draft contract for each of the selected firms and begin preparing the On-Call Contract Series package for SPRB review.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.



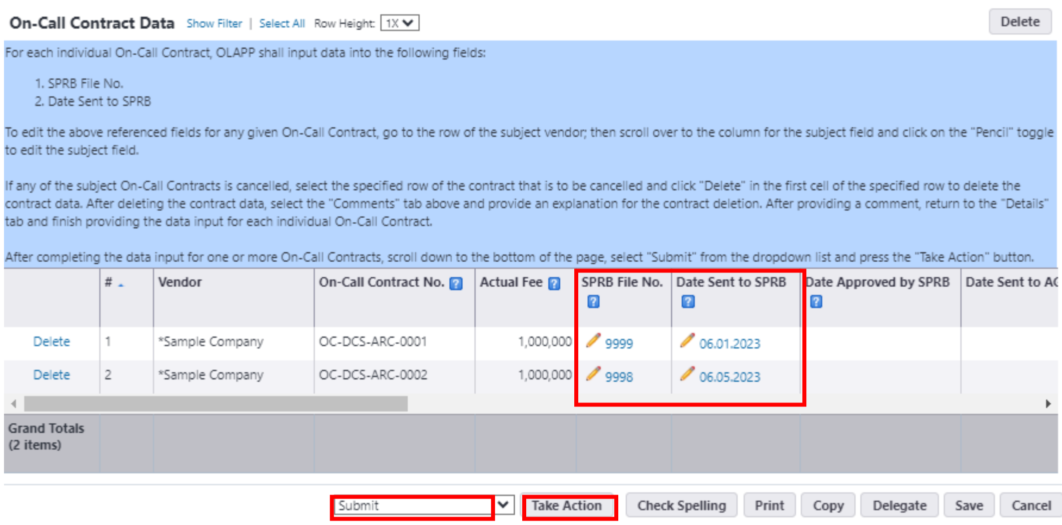
Complete data input for the “On-Call Checklist for Credential Review” and "On-Call SF the “On-Call Information” section.

Click on the link in the "Contract Approval File Folder" field, in the “On-Call Contract Series” section, to open the subject On-Call Contract Series file folder. Upload copies of each of the respective documents checked off in the “On-Call Checklist for Credential Review” and "On-Call SPRB Checklist" fields to the respective file folders listed in the field instructions.

Upload copies of the final draft Contract for each of the selected firms to the SPRB file folder and into the "Drafts" subfolder within each respective "On-Call Contract" file folder.

Complete data input for the "SPRB File No." and "Date Sent to SPRB" fields in the "On-Call Contract Data" section.

To edit the above referenced fields for any given On-Call Contract, go to the row of the subject vendor; then scroll over to the column for the subject field and click on the "Pencil" toggle ( ) to edit the field.



After completing the data input in the "On-Call Information" and "On-Call Contract Data" sections, and after all of the required documents have been uploaded to the respective file folders, scroll down to the bottom of the screen and click the "Take Action" button.

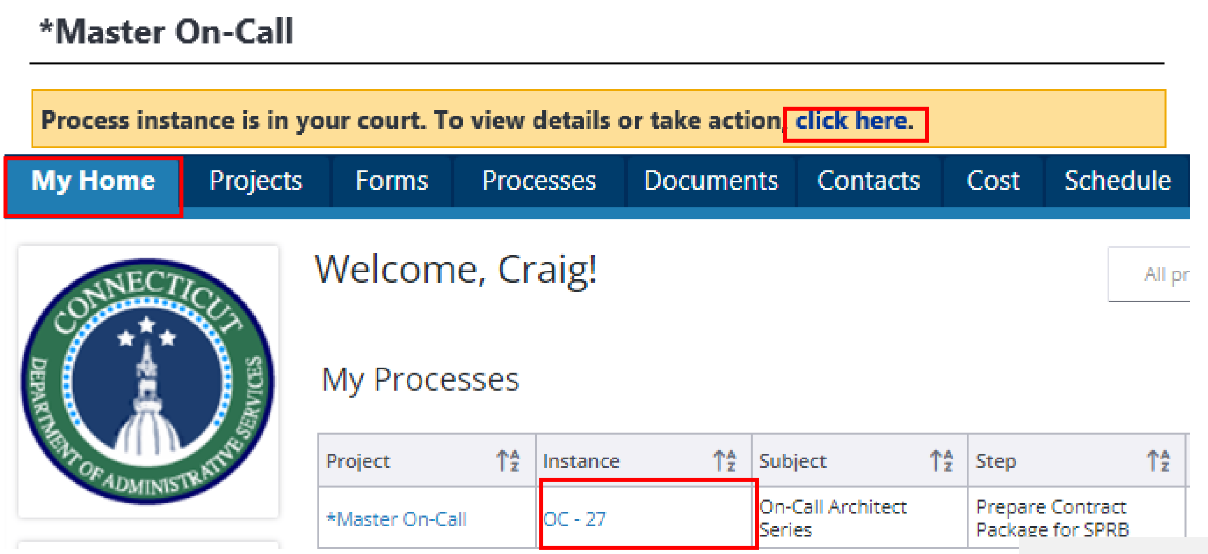
11A.07 SPRB Approval/AG Review (Paralegal)

The Paralegal assigned to the subject On-Call Contract Series will receive an email from eBuilder as notification that the On-Call Contract series has been submitted to SPRB for review and approval. This will serve as a hold step until such time that the SPRB has reviewed and approved one or more of the subject On-Call Series Contracts.

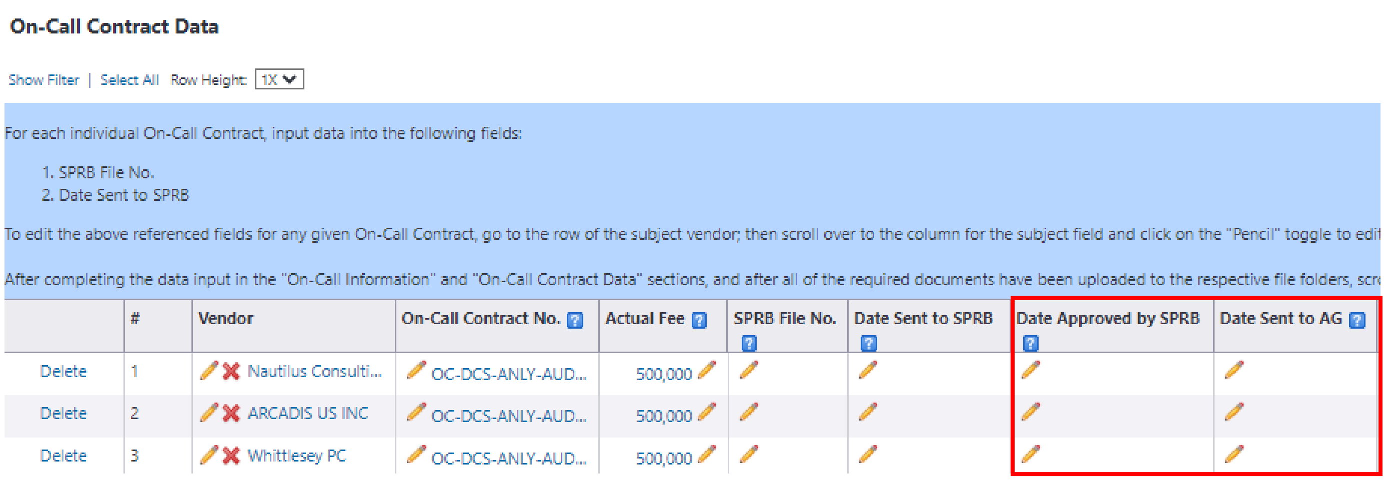
After SPRB has reviewed and approved one more of the subject On-Call Series Contracts, the Paralegal should proceed to process On-Call Series Contracts through DocuSign and prepare the Contracts for sign off by the Attorney General's Office. A copy of each executed On-Call Contract should be sent to CSS upon completion.

After sending the Contracts for sign off, the Paralegal should open the process instance in eBuilder for data input.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

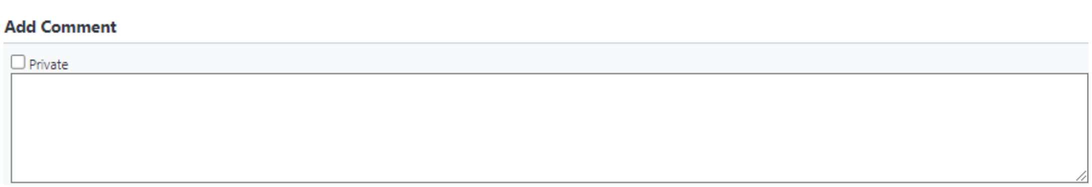


Follow the instructions provided under the “On-Call Contract Data” section and provide the “Date Approved by SPRB” and the “Date Sent to the AG” for each individual On-Call contract. Click on the “Pencil” toggle ( ) under the respective column header to provide the necessary data input.



After completing the data input for one or more On-Call Contracts, scroll down to the bottom of the page and click the "Take Action" button.

After clicking "Take Action", a prompt will appear to allow the Paralegal the opportunity to comment on the SPRB Review and Approval Process. If any of the subject On-Call Series Contracts were suspended or rejected, the Paralegal should provide a listing of those On-Call Contracts and the status of those contracts as being suspended or rejected in the "Comments" box. Upon completion, click "Submit".



Note: If any of the subject On-Call Series Contracts were suspended or rejected, the data input for those respective Contracts will be input by CSS during the Final Review step.

11A.08 Support Services Final Review (CSS)

CSS will receive an email from eBuilder as notification that an On-Call Contract Series has been submitted to the AG for approval. **No action is required by CSS at this time.** After one or more of the On-Call contracts has been processed through DocuSign and executed, the OLAPP – Paralegals will provide CSS with a copy of said contract(s).

Upon receipt of said contract(s), CSS should access the On-Call Contract Approval process by either clicking on the link provided in the email or by logging into eBuilder, selecting the “My Home” tab, and clicking on the link in the “Instance” column for the *Master On-Call project from the “My Processes” section.

After opening the On-Call Contract Approval process in eBuilder, select the “Comments” tab to note comments provided by previous actors in the process.

Select the “Documents” tab and upload copies of the executed On-Call Contracts.

Select the “Details” tab and follow the instructions provided under the section header “On-Call Contract Data” and provide data input for all of the remaining date fields, answer the “Document Uploaded?”, and provide the “CORE Contract No.” for each individual On-Call contract.

* To edit the "Document Uploaded" field for any given On-Call Contract, go to the row of the subject vendor; then scroll over to the column for the subject field and click on the dropdown list within the field to select your response. To edit all other fields, click on the “ “ toggle under the respective column header to provide the necessary data input.

After entering the data for one or more On-Call Contracts, scroll down to the bottom of the page and select "Create OC" from the dropdown list and click the "Take Action" button to proceed to the “On-Call Contract Creation – Cost Integrated” process.

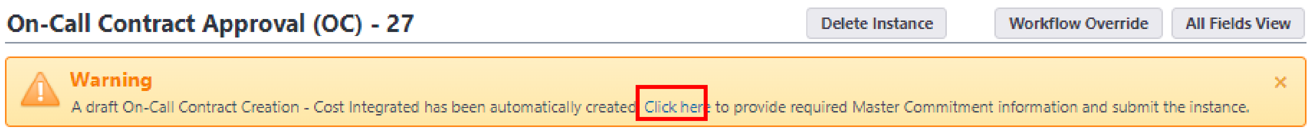
11A.09 On-Call Contract Creation – Cost Integrated (CSS)

CSS will receive an email from eBuilder as notification that one or more of the On-Call Contracts in the contract series has been executed and is ready to be set up as a Master Commitment.

To access the On-Call Contract Creation – Cost Integrated process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Process” column for the “Subject” - “On-Call … Series” from the “My Processes” section.

☐	Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
☐	OC - 23	On-Call Construction Administrator Minor Series	Finish	06.05.2023		Submitted	
☐	OC - 27	On-Call Architect Series	Cost Integrated OC	06.30.2023		Submitted	

Upon opening the On-Call Contract Creation – Cost Integrated process, a warning prompt will appear. Select the “Click here” link in the prompt to proceed to the next step and create the Master Commitment.



In the section entitled “Master Commitment Overview” section, provide data input for the following fields:

1. Master Commitment Type: Select “On-Call Contract” from the dropdown list.
2. Company: Select the vendor from the dropdown list that is assigned to the On-Call Contract.
3. Contact: Select a contact for the subject company from the dropdown list.

In the section entitled “Add New Master Commitment Item” section, provide data input for the following fields:

1. Account Code: Click the “ ” toggle.

   Select one of the following from the “Category” dropdown list:

   a. 10.0 – CA if the subject On-Call Contract is for CA, CA, or Cx services.
   b. 13.0 – Claims if the subject On-Call Contract is for ANLY or Audit services.
   c. 8.0 – A/E for all other On-Call Contract services.

   Select one of the following from the “Code” dropdown list:

   a. 10.130 – CA if the subject On-Call Contract is for CA, CA, or Cx services.
   b. 13.130 – Claims if the subject On-Call Contract is for ANLY or Audit services.
   c. 8.130 – A/E for all other On-Call Contract services.
2. Amount: Input the Award amount for the subject On-Call Contract.

Complete the “Master Commitment Custom Fields” section in its entirety for each individual on-call contract that has been executed. Each individual on-call contract will be submitted separately.

Helpful Hints for completing the “Master Commitment Custom Fields” section

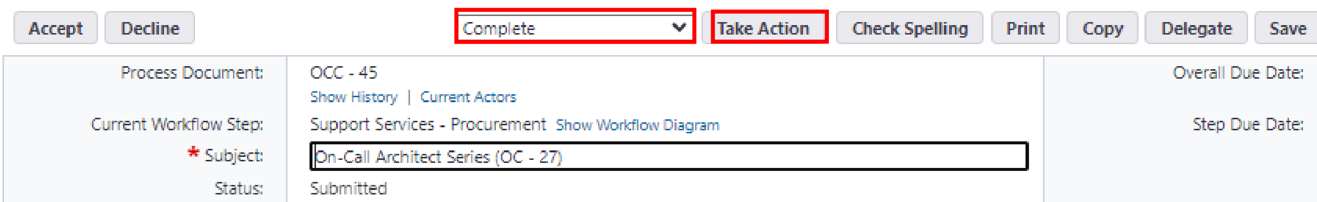
1. Return to the eBuilder webpage tab and select the “Processes” tab.
2. Select “*Master On-Call” from the “All Projects” dropdown list.
3. Click on the link under the “Subject” column header for the respective On-Call Contract Series. This will open the “On-Call Contract Creation – Cost Integrated” process page again. All of the subject On-Call Contract data for each individual On-Call contract will be visible under the “On-Call Contracts” section.

After entering the On-Call Contract data, scroll down to the bottom of the page and select "Submit" from the dropdown list and click the "Take Action" button.

Return to the “Processes” tab and click on the link for the subject On-Call Contract Series.

Answer the question “All Contracts Complete?” under the “On-Call Contract Series” section. Respond “No” to the question each time, until such time that all of the subject On-Call Contracts in the series have been executed and the data input has been completed for each contract.

Select “Complete” from the dropdown list next to the “Take Action” button and click “Take Action” each time an individual On-Call Contract is executed.



When prompted, insert the “Approval Date” and click “Yes, Approve”.

After all contracts have been executed and the data input for each individual contract has been completed, return to the “Processes” tab and click on the link in the “Instance” column for the *Master On-Call project one last time.

Answer the question “All Contracts Complete?” under the “On-Call Contract Series” section. Respond “Yes”, scroll down to the bottom of the page and select “Complete” from the dropdown list next to the “Take Action” button and click “Take Action” to complete the process.

Section 11B: Design Bid Build – DBB

11B.01 (Coming Soon)

Section 11C: Construction Manager at Risk – CMR

11C.01 (Coming Soon)

Section 11D: Design Bid Build – DBB

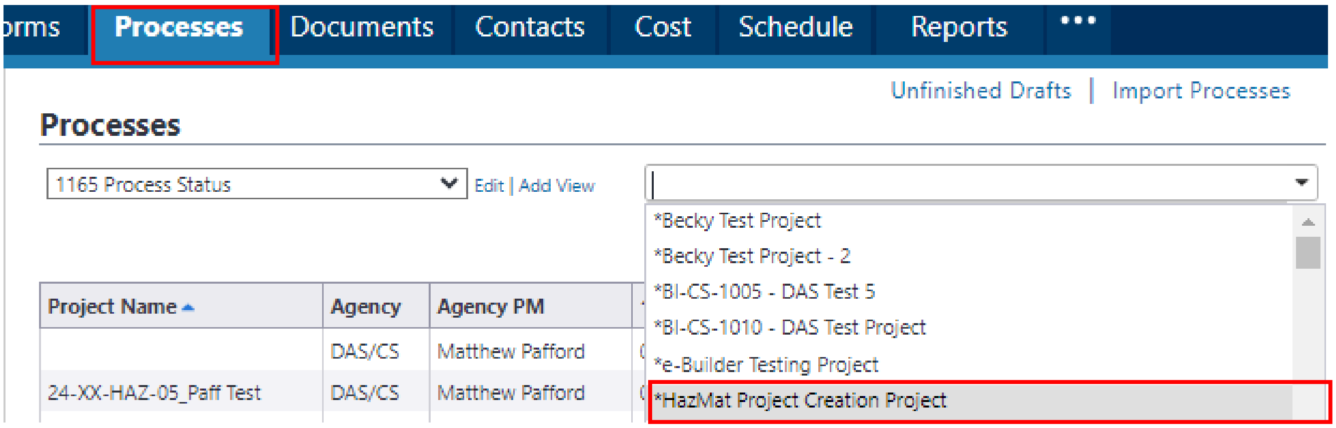
11D.01 (Coming Soon)

Section 12: 1165 HazMat Project Intake Request

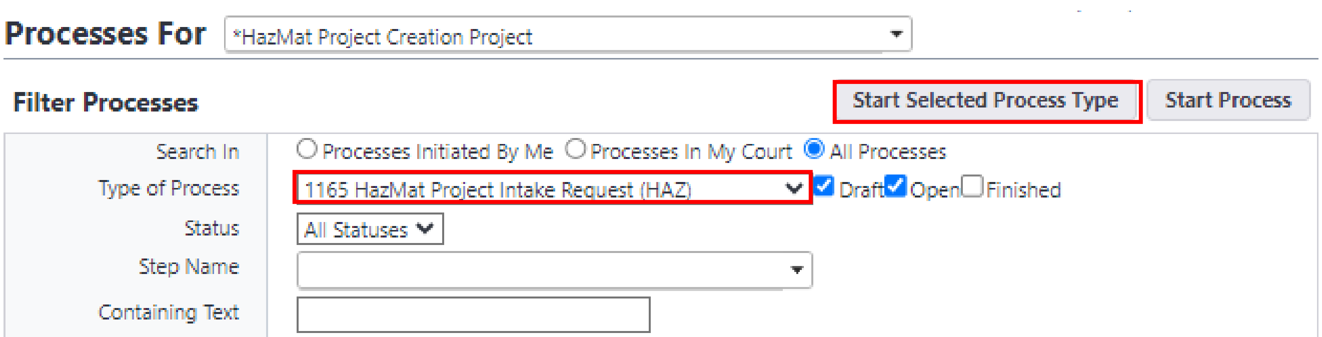
12.01 Accessing the Process

Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f

On your homepage, Go to the “Processes” tab and select the “*HazMat Project Creation Project” from the “All Projects” dropdown list.

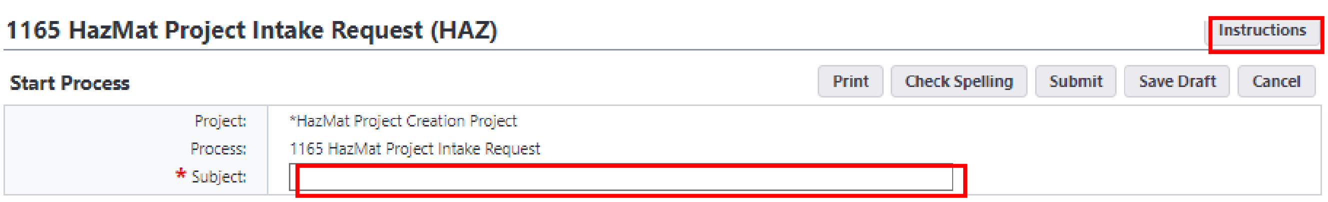


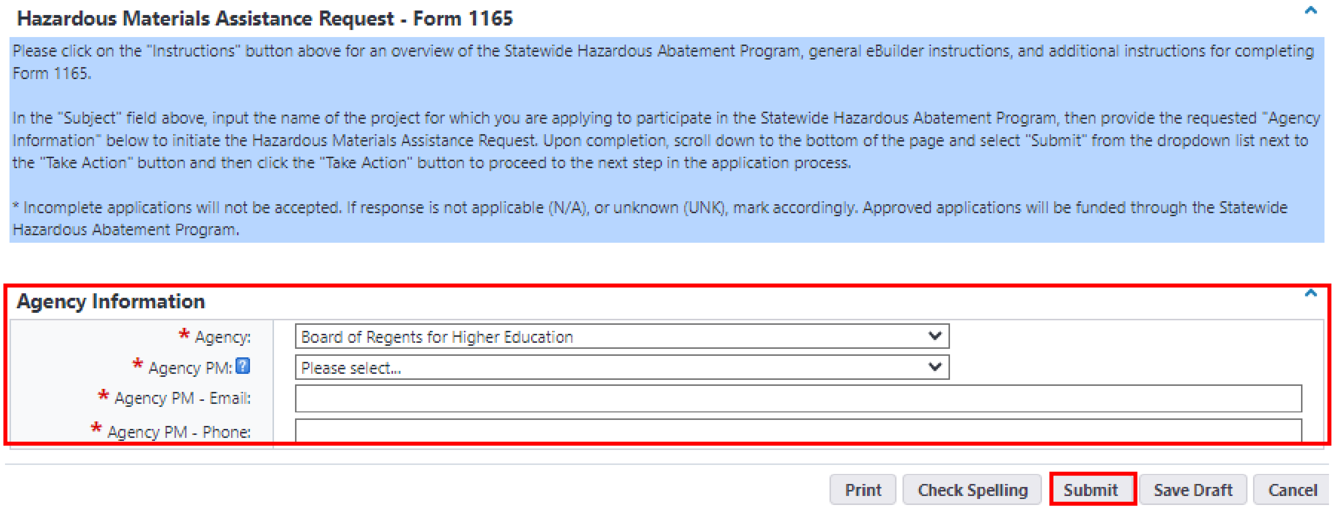
Click the “Start Selected Process Type” button. The Type of Process should be listed as “1165 HazMat Project Intake Request (HAZ)”.



12.02 Hazardous Materials Assistance Request (Agency PM)

Click the “Instructions” button at the top of the page for an overview of the Statewide Hazardous Abatement Program, general eBuilder instructions, and additional instructions for completing Form 1165.

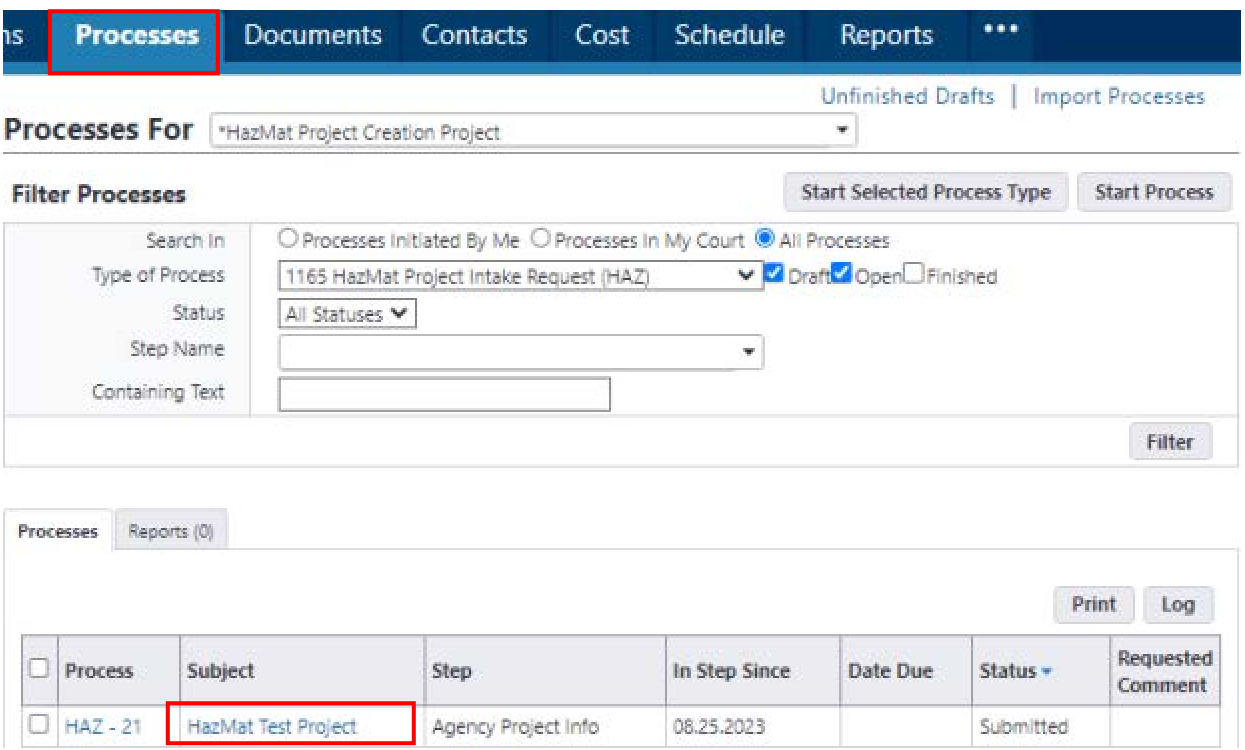




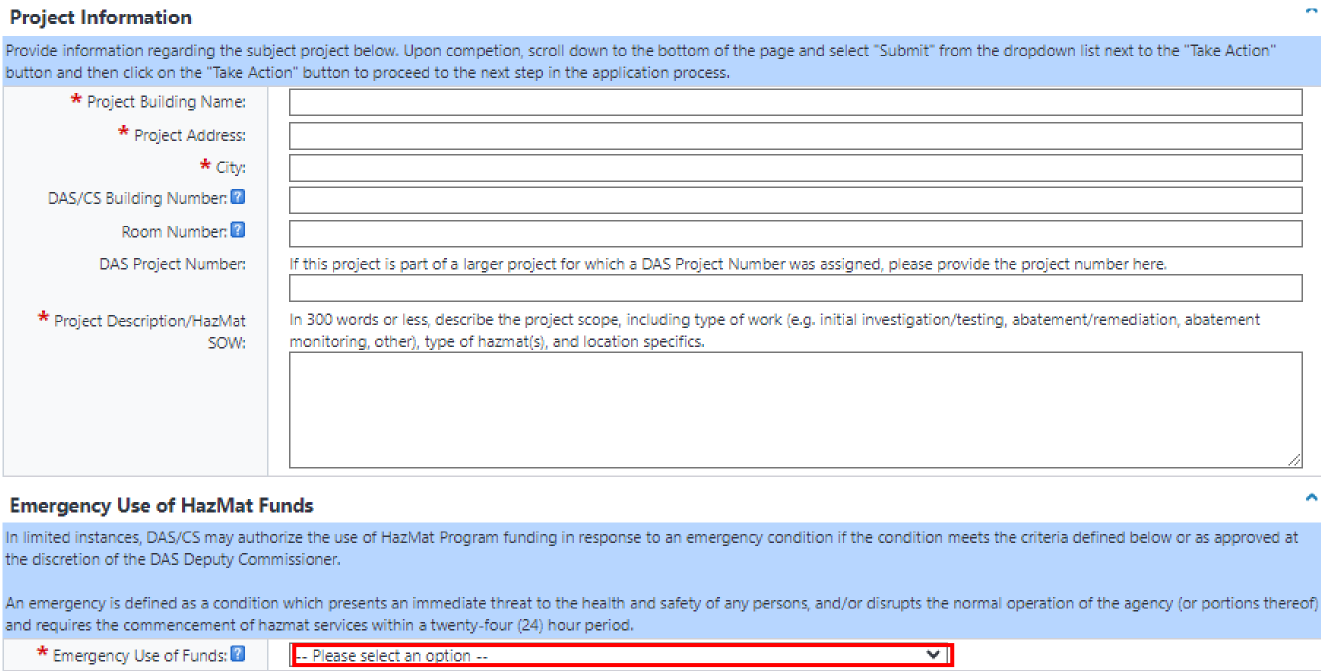
* If the name of the Agency PM is not listed in the dropdown list, please notify Craig Russell by email at craig.russell@ct.gov to have that individual added to the list and provide that individual with an eBuilder license, username, and password.

12.03 HazMat Project Information (Agency PM)

Return to the “Processes” tab and click on the link for the subject project in the “Subject” column.



Review the general instructions for and complete the sections entitled “Project Information” and “Emergency Use of HazMat Funds”.


Project Information

Provide information regarding the subject project below. Upon competion, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and then click on the "Take Action" button to proceed to the next step in the application process.

* Project Building Name:	
* Project Address:	
* City:	
DAS/CS Building Number:	
Room Number:	
DAS Project Number:	If this project is part of a larger project for which a DAS Project Number was assigned, please provide the project number here.
* Project Description/HazMat SOW:	In 300 words or less, describe the project scope, including type of work (e.g. initial investigation/testing, abatement/remediation, abatement monitoring, other), type of hazmat(s), and location specifics.

Emergency Use of HazMat Funds

In limited instances, DAS/CS may authorize the use of HazMat Program funding in response to an emergency condition if the condition meets the criteria defined below or as approved at the discretion of the DAS Deputy Commissioner.

An emergency is defined as a condition which presents an immediate threat to the health and safety of any persons, and/or disrupts the normal operation of the agency (or portions thereof) and requires the commencement of hazmat services within a twenty-four (24) hour period.

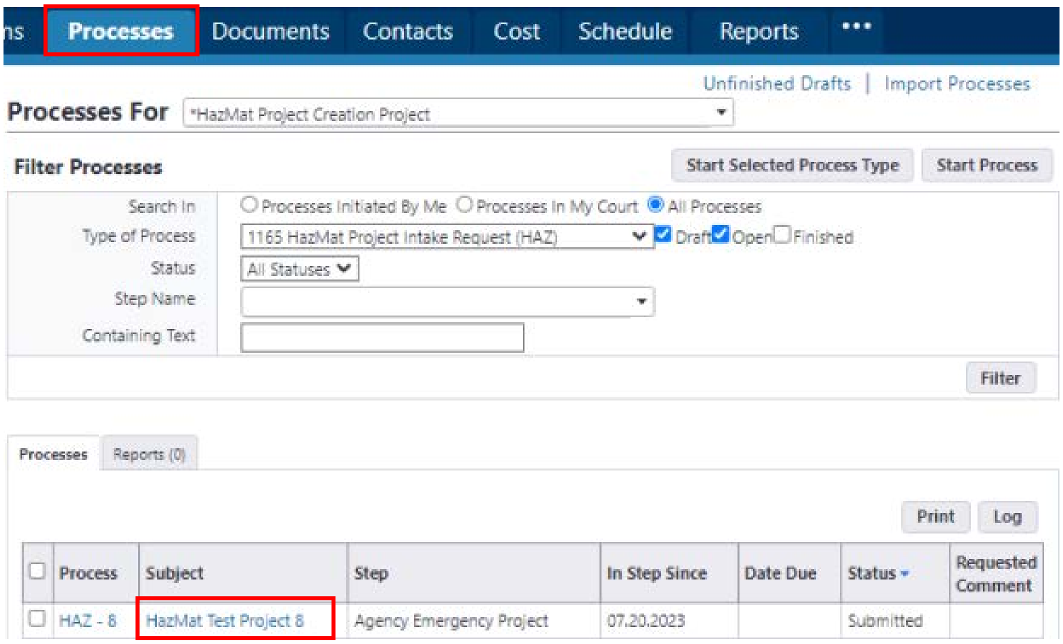
* Emergency Use of Funds:	-- Please select an option --

- ∗ Only answer “Yes” to the “**Emergency Use of Funds**” question if the subject project presents a condition that is an immediate threat to the health and safety of any persons, and/or disrupts the normal operation of the agency (or portions thereof) and requires the commencement of hazmat services within a twenty-four (24) hour period.

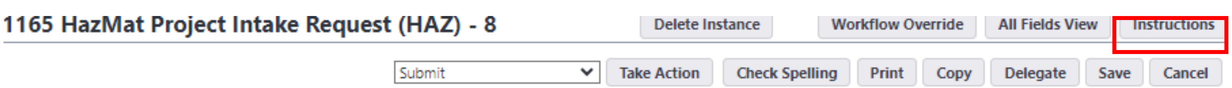
Upon completion, scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and click the “Take Action” button. If you answered “Yes” to the “Emergency Use of Funds” question, proceed to Section 12.04. If you answered “No”, proceed to Section 12.05.

12.04 HazMat Emergency Project (Agency PM)

If the response to the “Emergency Use of Funds” question was “Yes”, return to the “Processes” tab and click on the link for the subject project in the “Subject” column. The “Step” column should denote the subject project as “Agency Emergency Project”.

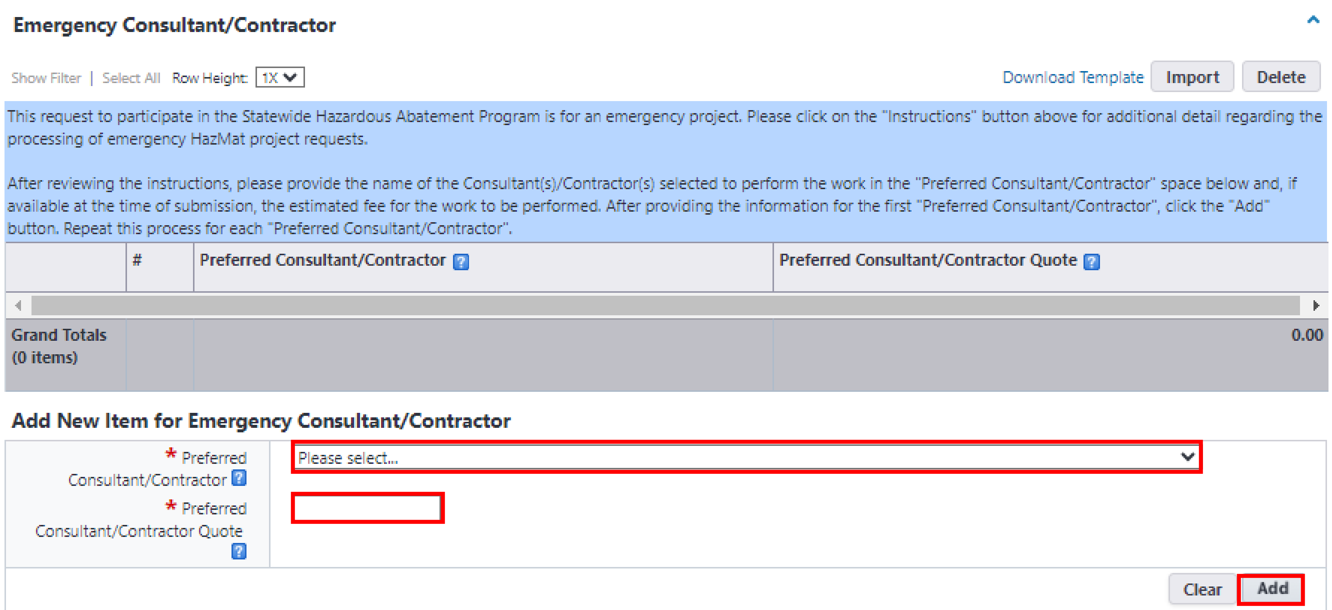


Click the “Instructions” button at the top of the page for an overview of the processing of emergency HazMat project requests.

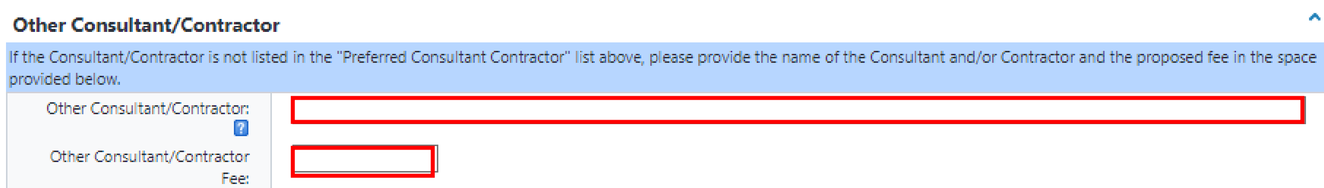


Review the general instructions for and complete the sections entitled “Services Requested”, “Emergency Consultant/Contractor”, “Statement of Verification” and “Terms of Acceptance & Signature”.

To complete the “Emergency Consultant/Contractor” section, scroll down to subsection “Add New Item for Emergency Consultant/Contractor” and select the “Preferred Consultant/Contractor” from the dropdown list provided and provide the “Preferred Consultant/Contractor Quote”. Select “Other” from the dropdown list if your selected Consultant/Contractor is not formally listed. After providing the information for the first Consultant/Contractor, click the “Add” button and repeat this process if applicable.



If “Other” was selected from the “Preferred Consultant/Contractor” dropdown list, then provide the name of the Consultant/Contractor and the proposed fee in the “Other Consultant/Contractor” section.



After adding the Emergency Consultant/Contractor, answer the “Estimated Fee Known” question by selecting “Yes” or “No” from the dropdown list.

- Answer “Yes” if the estimated fee is known for all "Preferred Consultant/Contractor"(s).
- Answer “No” if the estimated fee is unknown for either the Consultant or Contractor and leave the "Preferred Consultant/Contractor Quote" field blank.

  * Please note that if no fee was provided at the time of submission, you will have 24 hours after the work has started to acquire a rough estimate from the Consultant and/or Contractor for the services that are to be provided. sufficient time to assess and gain a better understanding of the emergency project, so that a rough estimate can be provided.

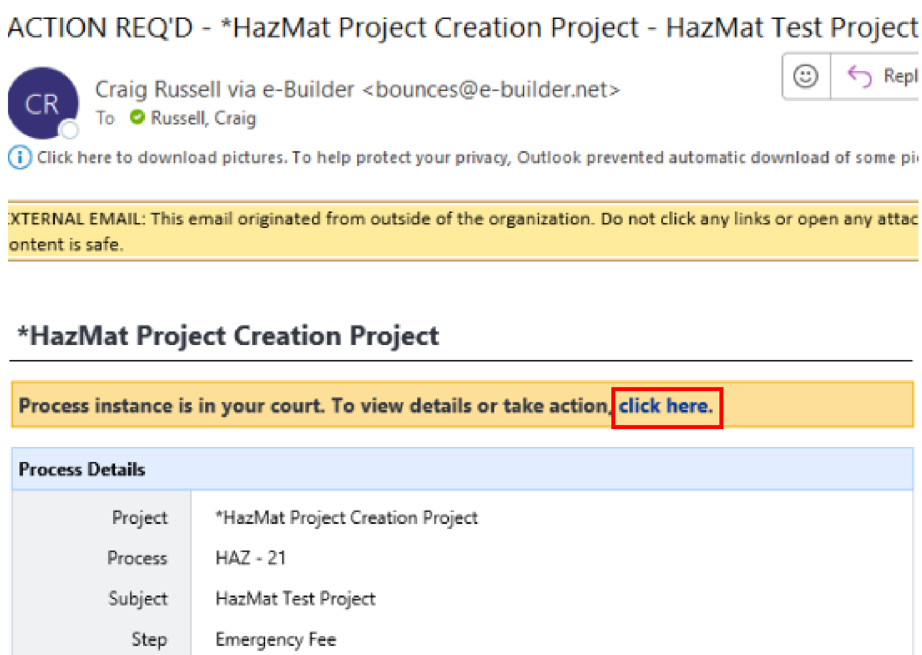
After responding the “Estimated Fee Known?” question, complete the sections entitled “Statement of Verification” and “Terms of Acceptance and Signature”.

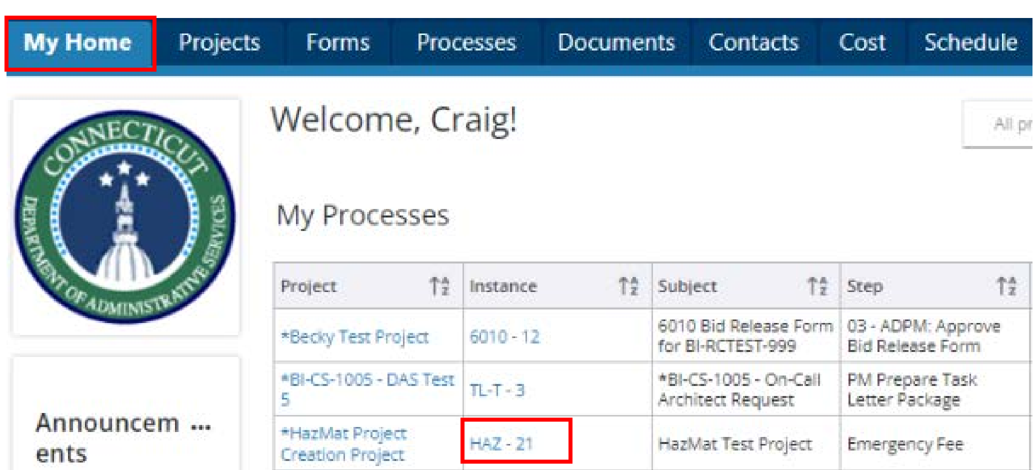
Upon completion of all sections, scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

The Client Agency may begin work immediately after notifying DAS/CS of the emergency project through the submission of Form 1165. Pre-approval is not required to initiate the work on an emergency project.

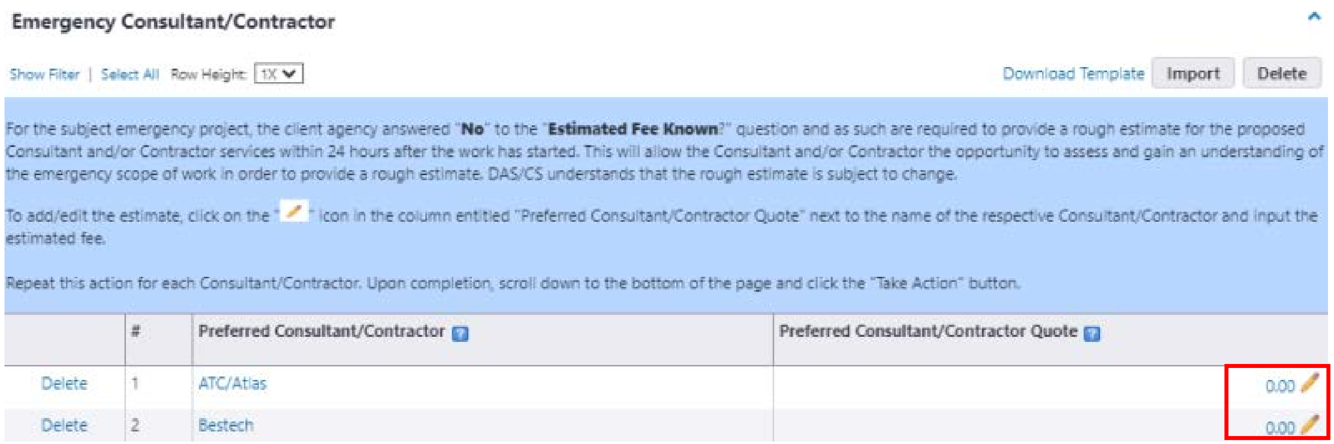
If the client agency answered "No" to the "Estimated Fee Known?" question, then the client agency will receive an email notification through eBuilder that action is required by the client agency to complete the application.

To access the application, the client agency can either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Emergency Fee”.



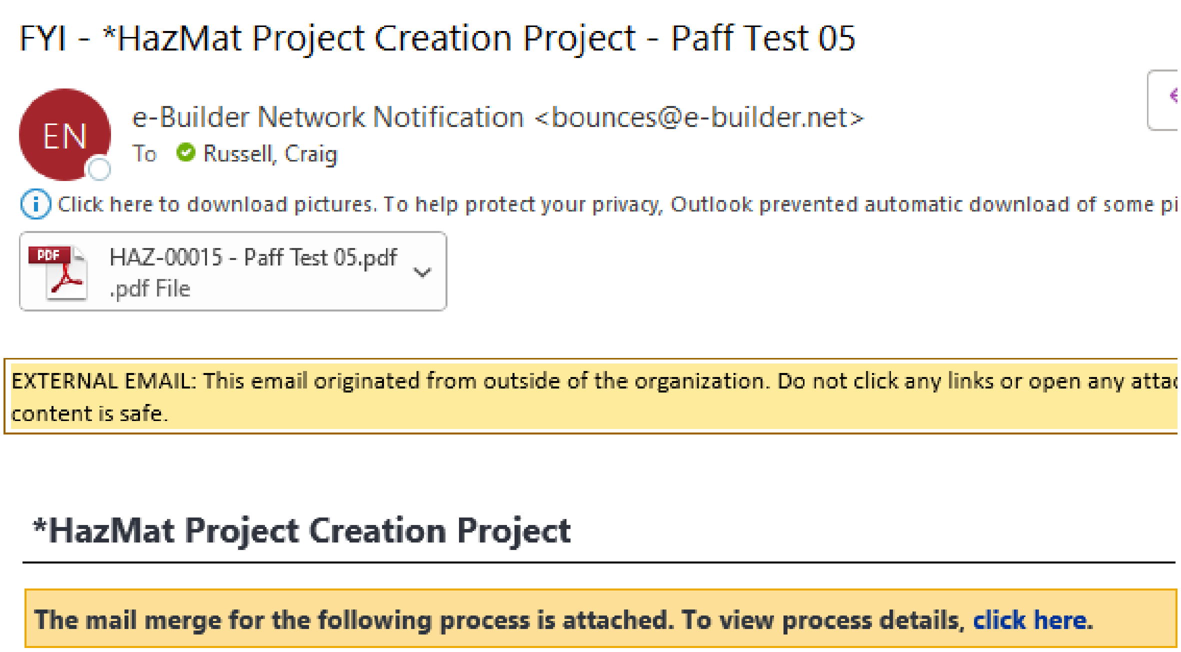


To add the rough estimate, click on the " " icon in the column entitled "Preferred Consultant/Contractor Quote", next to the name of the respective Consultant/Contractor, and input the estimated fee. Repeat this action for each Consultant/Contractor.



Upon completion, scroll down to the bottom of the page and click the "Take Action" button to submit the application to the DAS Supervising Environmental Analyst for review and for sign off on the application.

After the application has been signed and executed, the client agency will receive an email notification from eBuilder with a copy of the executed Form 1165.

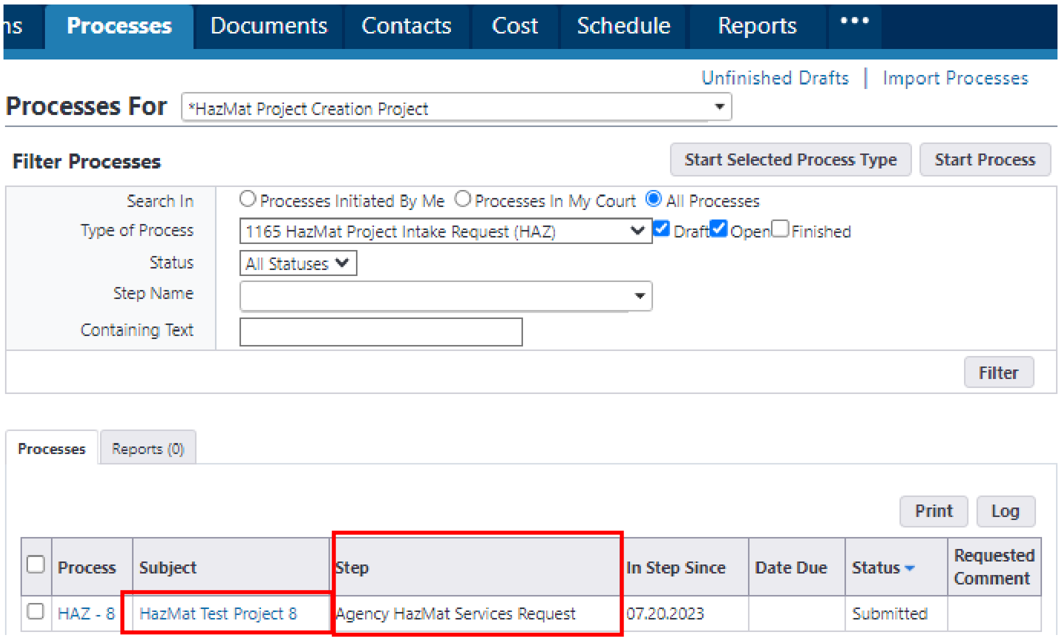


At the conclusion of the emergency project, the consultant/contractor shall provide an itemized invoice for time and materials for services performed, and payment will be made in accordance with the approved rates in the appropriate state contracts. DAS/CS reserves the right to reject payment at the discretion of the DAS Chief Architect.

This concludes the HazMat Application process for emergency projects for the client agency in eBuilder.

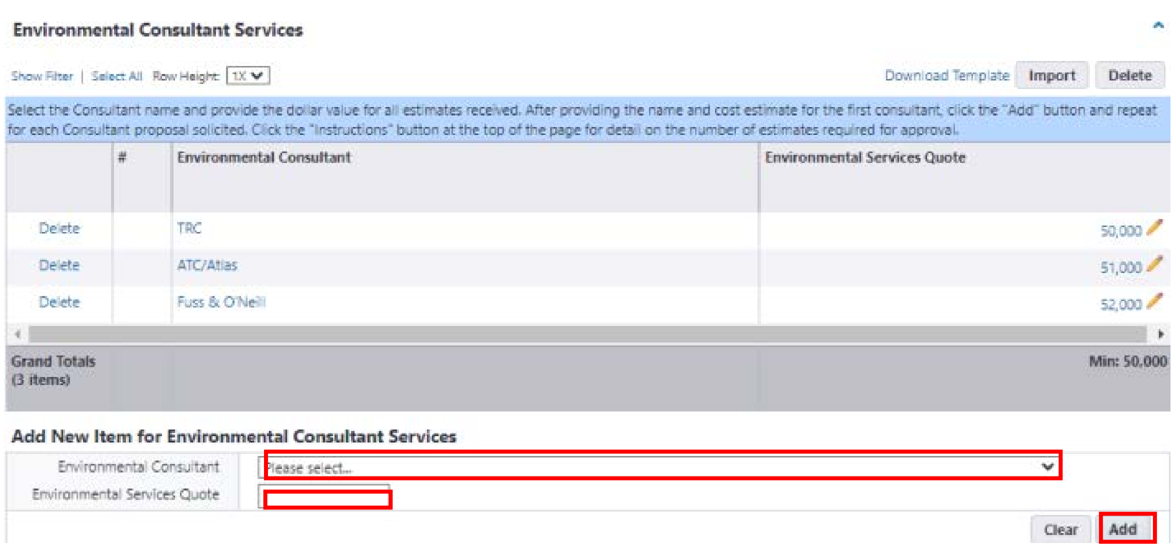
12.05 HazMat Services Requested (Agency PM)

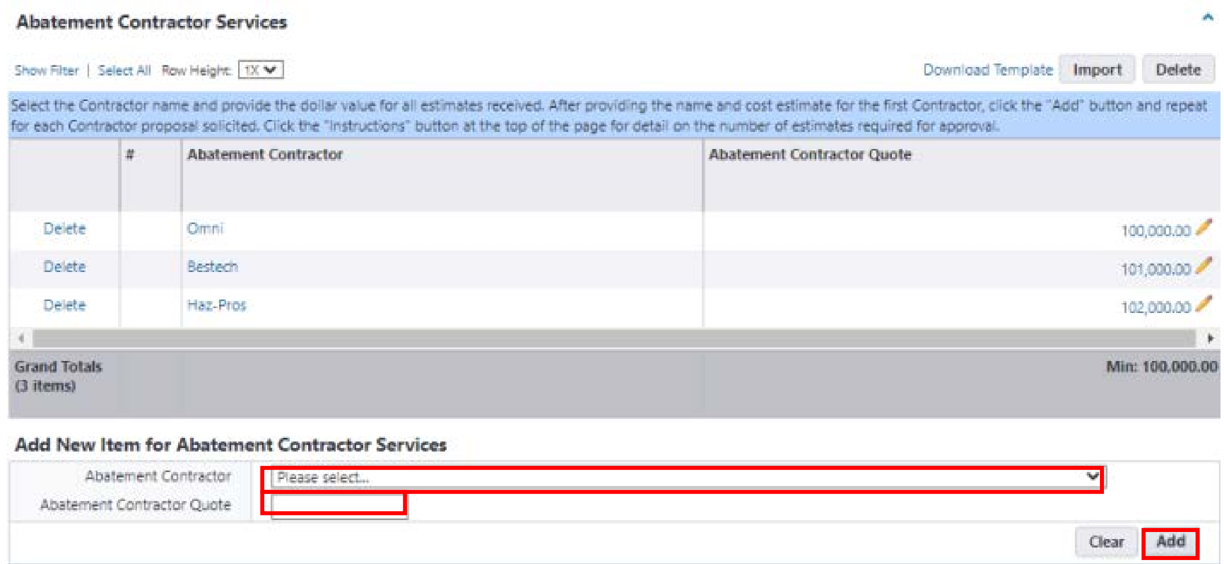
If the response to the “Emergency Use of Funds” question was “No”, return to the “Processes” tab and click on the link for the subject project in the “Subject” column. The “Step” column should denote the subject project as “Agency HazMat Service Request”.



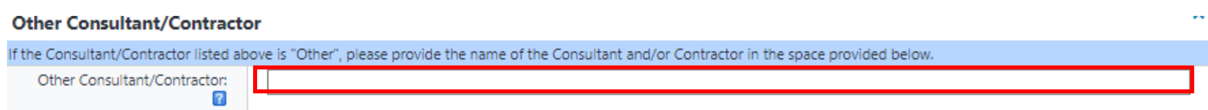
Review the General Instructions for and complete the sections entitled “Services Requested”, “Environmental Consultant Services”, “Abatement Contractor Services”, “Other Consultant/Contractor” - if applicable, “Preferred Consultant/Contractor”, “Service Justification” if applicable, “Work Plans & Cost Estimates”, and “Terms of Acceptance & Signature”.

To complete the “Environmental Consultant Services” and “Abatement Contractor Services” sections, scroll down to the subsection entitled “Add New Item for…” in those respective sections and select one of the “Environmental Consultants” and/or “Abatement Contractors” solicited from the dropdown list and input the “Environmental Services Quote” and/or “Abatement Contractor Quote”. Click the “Add” button and repeat this process for all Consultants/Contractors solicited.

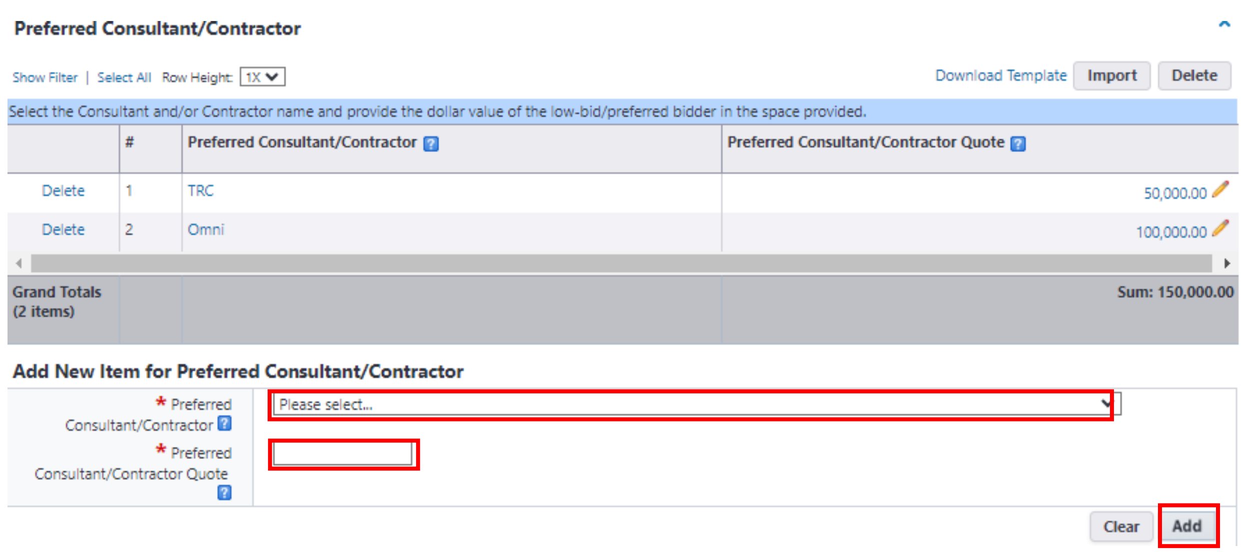




If the Consultant and or Contractor is not in the respective dropdown list, select "Other" from the respective dropdown list and provide the name of said Consultant/Contractor and their proposed fee in the "Other Consultant/Contractor" section.



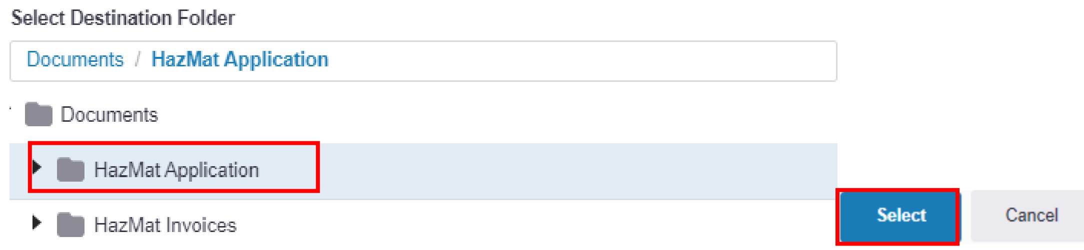
Complete the same steps noted above for the "Preferred Consultant/Contractor" section, adding only the "Preferred Consultant/Contractor" and their respective quotes.



If the "Preferred Consultant/Contractor" is not the low bid, complete the "Service Justification" section.

Review the instructions and complete the "Work Plans & Cost Estimates" section. After reviewing the instructions, click on the "Documents" tab, and then click the "Attach Documents" button.

Once prompted, select “Upload from your Computer”, click “HazMat Application” as the destination folder and press the “Select” button.



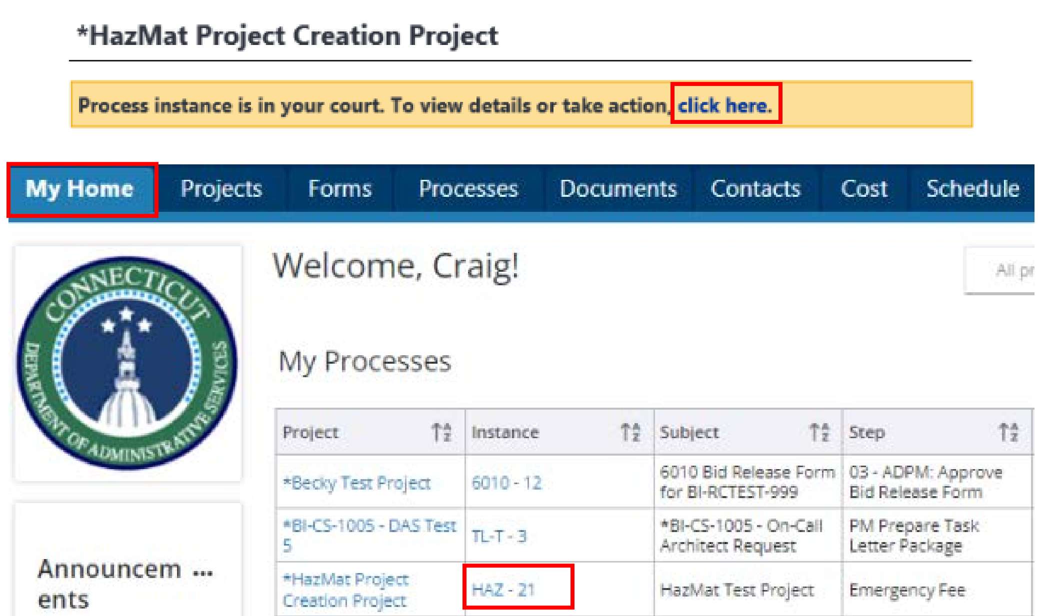
Upload the required documents into the space provided. Please note that the upload process may be delayed.

Upon completion of the upload, click on the “Details” tab to return to the application. Scroll down to the end of the application and complete the section entitled “Terms of Acceptance and Signature”.

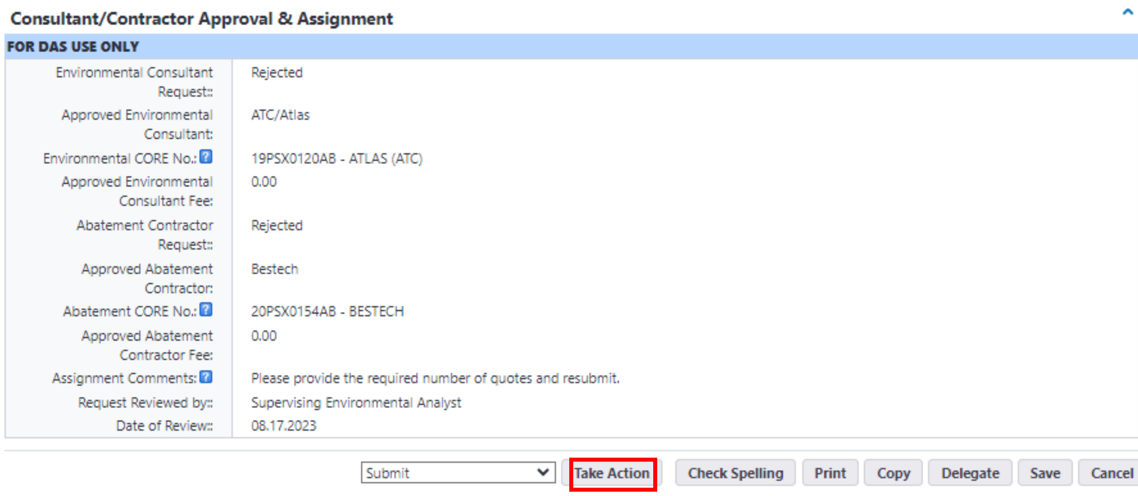
Upon completion of all sections, select “Submit” from the dropdown list next to the “Take Action” button at the bottom of the page, and click the “Take Action” button.

After the Supervising Environmental Analyst reviews the application for approval, the client agency will receive an email notification through eBuilder that either the application will need to be revised to be considered for approval, or the request has been approved and assigned.

To access the application after the Environmental Analyst has completed his review, the client agency can either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Agency Project Info”.



After opening the application in eBuilder, scroll down to the bottom of the page and review the section entitled "Consultant/Contractor Approval and Assignment".



Consultant/Contractor Approval & Assignment

FOR DAS USE ONLY	
Environmental Consultant Request::	Rejected
Approved Environmental Consultant:	ATC/Atlas
Environmental CORE No.:	19PSX0120AB - ATLAS (ATC)
Approved Environmental Consultant Fee:	0.00
Abatement Contractor Request::	Rejected
Approved Abatement Contractor:	Bestech
Abatement CORE No.:	20PSX0154AB - BESTECH
Approved Abatement Contractor Fee:	0.00
Assignment Comments:	Please provide the required number of quotes and resubmit.
Request Reviewed by::	Supervising Environmental Analyst
Date of Review::	08.17.2023

Submit | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

If the application was rejected, the field entitled "Assignment Comments" will provide the reason for rejection and instructions for corrective action, if applicable.

After reviewing the "Assignment Comments", revise the application in accordance with the comments. Upon completion, scroll down to the bottom of the page and click the "Take Action" button to resubmit your application.

If the application was approved, follow the same process noted above to access the application. After opening the application in eBuilder, scroll down to the bottom of the page to the section entitled "Consultant/Contractor Approval and Assignment" and review the field entitled "Assignment Comments". This will serve as the notification to the client agency and the assigned consultant/contractor that the application has been approved and the Supervising Environmental Analyst will follow up with the respective parties to schedule a scope review meeting.

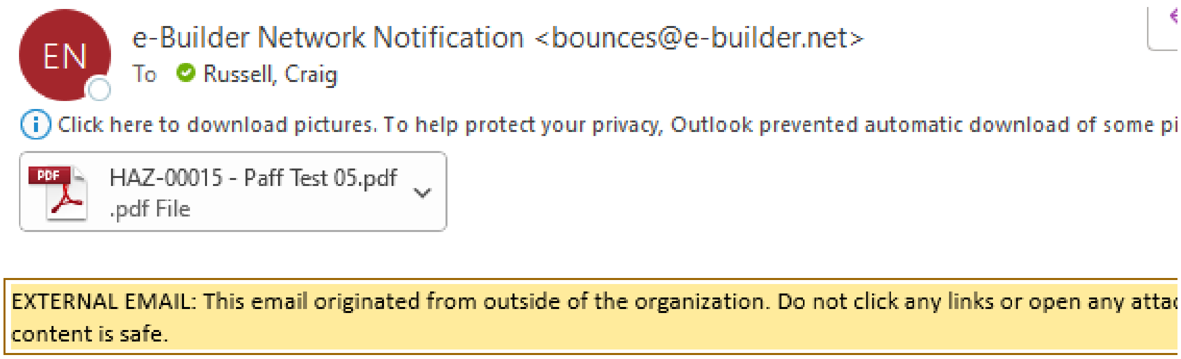
The process is similar for the recommendation of the Notice to Proceed.

After the Supervising Environmental Analyst provides a recommendation for the Notice to Proceed, the client agency will receive an email notification through eBuilder that either the application has been submitted to the DAS Authorized Authority for signature or that the application will need to be revised before it can be considered for recommendation.

If the application is rejected, the client agency should access the application by either clicking on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the "*HazMat Project Creation Project" from the "My Processes" section. The "Step" column should read "Agency Project Info" (see sample diagrams above for illustrations regarding accessing the application). After opening the application in eBuilder, scroll down to the bottom of the page and review the section entitled "Notice to Proceed Recommendation" and refer to the field entitled "Notice to Proceed Comments" for an explanation of rejection and instructions for corrective action, if applicable.

After reviewing the “Notice to Proceed Comments”, revise the application in accordance with the comments. Upon completion, scroll down to the bottom of the page and click the “Take Action” button to resubmit your application.

If the application is recommended for a Notice to Proceed, the application will be forwarded to the DAS Authorized Authority to sign-off on the project. After the application has been signed and executed, the client agency will receive an email notification from eBuilder with a copy of the executed Form 1165.

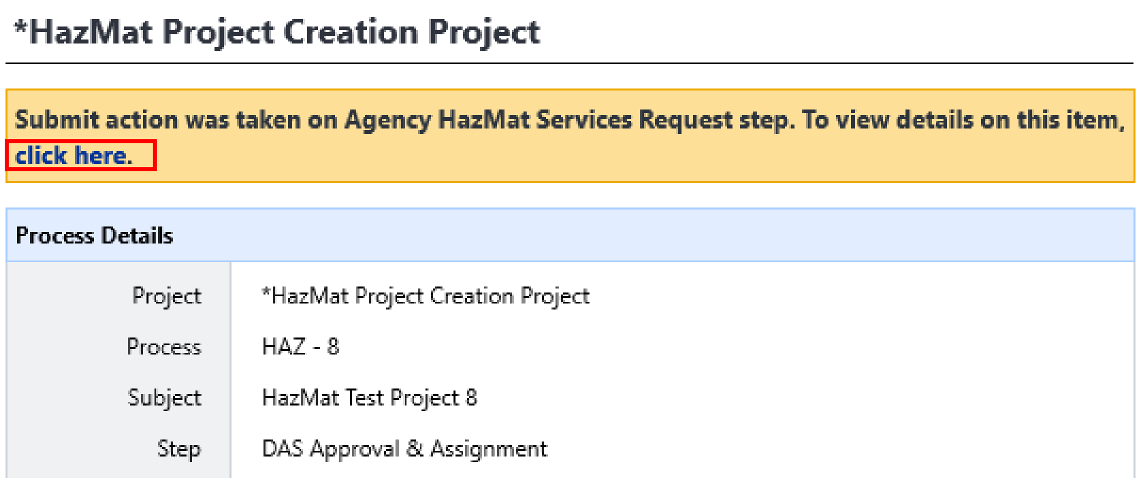


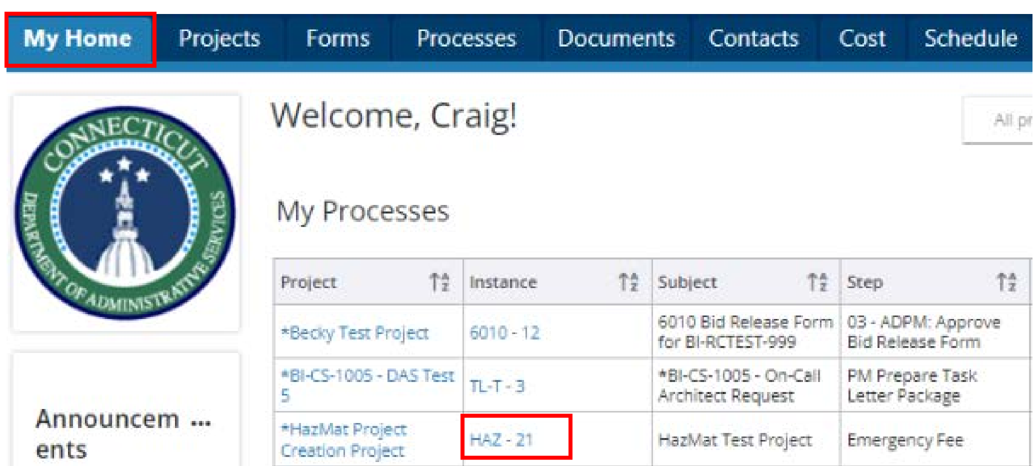
This concludes the HazMat Application process for the client agency in eBuilder.

12.06 DAS Approval & Assignment (Environmental Analyst – DAS Only)

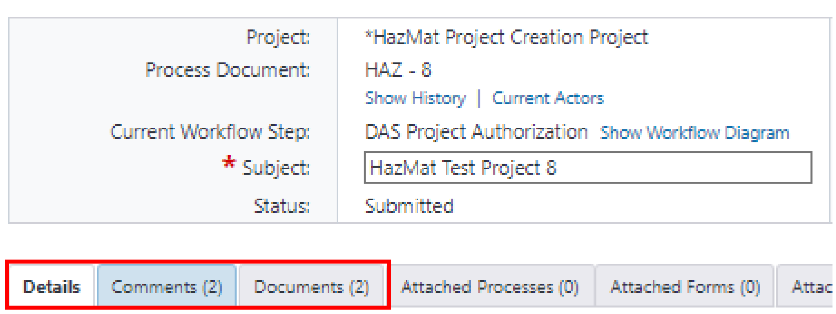
The Environmental Analyst will receive an email from eBuilder as notification that the HazMat Assistance Request has been submitted for DAS Approval and Assignment.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the "*HazMat Project Creation Project" from the "My Processes" section. The "Step" column should read "DAS Approval & Assignment".

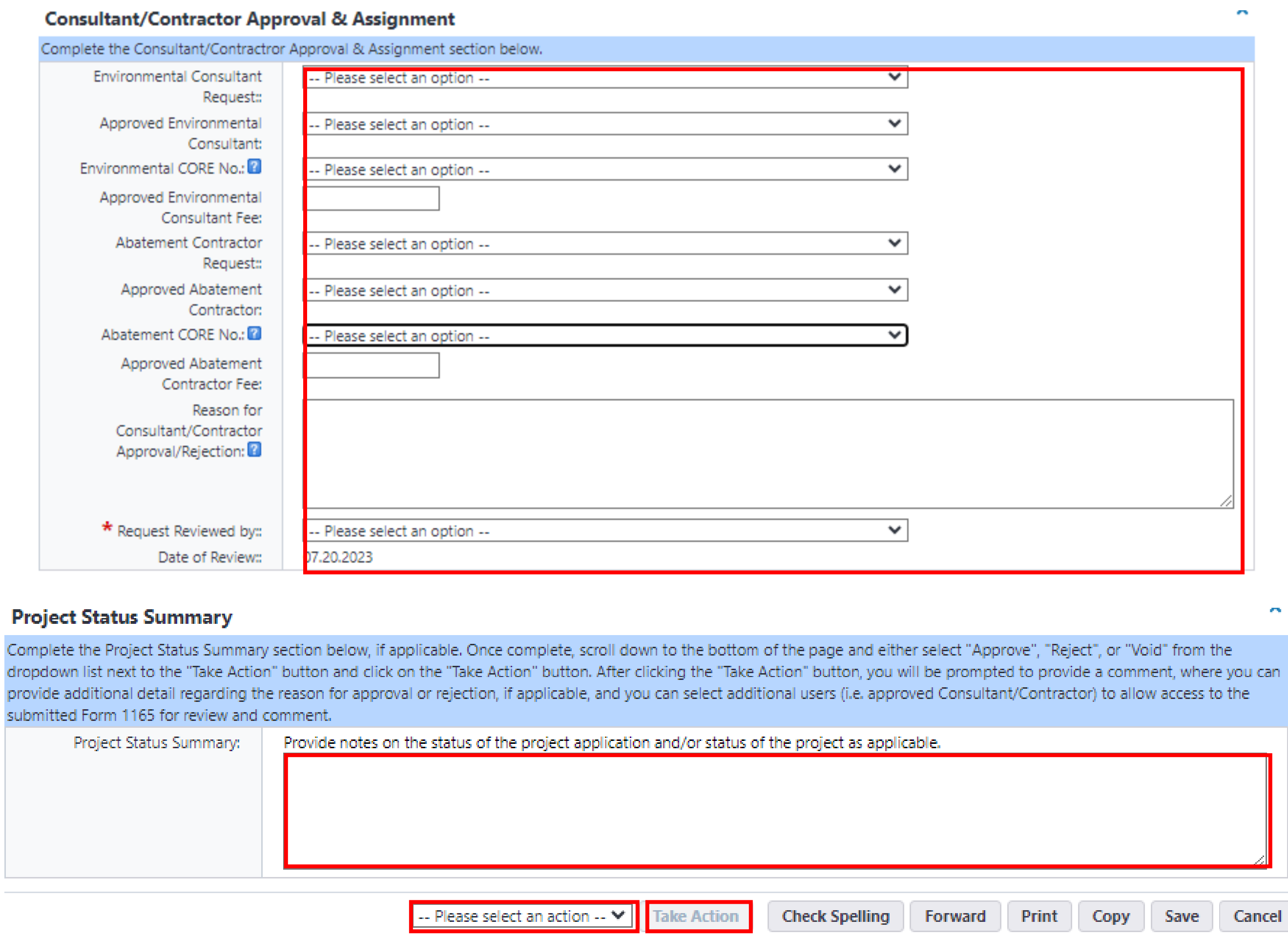




Review the application submission under the "Details" tab. To review any comments provided on the application submission, click on the "Comments" tab. To review any supporting documents submitted with the application, click on the "Documents" tab.

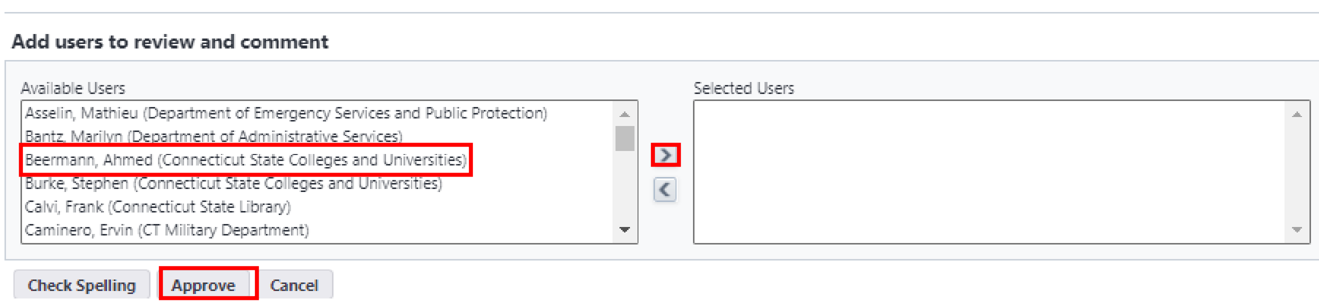


After reviewing the application submission, scroll down to the sections entitled “Consultant/Contractor Approval & Assignment” and “Project Status Summary”, review the general instructions for and complete those sections.



Upon completion of all sections, scroll down to the bottom of the page and select either “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

If “Approve” was selected, you will be prompted to “Add users for review and comment”, which will allow access to the submitted Form 1165 to those selected users for review and comment. Select the approved consultant/contractor from the list of “Available Users” to grant them access to review the application and receive notification that a scope review meeting is to be scheduled.



If “Reject” was selected, Form 1165 will be returned to the client agency for revision, if applicable.

12.07 Emergency Assignment/NTP (Environmental Analyst – DAS Only)

The Environmental Analyst will receive an email from eBuilder as notification that an Emergency HazMat Assistance Request has been submitted for DAS Review and Processing.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Emergency Assignment/NTP”. Please refer to the diagrams in Section 12.0.6 DAS Approval & Assignment for a visual representation on accessing the process.

Review the general instructions and complete the “Emergency Assignment”, “Notice to Proceed Recommendation”, and ”Project Status Summary” sections.

When completing the “Emergency Assignment” section (*see diagram on the next page*):

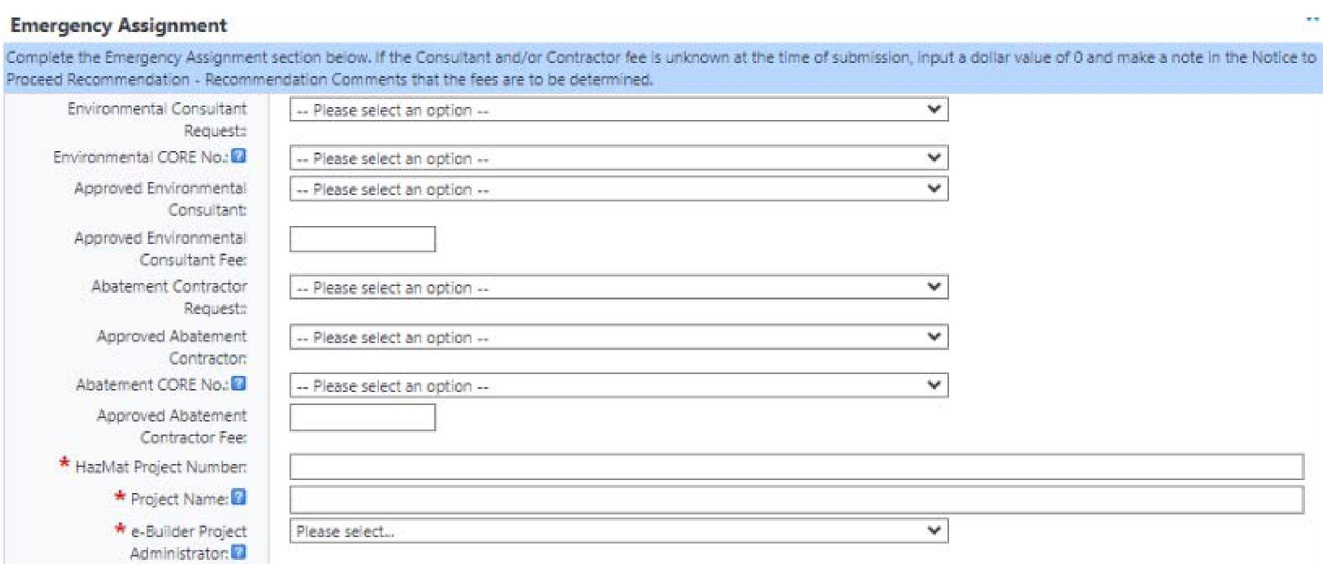
a) Select “Emergency” from the dropdown list for the fields entitled “Environmental Consultant Request” and “Abatement Contractor Request”;

b) Input the names and quotes provided by the client agency from the “Preferred Consultant/Contractor” section into the respective “*Approved*” consultant, contractor and fee fields.

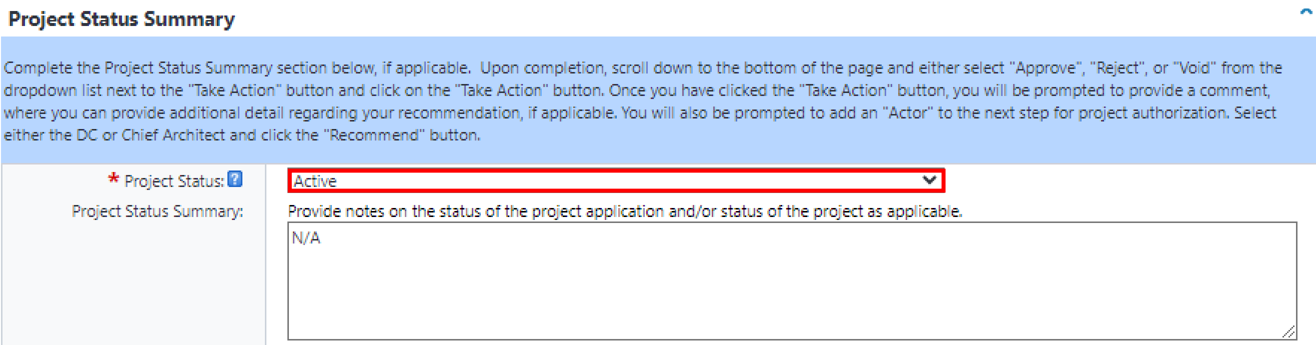
c) The “Project Name” field should consist of the following: “HazMat Project Number – HazMat Project Name” as listed under “Subject” at the top of the page, i.e. 24-CSCU-HAZ-01 - HazMat Test Project 8.

d) Select Craig Russell as the “eBuilder Project Administrator”.

Select Matthew Pafford as the “Project Manager” of the HazMat Program.



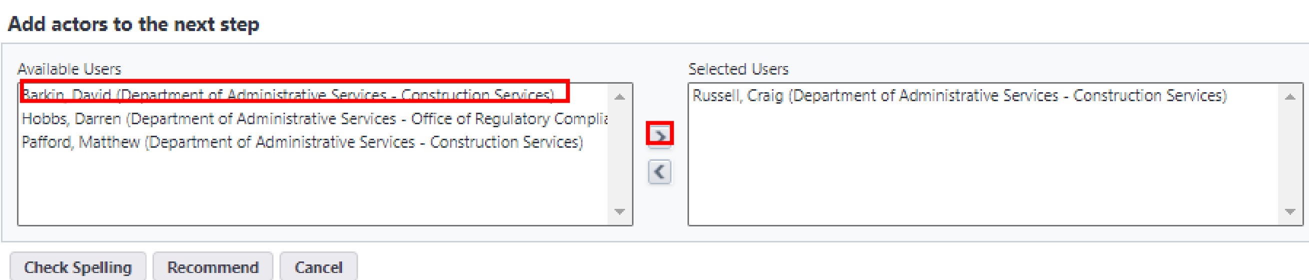
When completing the “Project Status Summary” section, select “Active” from the dropdown list for “Project Status”.



Upon completion of all sections, scroll down to the bottom of the page and select “Recommend” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

After clicking the “Take Action” button, you will be prompted to “Add actors to the next step”, which will direct the application to the Authorized Authority to sign off on the approval of the application; and to “Add users to review and comment”, which will allow selected users access to the submitted Form 1165 for review and comment.

To add an actor to act as the Authorized Signatory, select the individual’s name from the list of “Available Users” for which you wish to sign off on the application, then click on the “>” to move that individual into “Selected Users”.



Repeat this process to “Add users for review and comment”. Select the “Approved” Consultant and/or Contractor from the list of “Available Users” so that they can receive notification that the application is being processed and to allow them access to the application for review and comment. After adding the actors and users, click the “Recommend” button. Proceed to Section 12.10 Form 1165 Executed.

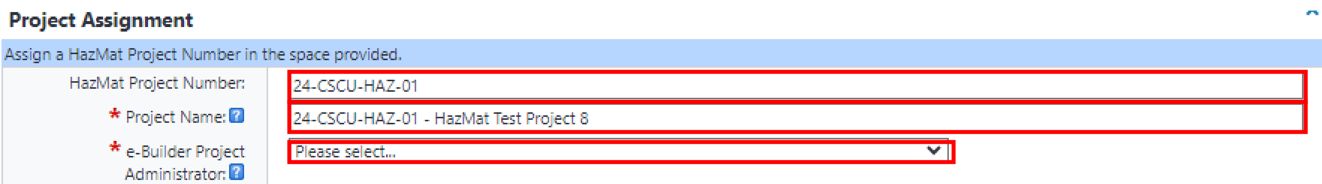
12.08 Scope Review/NTP Recommendation/Project Assignment (EA – DAS Only)

The “Scope Review/NTP/Project Assignment” step should not be completed until after the scope review meeting has been scheduled and completed.

After the scope review meeting, the Environmental Analyst can access the project process by either clicking on the link provided in the aforementioned email or by logging into eBuilder, selecting the “My Home” tab and clicking on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Scope Review/NTP/Project Assignment”. Please refer to the diagrams in Section 12.06 DAS Approval & Assignment for a visual representation on accessing the process.

Review the general instructions and complete the “Scope Review”, “Consultant/Contractor Approval & Assignment”, “Notice to Proceed Recommendation”, “Project Assignment”, and ”Project Status Summary” sections.

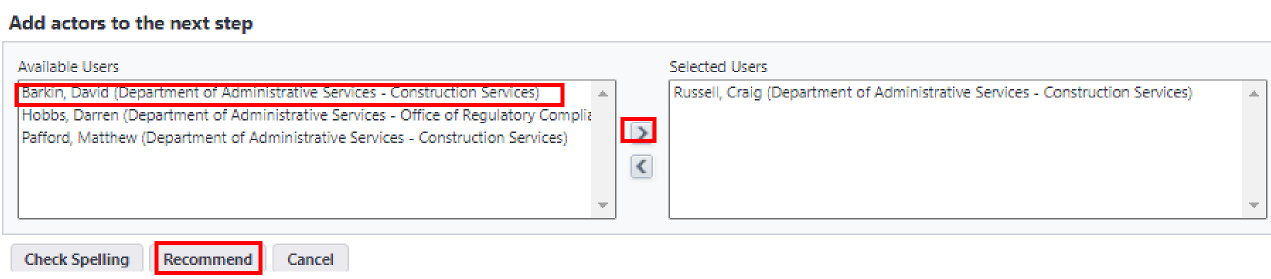
- When completing the “Project Assignment” section, the “Project Name” should consist of the following: “HazMat Project Number – HazMat Project Name” as listed under “Subject” at the top of the page, i.e. 24-CSCU-HAZ-01 - HazMat Test Project 8. Select Craig Russell as the “eBuilder Project Administrator”. Select Matthew Pafford as the “Project Manager” of the HazMat Program.



- When completing the “Project Status Summary” section, select “Active” from the dropdown list for “Project Status”.

If “Recommend” was selected, you will be prompted to “Add actors to the next step”, which will direct the application to the Authorized Authority to sign off on the approval of the application.

To add a user, select the individuals name from the list of “Available Users” for which you wish to sign off on the application, then click on the “>” to move that individual into “Selected Users” and click the “Recommend” button.

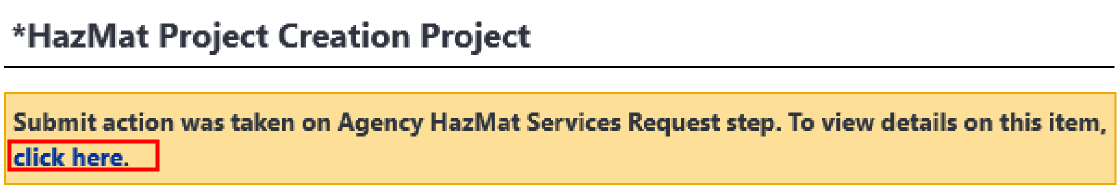


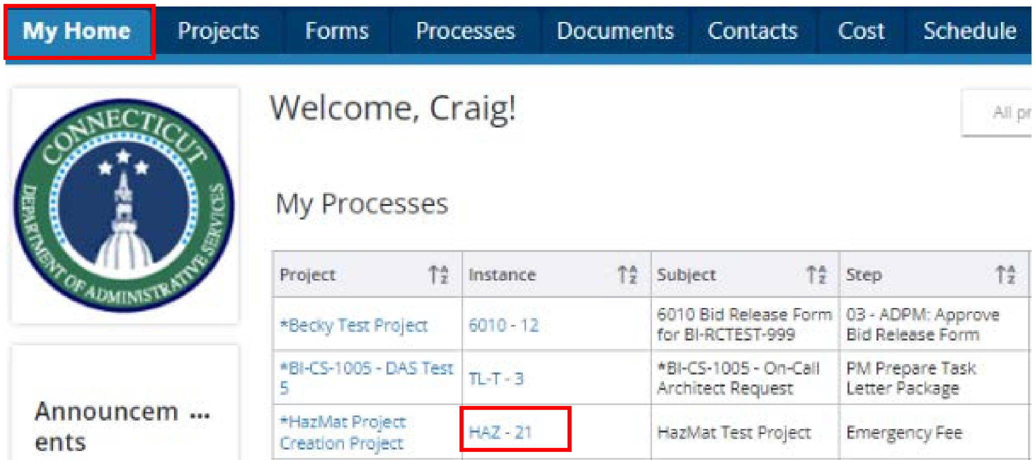
If “Reject” was selected, Form 1165 will be returned to the client agency for revision, if applicable.

12.09 Project Authorization (Chief Architect/Deputy Commissioner – DAS Only)

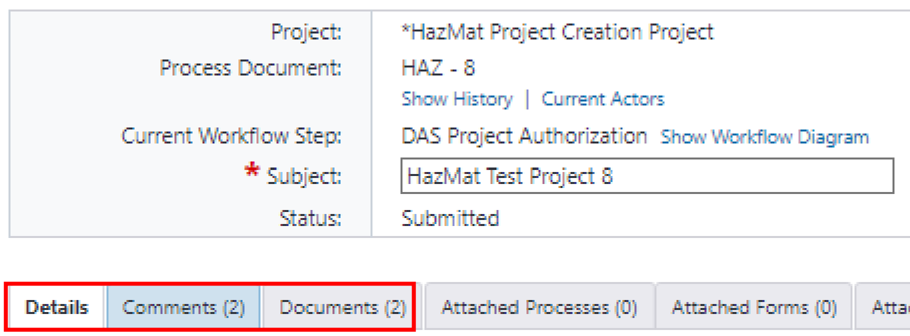
Either the Chief Architect or the Deputy Commissioner will receive an email from eBuilder as notification that the HazMat Assistance Request has been submitted for Project Authorization.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section.

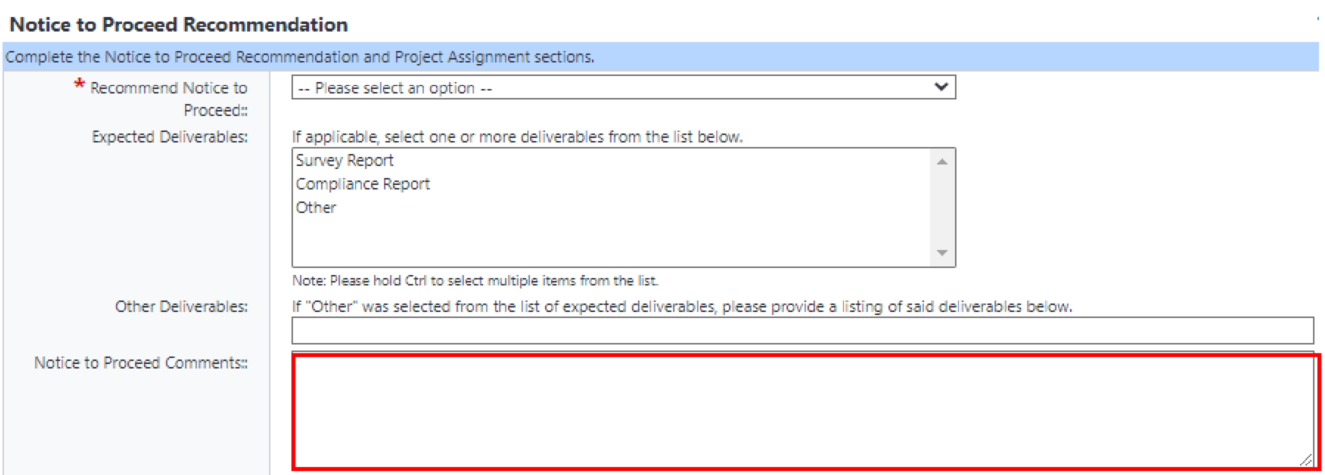




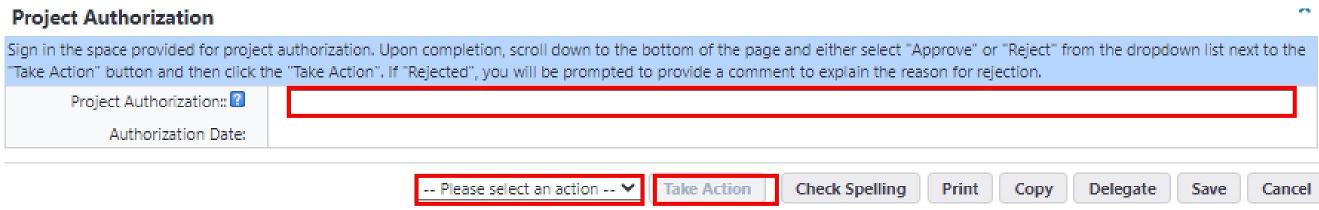
Review the application submission under the “Details” tab. To review any comments provided on the application submission, click on the “Comments” tab. To review any supporting documents submitted with the application, click on the “Documents” tab.



To review comments specific to the “Recommendation for Notice Proceed”, scroll down to the section entitled “Notice to Proceed Recommendation” and refer to the field entitled “Notice to Proceed Comments”.

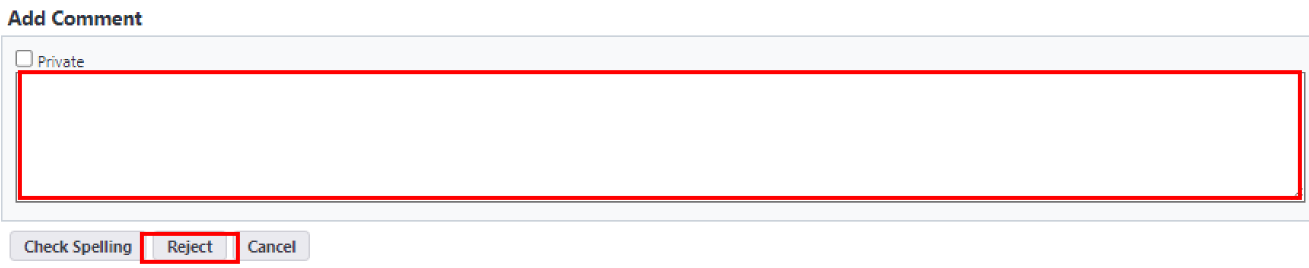


After completing your review of the application submission, scroll down to the section entitled "Project Authorization", review the general instructions for and complete that section.



Upon completion of all sections, scroll down to the bottom of the page and select either "Approve" or "Reject" from the dropdown list next to the "Take Action" button and click the "Take Action" button.

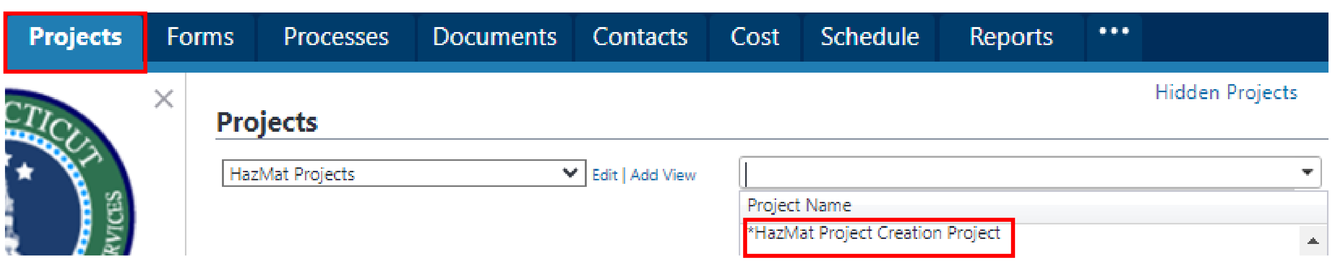
If "Reject" was selected, you will be prompted to provide a comment to explain the reason for rejection and to provide guidance for corrective action. After providing the comment, click the "Reject" button.



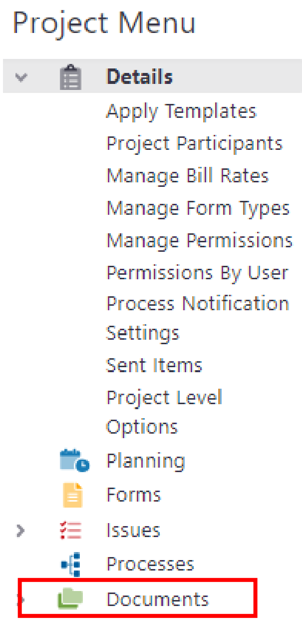
If "Approve" was selected, the application will be finalized, and an email will be distributed through eBuilder to the client agency that includes a copy of the executed Form 1165. The executed Form 1165 will also be uploaded to the eBuilder the subject project "HazMat Application" project file folder.

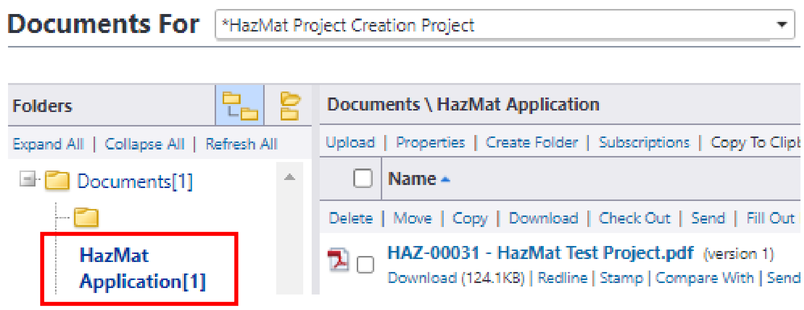
12.10 Project Files (Environmental Analyst – DAS Only)

To access the newly created HazMat Project/HazMat Application file folder, go to the "Projects" tab and select the name of the newly created project from the dropdown list, i.e. 24-CSCU-Hazmat-900 – HazMat Test Project.

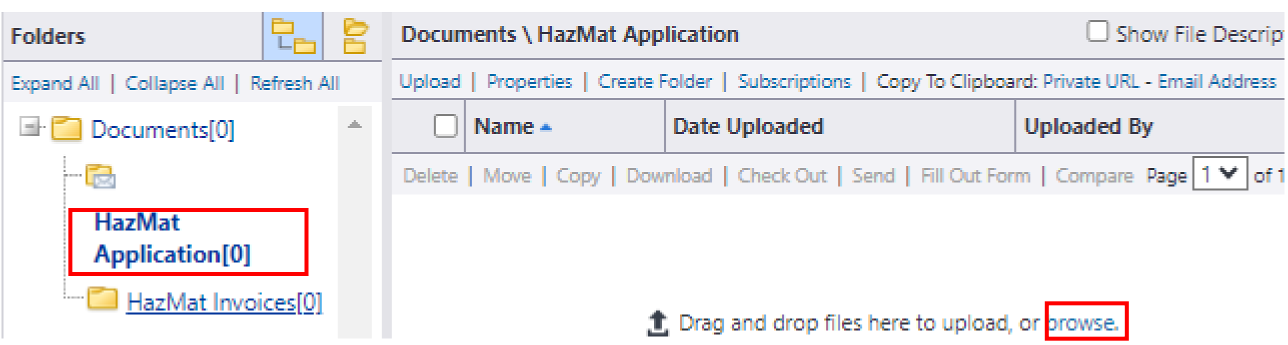


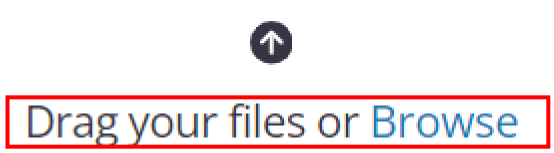
Next, select “Documents” from the “Project Menu” on the lefthand side of your screen. After selecting “Documents”, click on the “HazMat Application” file folder to access the newly executed Form 1165 and any other documents that were uploaded as part of the HazMat Project Intake Process.





If Work Plans and/or Cost Estimates were not uploaded as part of the 1165 Project Intake Process, you should upload them to the “HazMat Application” file folder upon receipt. To upload files, click the “browse” link to open the “Upload” prompt and then either drag and drop the files in the space provided, or click “Browse” to open the file structure on your computer so that you can search for the respective file that you want to upload.





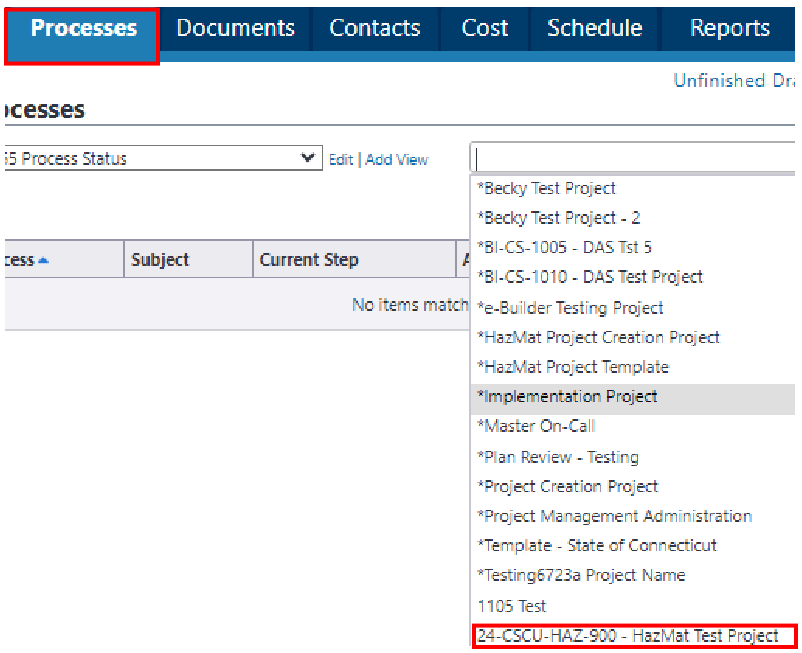
Note that the upload of files may be delayed. The prompt will note when the upload is complete. Upon completion, click “Done”. This concludes the HazMat Project Intake process.

Section 13: HazMat Commitment

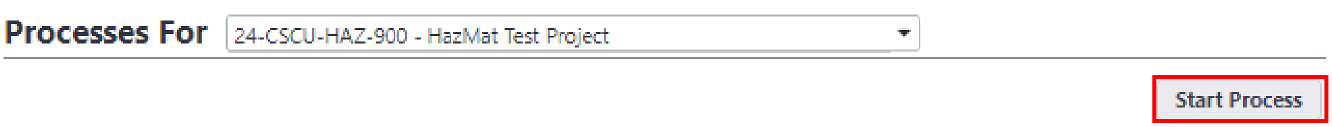
13.01 Accessing the Process

Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f

On your homepage, Go to the "Processes" tab and select the hazmat project number for the project for which you want to make against from the "All Projects" dropdown list.



Click the "Start Process" button and select the "HazMat Commitment" link.



13.02 HazMat Commitment

Read the "General Instructions", fill in the "Subject" field in accordance with the instructions and click the "Submit" button.

After clicking "Submit", you will be returned to the "Processes" tab. Click on the link to the project listed in the "Subject" column.

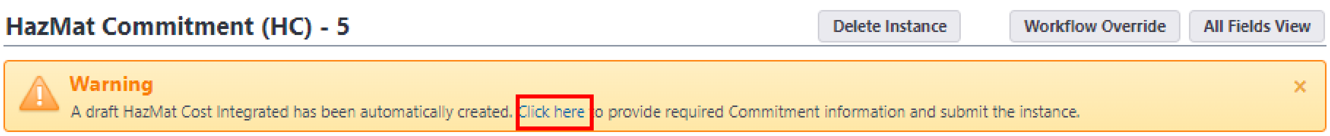
	Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
☐	HC - 4	24-CSCU-HAZ-900 - Environmental & Abatement	Finish	10.02.2023		Submitted	
☐	HC - 5	24-CSCU-HAZ-900 - Environmental & Abatement	HazMat Consultant / Contractor	10.04.2023		Submitted	

Read the “General Instructions”, revise the Consultant/Contractor Information, if applicable, and click the “Take Action” button.

After clicking “Take Action”, you will be returned to the “Processes” tab. Click on the link to the project listed in the “Subject” column again to spawn the cost integration for the commitment process.

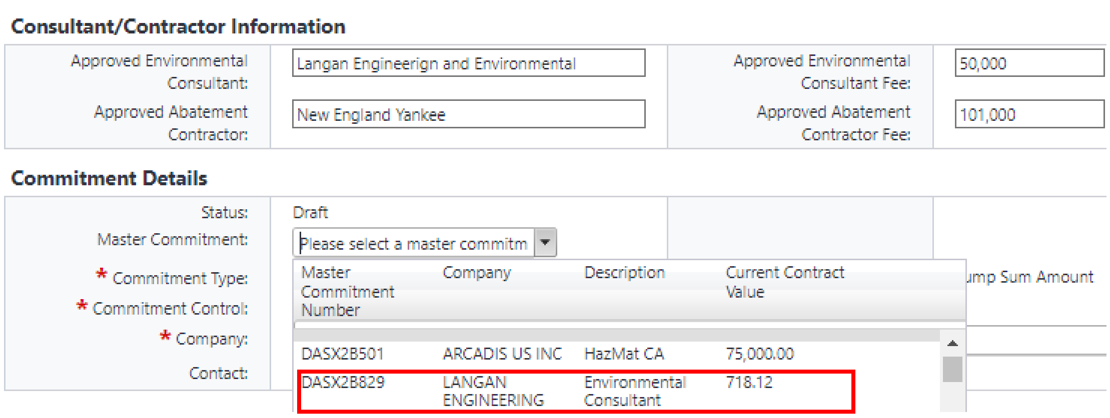
13.03 HazMat Cost Integration

When spawning the commitment process, you will receive a “Warning” notification. Click on the link within the warning notification to access the cost integrated process where you can enter the commitment details for the subject HazMat project.



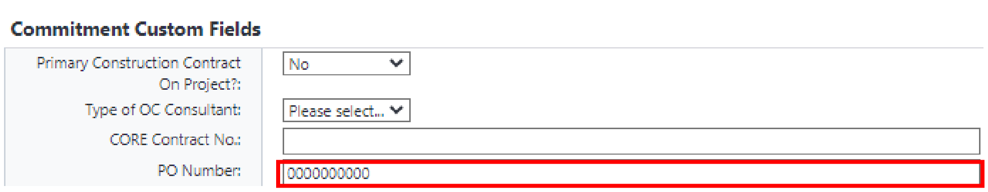
Begin the HazMat Cost Integrated process by completing the “Commitment Details” section. Under “Commitment Details”, go to the “Master Commitment” field and select the Master Commitment Contract, from the dropdown list, for either the “Approved Environmental Consultant” or “Approved Abatement Contractor” listed under the Consultant/Contractor Information section.

* This process will be repeated at a later stage if there are multiple Consultant / Contractor(s) listed within the Consultant/Contractor Information section.



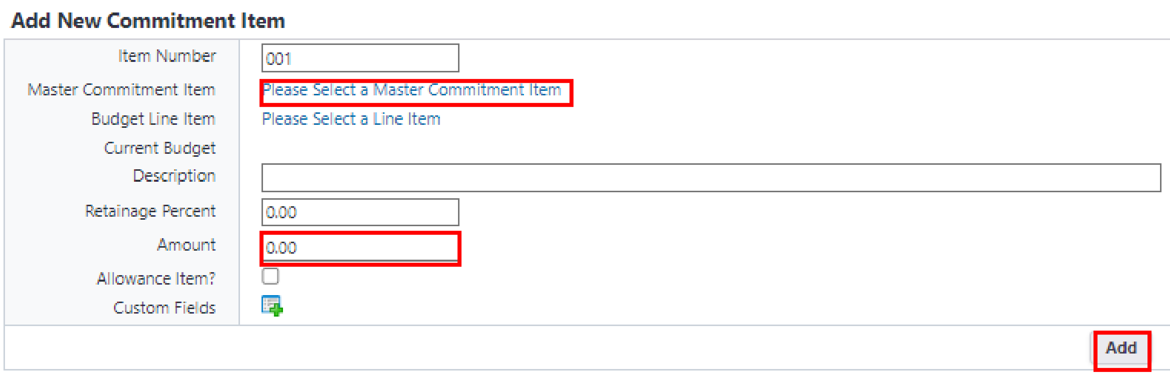
After selecting the Master Commitment Contract, all of the remaining fields in the “Commitment Details” section will infill automatically, but for the “Contact” field for the company. You may leave this field blank, or you may select a contact from the dropdown list. Please note that the contact is specific to the contract, not to the project.

After completing the “Commitment Details” section, scroll down to the “Commitment Custom Fields” section and input the “CORE Contract No.” for the subject Consultant/Contractor and the “PO Number” assigned to the CORE Contract.

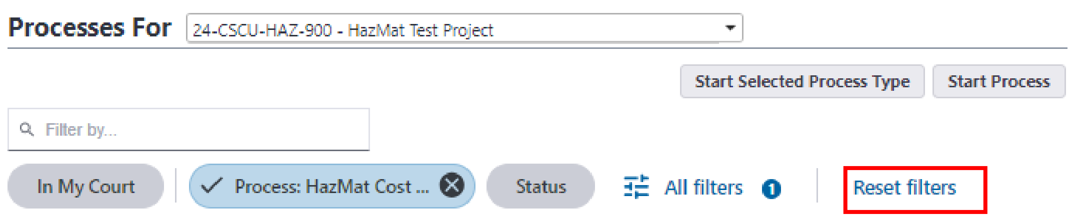


Then, scroll down to the "Add New Commitment Item" section. Click on the link in the "Master Commitment Item" field and then click on the "Item Number" link under "Master Commitment Items".

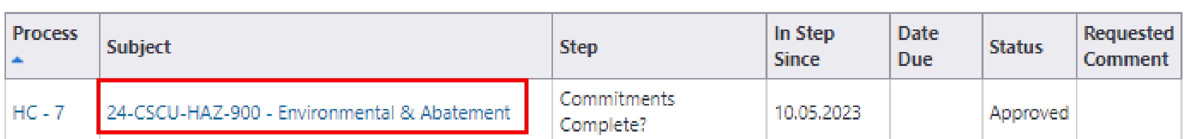
Next, input the dollar amount of the approved fee for the subject Consultant/Contractor in the "Amount" field and click the "Add" button. Upon completion, scroll down to the bottom of the page and click the "Submit" button.



After clicking "Submit", you will be returned to the "Processes" tab. First, click on the "Reset filters" link.

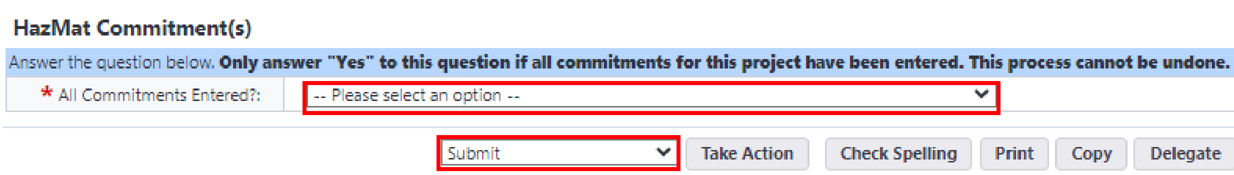


Then, click on the project link in the "Subject" column to return to the HazMat Commitment Process (The "Step" column should read "Commitments Complete?").



Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
HC - 7	24-CSCU-HAZ-900 - Environmental & Abatement	Commitments Complete?	10.05.2023		Approved	

Read the HazMat Commitment(s) instructions, answer the "All Commitments Entered" question and click the "Take Action" button.



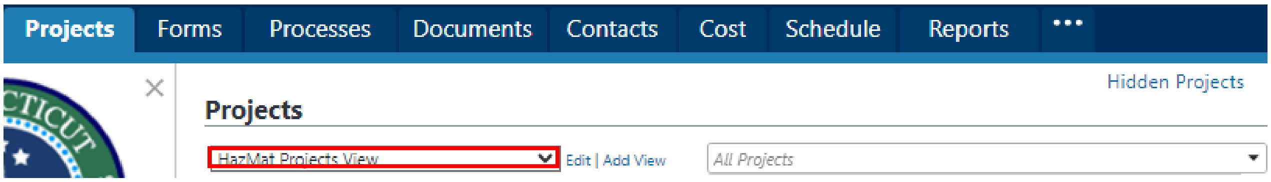
If you answered "No" to the question, you will be returned to the "Processes" tab. Click on the project link under the "Subject" column to spawn the commitment process again (The "Step" column should read "Spawn Commitment") . Repeat Step 13.02 until all commitments have been entered.

	Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
	HC - 7	24-CSCU-HAZ-900 - Environmental & Abatement	Spawn Commitment	10.05.2023		Approved	

If you answered "Yes" to the question, the commitment process will be completed. The commitment status will be marked as "Pending", so that the line item can be adjusted if necessary. The commitment status will need to be "Approved", prior to payment.

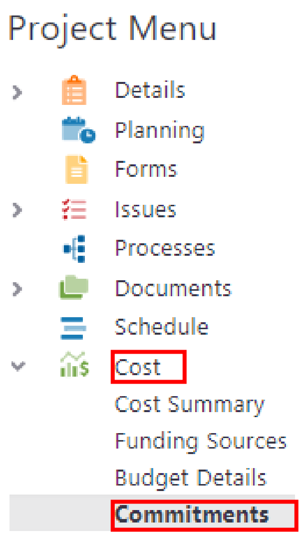
13.04 Edit or Approve a HazMat Commitment

Click on the "Projects" tab and select "HazMat Projects View" from the View dropdown list.

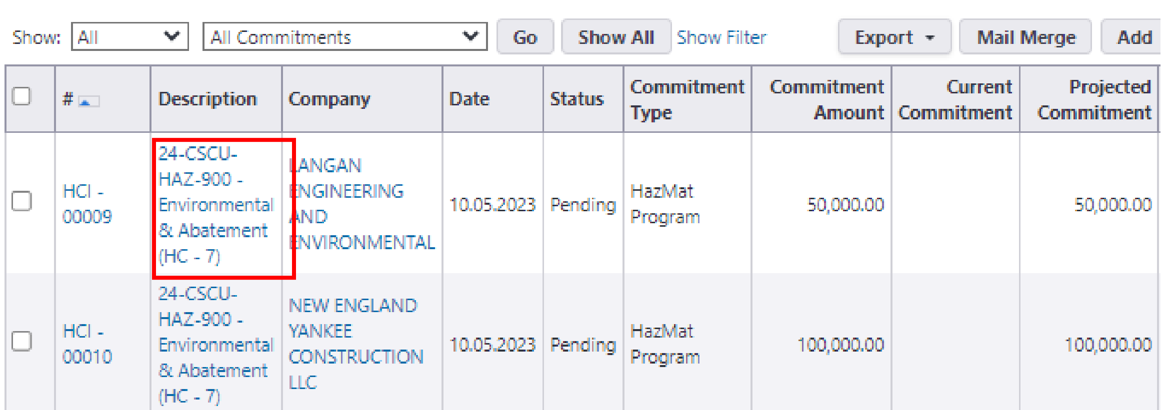


Click on the link in the "Project Name" column to access the HazMat Project Details page.

After opening the HazMat Project Details page, select "Cost" from the "Project Menu" and then select "Commitments" under the Cost dropdown list. This will open the Commitments display page, which will show all commitments related to that project.

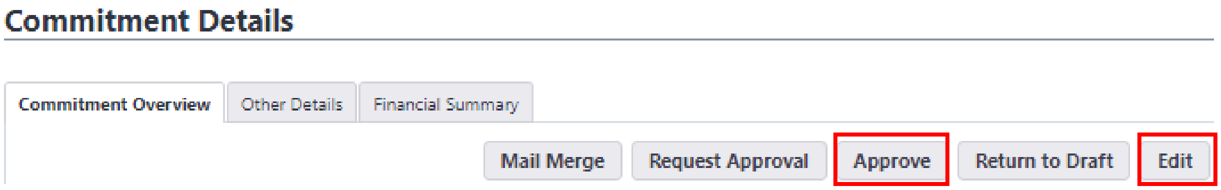


Click on the link in the "Description" column to access the "Commitment Details" page for the line item commitment you wish to edit or approve.



	#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment
	HCI - 00009	24-CSCU-HAZ-900 - Environmental & Abatement (HC - 7)	LANGAN ENGINEERING AND ENVIRONMENTAL	10.05.2023	Pending	HazMat Program	50,000.00		50,000.00
	HCI - 00010	24-CSCU-HAZ-900 - Environmental & Abatement (HC - 7)	NEW ENGLAND YANKEE CONSTRUCTION LLC	10.05.2023	Pending	HazMat Program	100,000.00		100,000.00

After opening the “Commitment Details” page, you can either click the “Approve” button, if you wish to approve the commitment as is, or click the “Edit” button if you wish to edit the commitment amount.



If the “Edit” button was clicked, then scroll down to the section entitled “Commitment Items” and scroll over to the column entitled “Amount”. Click on the “Pencil” toggle to edit the commitment amount. Upon completion, scroll down to the bottom of the page and click the “Save” button.

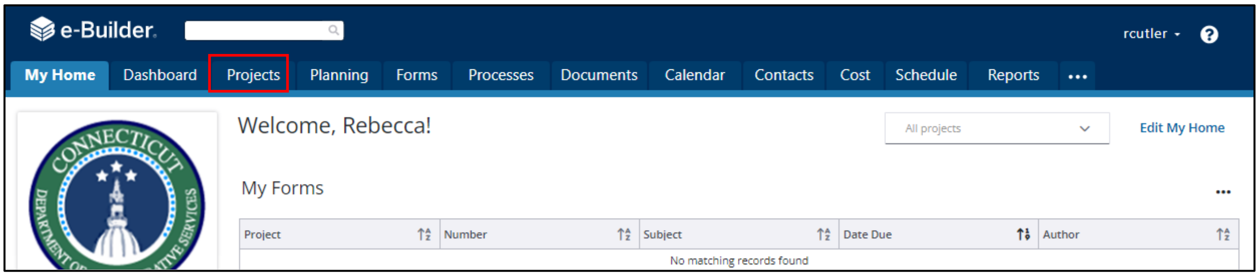
After saving your changes, you can either click the “Approve” button, if you wish to approve the commitment, or closeout of the “” page until such time that you wish to approve the commitment.

Section 14: 6010 Bid Release Form

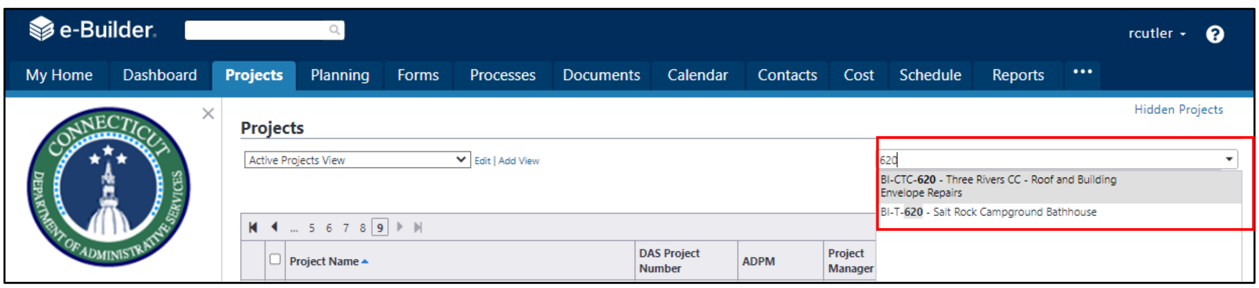
14.01 Accessing the Form

Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f

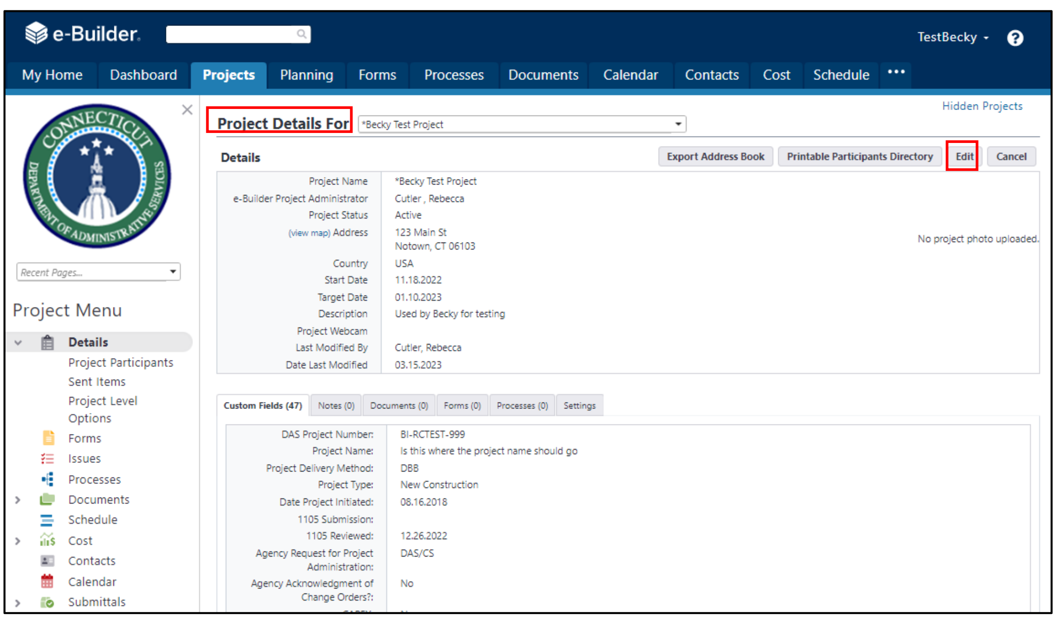
On your homepage, find your project by clicking on the top tab for “Projects”:



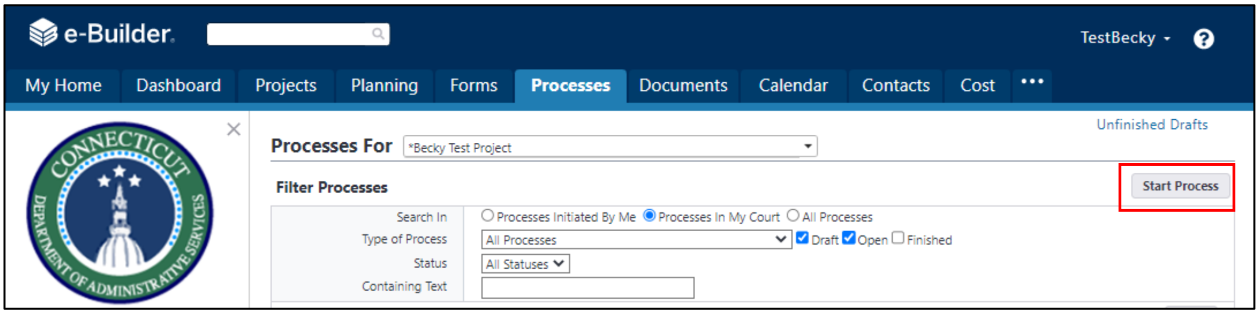
Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



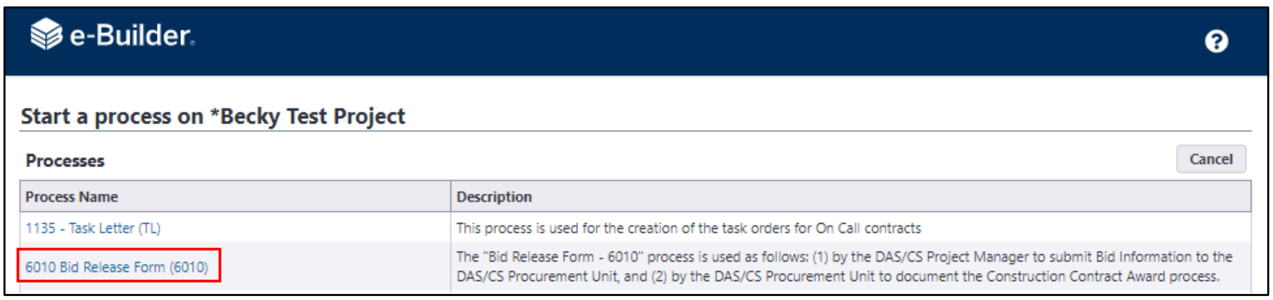
The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.



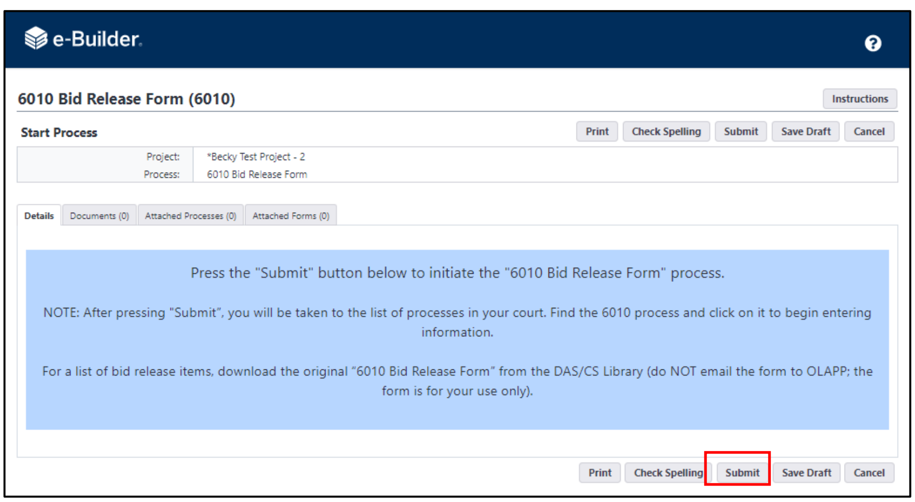
Click on “Start Process” to find and start a process.



Click on “6010 Bid Release Form (6010)” to begin the process.

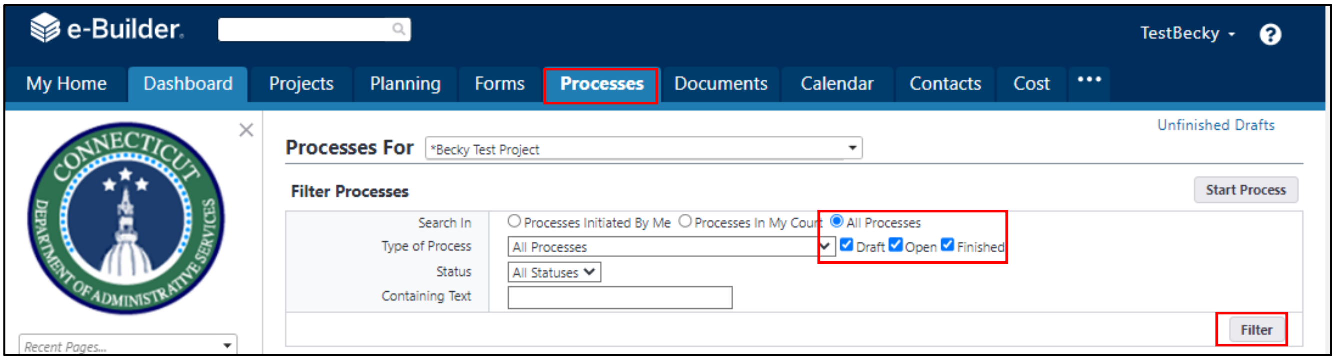


Read the first page and then click on “Submit”.

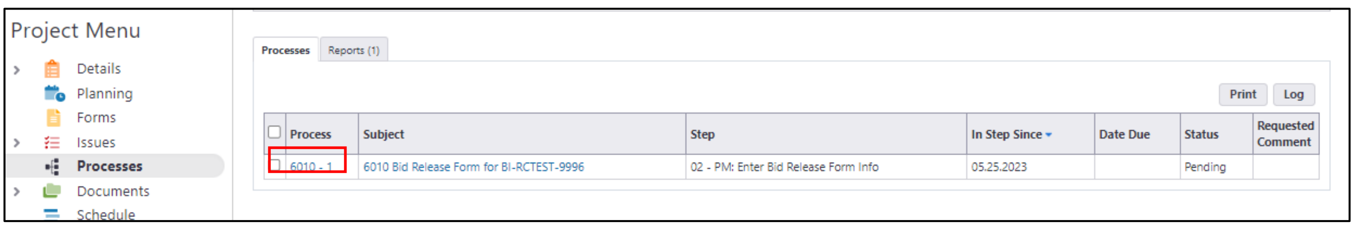


14.02 Project Manager Instructions for Entering Bid Release Form Information:

On the Processes page, if you cannot find the process, check the boxes for “Draft”, “Open”, and “Finished”, and click on “Filter”. This should show you the process for 6010.

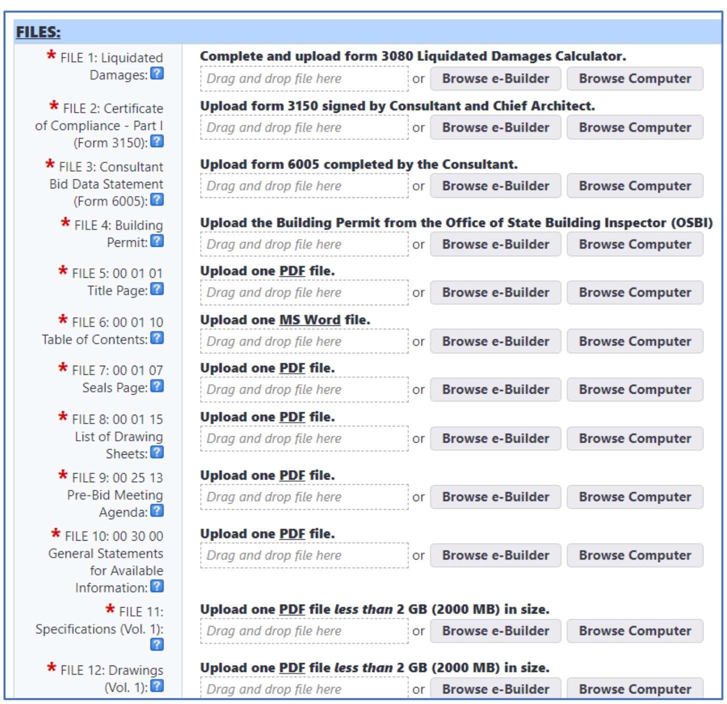


On the Processes page for the Project, click on the process for 6010.



Read the “Bid Release Form Instructions”.

Upload all files indicated with a red asterisk (*).



Enter all Bid Information as instructed. Any items indicated with a red asterisk (*) are required.

For Supplemental Bids and Named Subcontractors, follow the instructions in the process. Once the Bid Information has been entered, you have three options:

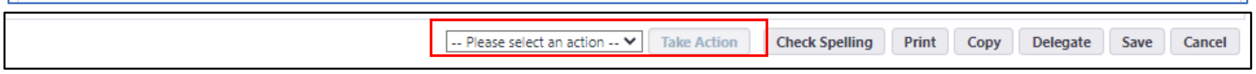
1. Save as a Draft: Select “Save”.
2. Perform Final Review Prior to Submitting to the Procurement Unit: Click on “Please select an action”, select “Review”, then click on “Take Action”.
3. Delete this Process: Click on “Please select an action”, select “Void”, then click on “Take Action”.

NOTE: You will LOSE all of the information you have input and will NOT be able to return to this page.

"TAKE ACTION" INSTRUCTIONS:

NOTES TO PROJECT MANAGER:

- To save as a draft, select “**Save**” at the bottom of this page.
- To perform the final review prior to submitting to Bidding, click "**Please select an action**", select “**Review**”, and then click "**Take Action**".
- To delete this process, click "**Please select an action**", select “**Void**” and “**Take Action**”. **NOTE:** You will **LOSE** all of the information you have submitted and will **NOT** be able to return to this page.



14.03 Project Manager Instructions for Reviewing the Bid Release Form Information:

From the Processes page for the Project, click on the process for 6010. Review the Bid Information. If the information is correct and complete, you have three options:

1. Save as a Draft: Select “Save”.
2. Submit to the Procurement Unit: Click on “Please select an action”, select “Submit”, then click on “Take Action”.
3. Delete this Process: Click on “Please select an action”, select “Void”, then click on “Take Action”.

The process is then in Procurement Unit’s ball court.

BID RELEASE FORM SUBMITTAL & "TAKE ACTION" INSTRUCTIONS:

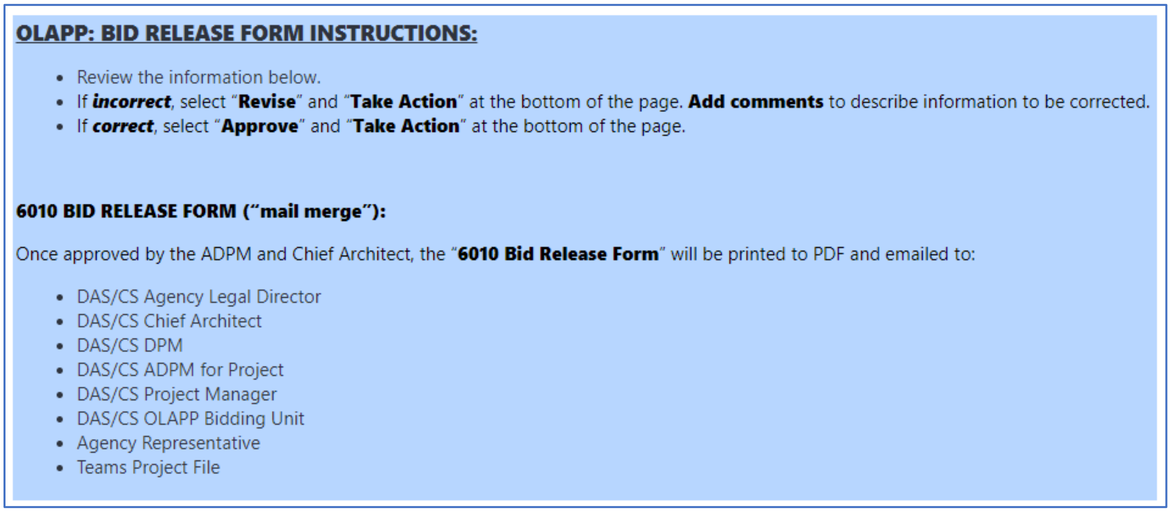
NOTES TO PROJECT MANAGER:

- Review all of the information above.
- Ensure that any information with a “*” has been completed (it is required).
- To save as a draft, select “**Save**” at the bottom of this page.
- To submit to Bidding, click "**Please select an action**", select “**Submit**”, and then click "**Take Action**".
- To delete this process, click "**Please select an action**", select “**Void**” and “**Take Action**”. **NOTE:** You will **LOSE** all of the information you have submitted and will **NOT** be able to return to this page.

14.04 Procurement Unit Instructions for Bid Release Form:

Read the instructions. Download the files. Review the Bid Information.

At the bottom (or top) of the page, click on "Please select an action" and select "Approve" or "Revise". Then click on "Take Action". The process is then in the ADPM's ball court.



OLAPP: BID RELEASE FORM INSTRUCTIONS:

- Review the information below.
- If ***incorrect***, select "**Revise**" and "**Take Action**" at the bottom of the page. **Add comments** to describe information to be corrected.
- If ***correct***, select "**Approve**" and "**Take Action**" at the bottom of the page.

6010 BID RELEASE FORM ("mail merge"):

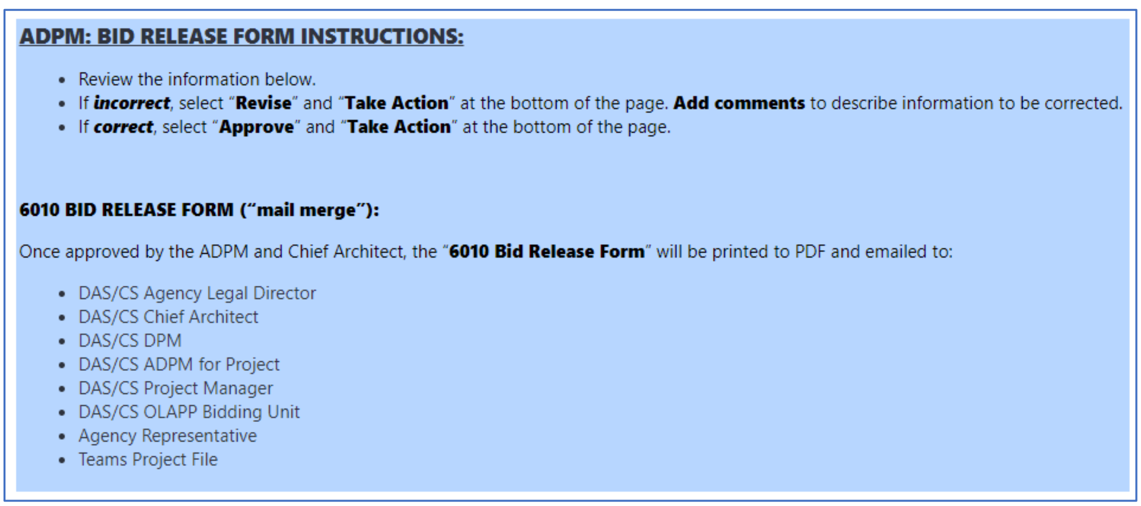
Once approved by the ADPM and Chief Architect, the "**6010 Bid Release Form**" will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

14.05 ADPM Instructions for Bid Release Form:

Read the instructions. Review the Bid Information.

Click on "Please select an action" and select "Approve" or "Revise". Then click on "Take Action". The process is then in the Chief Architect's ball court.



ADPM: BID RELEASE FORM INSTRUCTIONS:

- Review the information below.
- If ***incorrect***, select "**Revise**" and "**Take Action**" at the bottom of the page. **Add comments** to describe information to be corrected.
- If ***correct***, select "**Approve**" and "**Take Action**" at the bottom of the page.

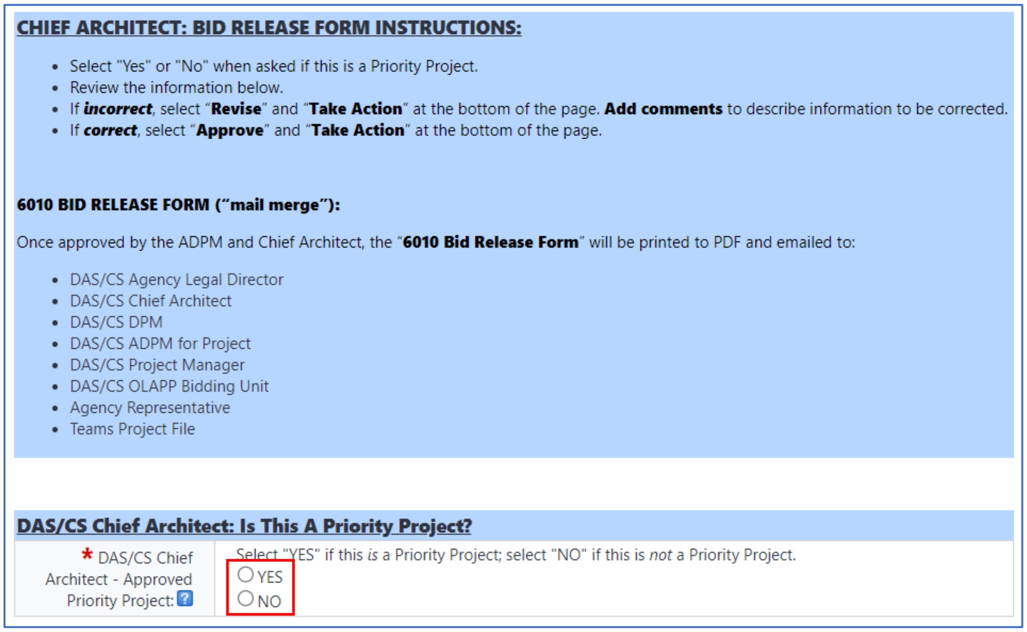
6010 BID RELEASE FORM ("mail merge"):

Once approved by the ADPM and Chief Architect, the "**6010 Bid Release Form**" will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

14.06 Chief Architect Instructions for Bid Release Form:

Read the instructions. Select Yes or No for Priority Project. Review the bid information. Click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”.



CHIEF ARCHITECT: BID RELEASE FORM INSTRUCTIONS:

- Select "Yes" or "No" when asked if this is a Priority Project.
- Review the information below.
- If ***incorrect***, select "**Revise**" and "**Take Action**" at the bottom of the page. **Add comments** to describe information to be corrected.
- If ***correct***, select "**Approve**" and "**Take Action**" at the bottom of the page.

6010 BID RELEASE FORM (“mail merge”):

Once approved by the ADPM and Chief Architect, the "**6010 Bid Release Form**" will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

DAS/CS Chief Architect: Is This A Priority Project?

* DAS/CS Chief Architect - Approved Priority Project:	Select "YES" if this *is* a Priority Project; select "NO" if this is *not* a Priority Project. ○ YES ○ NO

14.07 6010 Mail Merge:

When the 6010 Bid Release Form has been reviewed and approved by the Procurement Unit, the ADPM, and the Chief Architect, the 6010 Bid Release Form “mail merge” will be generated as a PDF document and emailed to everyone as indicated at the beginning of the process.

The 6010 Mail Merge will also be saved in the following e-Builder Documents folder:
Documents > 08 Bidding > DAS Procurement

Once the 6010 Mail Merge step is complete, the process is in the Procurement Unit’s ball court.

14.08 Procurement Unit Instructions for Pre-Bid Meeting Information:

Enter the Date of the Bid Advertisement and the Planned Date of the Bid Advertisement Ending. Select “Send” and “Take Action” to forward the process to the Project Manager.

The process is then in the Project Manager’s ball court, who will have three (3) days to enter the Pre-Bid Meeting Information and re-submit back to the Procurement Unit.

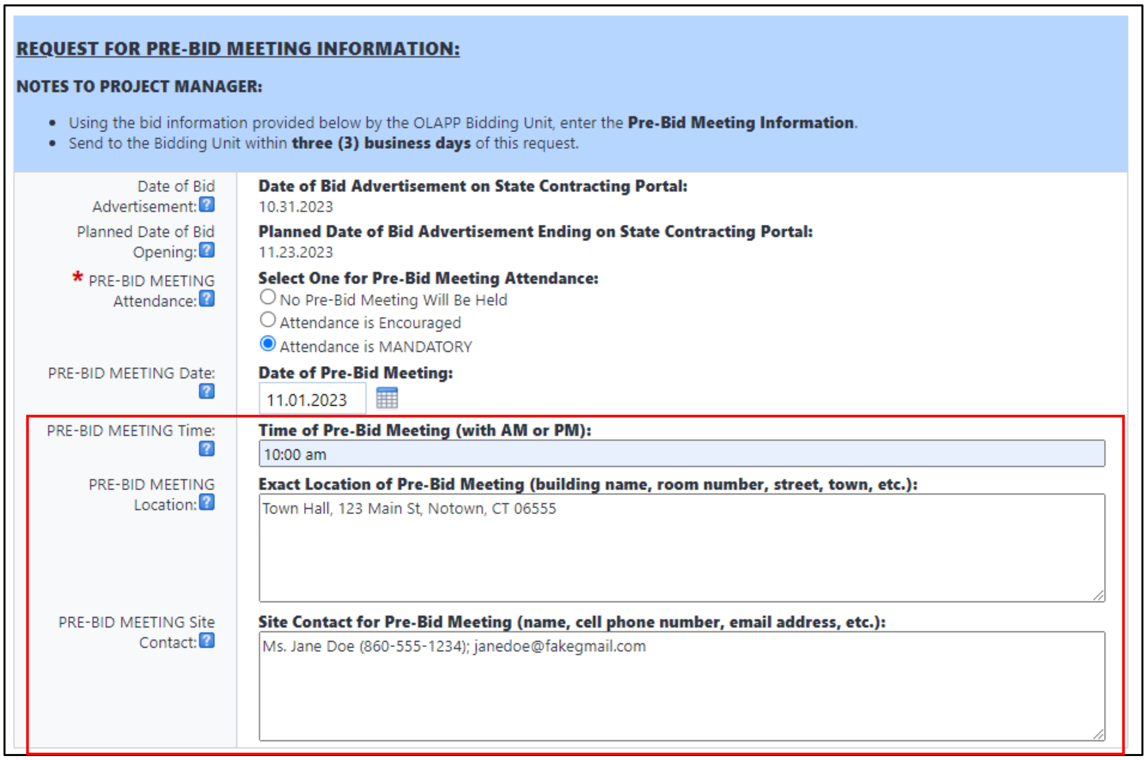
BID SCHEDULE:

- **Bidding:** Enter the following information for the bid:

Date of Bid Advertisement:	**Date of Bid Advertisement on State Contracting Portal:** 10.31.2023
Planned Date of Bid Opening:	**Planned Date of Bid Advertisement Ending on State Contracting Portal:** 11.23.2023

14.09 Project Manager Instructions for Pre-Bid Meeting Information:

Enter the Pre-Bid Meeting Information and send the process back to Bidding within three (3) days by selecting “Send” and “Take Action”. The process is then in the Procurement Unit’s ball court.



REQUEST FOR PRE-BID MEETING INFORMATION:

NOTES TO PROJECT MANAGER:

- Using the bid information provided below by the OLAPP Bidding Unit, enter the **Pre-Bid Meeting Information**.
- Send to the Bidding Unit within **three (3) business days** of this request.

Date of Bid Advertisement:	**Date of Bid Advertisement on State Contracting Portal:** 10.31.2023
Planned Date of Bid Opening:	**Planned Date of Bid Advertisement Ending on State Contracting Portal:** 11.23.2023
* PRE-BID MEETING Attendance:	**Select One for Pre-Bid Meeting Attendance:** No Pre-Bid Meeting Will Be Held / Attendance is Encouraged / Attendance is MANDATORY (selected)
PRE-BID MEETING Date:	**Date of Pre-Bid Meeting:** 11.01.2023
PRE-BID MEETING Time:	**Time of Pre-Bid Meeting (with AM or PM):** 10:00 am
PRE-BID MEETING Location:	**Exact Location of Pre-Bid Meeting (building name, room number, street, town, etc.):** Town Hall, 123 Main St, Notown, CT 06555
PRE-BID MEETING Site Contact:	**Site Contact for Pre-Bid Meeting (name, cell phone number, email address, etc.):** Ms. Jane Doe (860-555-1234); janedoe@fakegmail.com

14.10 Procurement Unit Instructions for Reviewing the Pre-Bid Meeting Information:

Review the Pre-Bid Meeting Information. You have three options:

1. Select “Save” to save as a draft.
2. If the information is correct, select “Go To Wages” and “Take Action” to enter the dates that the Prevailing Wages were requested from the Department of Labor.
3. If edits are required, select “Revise” and “Take Action” to send the process back to the Project Manager.

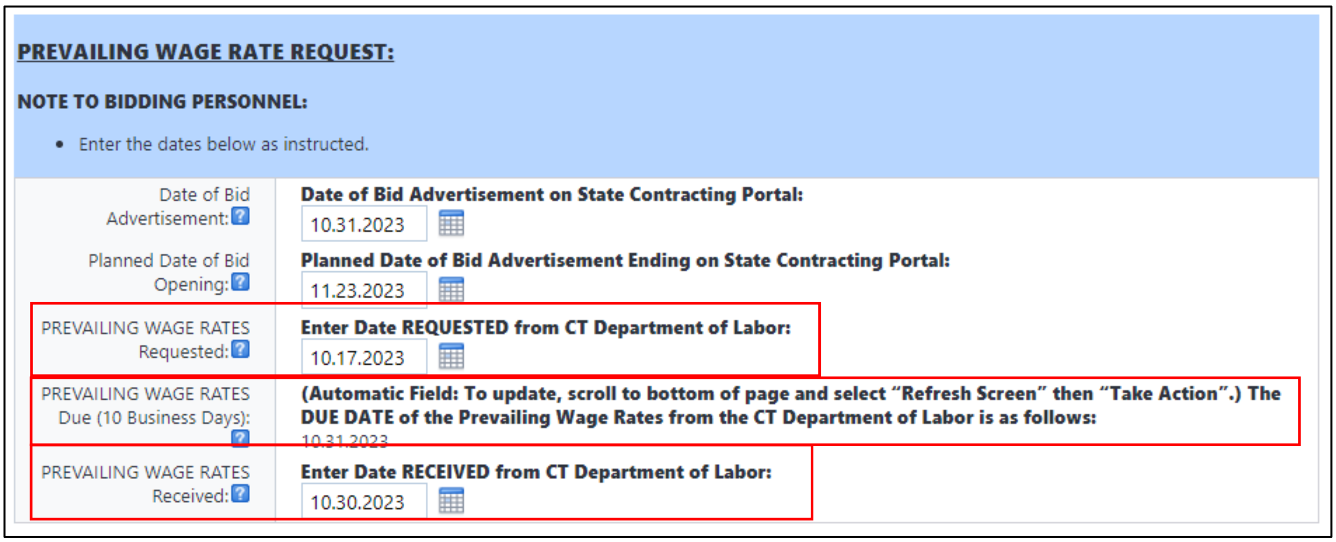
PRE-BID MEETING INFORMATION:

Date of Bid Advertisement:	**Date of Bid Advertisement on State Contracting Portal:** 10.31.2023
Planned Date of Bid Opening:	**Planned Date of Bid Advertisement Ending on State Contracting Portal:** 11.23.2023
PRE-BID MEETING Attendance:	**Select One for Pre-Bid Meeting Attendance:** Attendance is MANDATORY
PRE-BID MEETING Date:	**Date of Pre-Bid Meeting:** 11.01.2023
PRE-BID MEETING Time:	**Time of Pre-Bid Meeting (with AM or PM):** 10:00 am
PRE-BID MEETING Location:	**Exact Location of Pre-Bid Meeting (building name, room number, street, town, etc.):** Town Hall, 123 Main St, Notown, CT 06555
PRE-BID MEETING Site Contact:	**Site Contact for Pre-Bid Meeting (name, cell phone number, email address, etc.):** Ms. Jane Doe (860-555-1234); janedoe@fakegmail.com

14.11 Procurement Unit Instructions for Prevailing Wage Rates:

NOTE: Instructions are provided in e-Builder for requesting Prevailing Wage Rates from the Department of Labor. The request itself is conducted separately from e-Builder. E-Builder is only used to track the dates that the wage rates were requested and the dates they were received.

Enter the Date Requested and (if available) Date Received. Select either "Refresh Screen" (to view the date that the wage rates are due) or "Go To Bid" to view Bid Information from the Project Manager and to begin entering additional Bid Information.



PREVAILING WAGE RATE REQUEST:

NOTE TO BIDDING PERSONNEL:

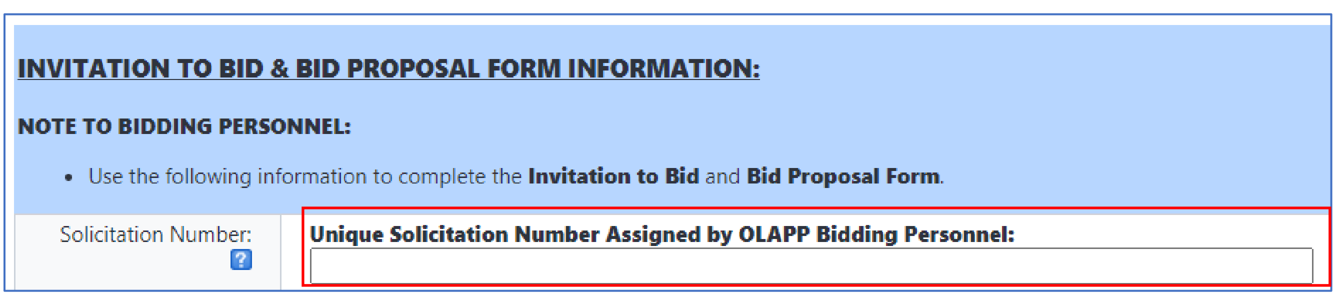
- Enter the dates below as instructed.

Date of Bid Advertisement:	**Date of Bid Advertisement on State Contracting Portal:** 10.31.2023
Planned Date of Bid Opening:	**Planned Date of Bid Advertisement Ending on State Contracting Portal:** 11.23.2023
PREVAILING WAGE RATES Requested:	**Enter Date REQUESTED from CT Department of Labor:** 10.17.2023
PREVAILING WAGE RATES Due (10 Business Days):	**(Automatic Field: To update, scroll to bottom of page and select "Refresh Screen" then "Take Action".) The DUE DATE of the Prevailing Wage Rates from the CT Department of Labor is as follows:** 10.31.2023
PREVAILING WAGE RATES Received:	**Enter Date RECEIVED from CT Department of Labor:** 10.30.2023

14.12 Procurement Unit Instructions for Bidding Information:

NOTE: After Pre-Bid Meeting Information and Prevailing Wages Request Information has been entered, the Procurement Unit arrives at the final Bid Information page. The Procurement Unit will insert the Unique Solicitation Number and use the information to complete the Invitation to Bid and Bid Proposal Form outside of e-Builder. The Procurement Unit will also enter the Actual Date that the Bid Advertisement ends as well as the Number of Addendum for the Solicitation.

Follow the instructions on the e-Builder page in order to enter information and dates. Select "Refresh Screen" and "Take Action" at the bottom (or top) of the page in order to update Automatic Fields.

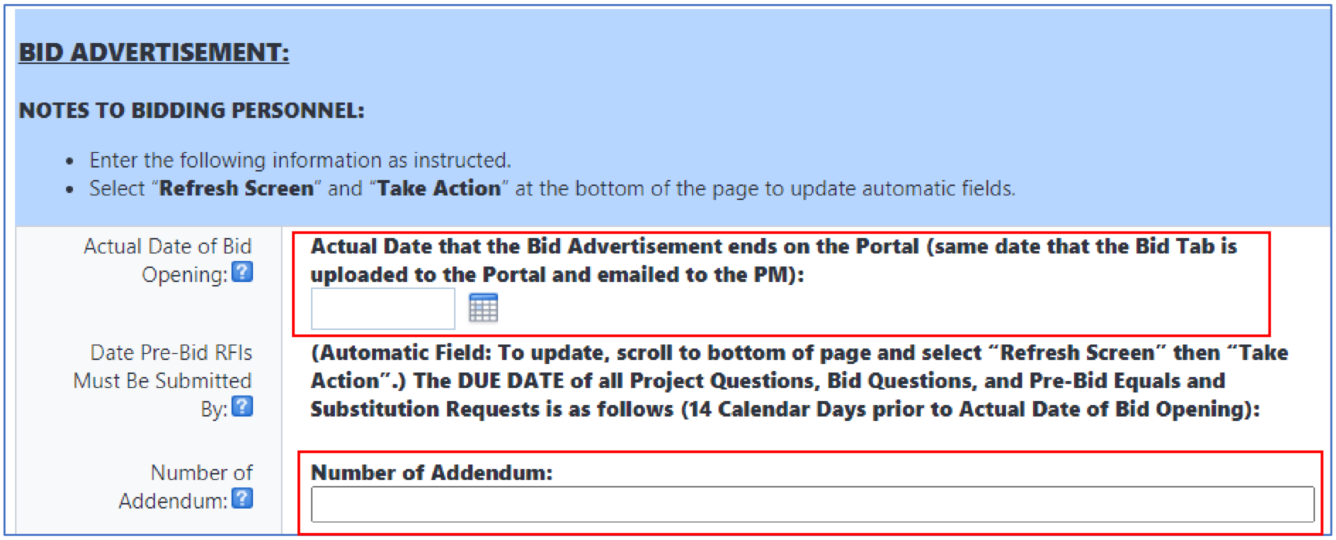


INVITATION TO BID & BID PROPOSAL FORM INFORMATION:

NOTE TO BIDDING PERSONNEL:

- Use the following information to complete the **Invitation to Bid** and **Bid Proposal Form**.

Solicitation Number:	**Unique Solicitation Number Assigned by OLAPP Bidding Personnel:**



BID ADVERTISEMENT:

NOTES TO BIDDING PERSONNEL:

- Enter the following information as instructed.
- Select "**Refresh Screen**" and "**Take Action**" at the bottom of the page to update automatic fields.

Actual Date of Bid Opening:	**Actual Date that the Bid Advertisement ends on the Portal (same date that the Bid Tab is uploaded to the Portal and emailed to the PM):**
Date Pre-Bid RFIs Must Be Submitted By:	**(Automatic Field: To update, scroll to bottom of page and select "Refresh Screen" then "Take Action".) The DUE DATE of all Project Questions, Bid Questions, and Pre-Bid Equals and Substitution Requests is as follows (14 Calendar Days prior to Actual Date of Bid Opening):**
Number of Addendum:	**Number of Addendum:**

14.13 Procurement Unit Instructions for 6010 Bid Release Form Closeout:

Once the Project has gone into construction (or the Bid is cancelled/no award), close the e-Builder 6010 Bid Release Form process by selecting "Closeout" and "Take Action".

NOTE: "Closeout" will permanently close the process – do NOT select this option if the process is still open.

Section 15: (Reserved for future instructions)

Section 16: (Reserved for future instructions)

Section 17: GC / CMR - Create Schedule of Values

17.01 SOV Approval for Upload

Construction Support Services (CSS) uploads SOVs into e-Builder commitments upon request of the DAS project manager for that project. Please submit a request for the project manager to ask CSS to carry out the upload of the file described in Section 17.02, below.

17.02 SOV file format

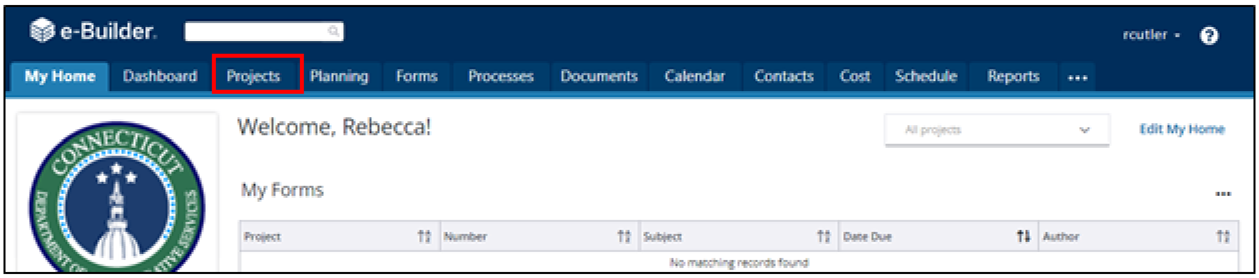
When sending the SOV for upload, please follow the following format:

1. Use Excel, another similar spreadsheet format or CSV. Please do not send it in PDF, Word or similar file formats.
2. If the file is Excel or another spreadsheet, the data should be in a single sheet, not divided between two or more sheets.
3. Ensure that each SOV row has at least columns for (1) description or title and (2) SOV dollar amount. A row line number is permitted, as well.
4. Do not have any blank rows.
5. If it is desired to have rows that are section titles, please place this title in the description column and place a $0 in the amount column.

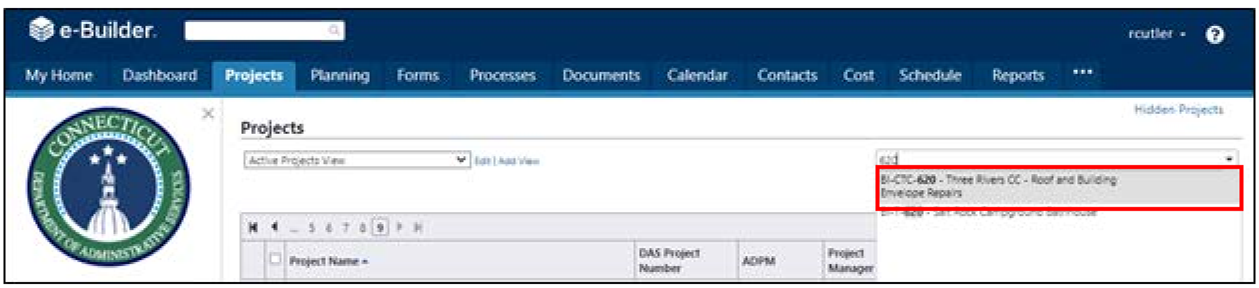
Section 18: Consultant and General Vendor Invoice

18.01 Access the project Process

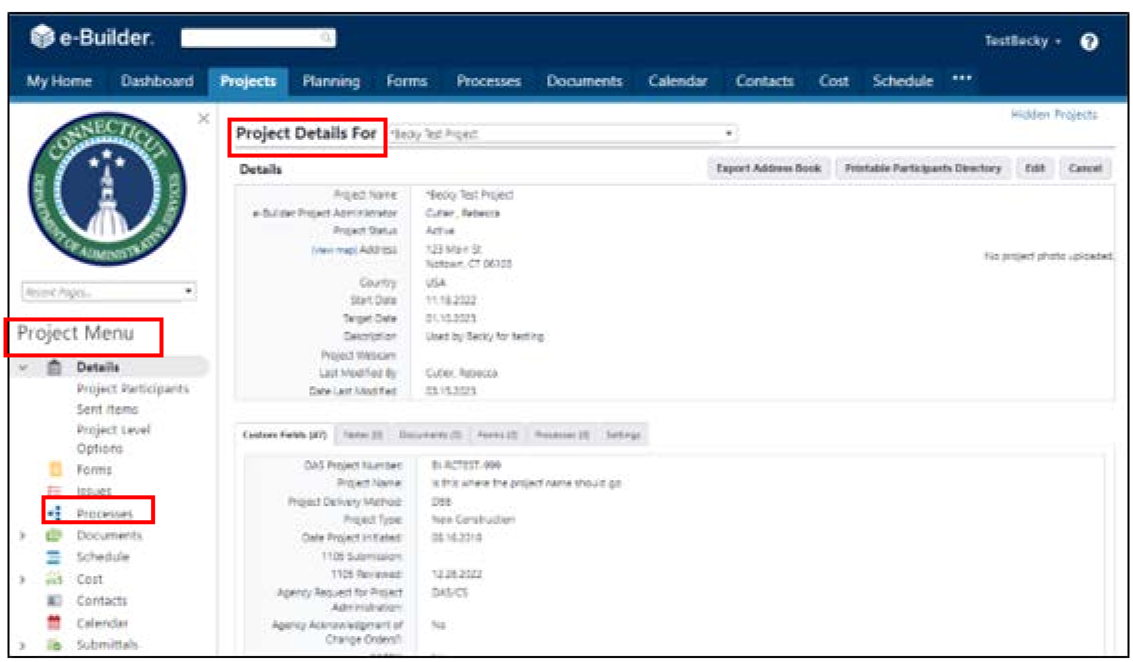
Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.

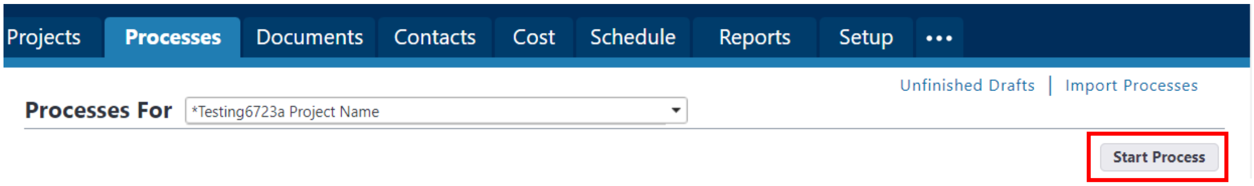


The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.



18.02 Initiate the invoicing Process.

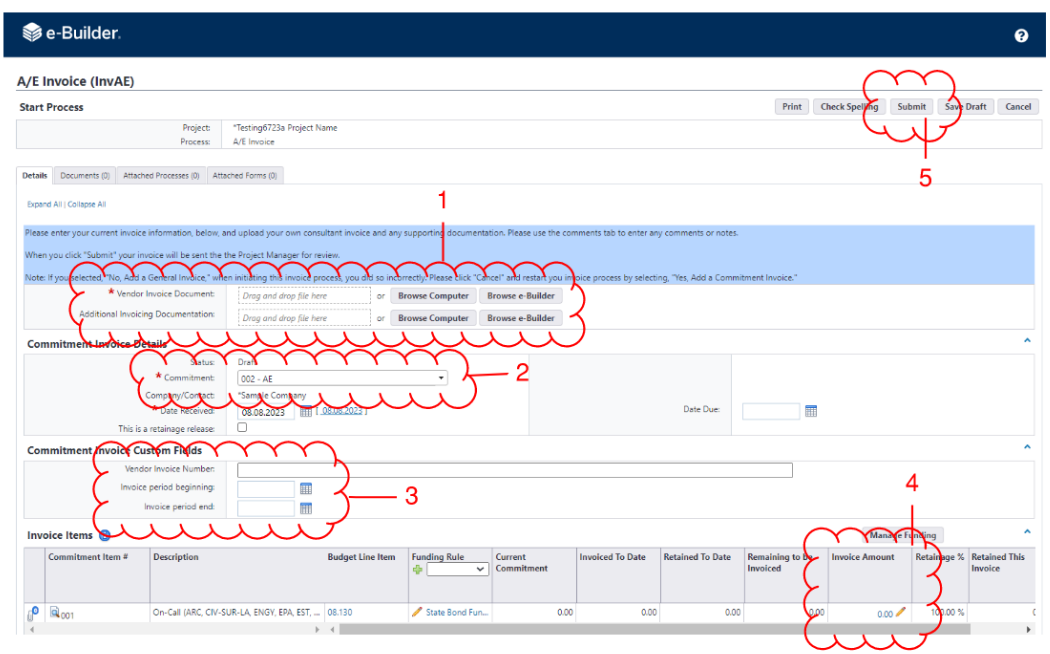
Click on “Start Process” to find and start a process.



A/E users then click on “A/E Invoice (InvAE)” to begin the process. Users from other consultant types click the equivalent process, including “CA Invoice (InvCA)”, “CMR Pre-Construction Invoice (CMpre)”, “Other Consultant Invoice (InvOt)” or “Hazmat Invoice (InvHz)”

Proceed as follows to complete the consultant Invoice form:

1. Either drag and drop the invoice into the “Drag and drop file here” or click “Browse Computer” to locate and upload the file. For other supporting documentation, a second upload block is available.
2. Select the applicable vendor commitment. Take care to select the correct commitment if the vendor has more than one task on the project. Once selected, note that the “Invoice Items” part populates.
3. Enter the vendor’s invoice number and the beginning and end dates for the invoice.
4. Click on the “0.00” or pencil icon the “Invoice Amount” column and enter the amount of the invoice.
5. When the invoice form is correct, click “Submit” to submit the invoice to the project manager. The “Save Draft” button is available to save the form as a draft and return later.

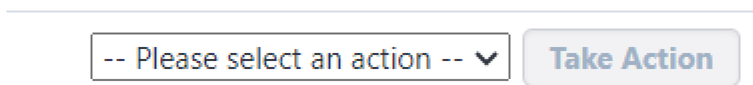


18.03 Invoices Returned for Revision

Once the form is submitted, the project manager may return it to the vendor if changes are needed.

Clicking on that will remove the current document, and a replacement can then be uploaded in its place.

After the needed changes are made, note, at the top and bottom of the pop-up, that there are workflow action controls.



By clicking “Please select an action” the user can select what action is intended on the invoice.

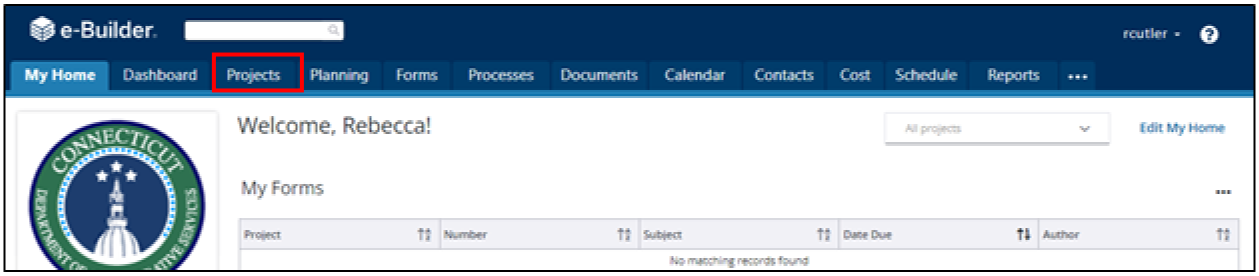
The option to “Resubmit” will appear and, if that is the intended action, select that. There is also an option to “Void”, which has the effect of closing review of the invoice and voiding the invoice process instance.

When the action is selected, clicking on the “Take Action” button finalizes the user’s action and sends the item to the next user in the workflow, if the “Resubmit” option is taken, or ends the workflow with no payment, if the “Reject” option is taken.

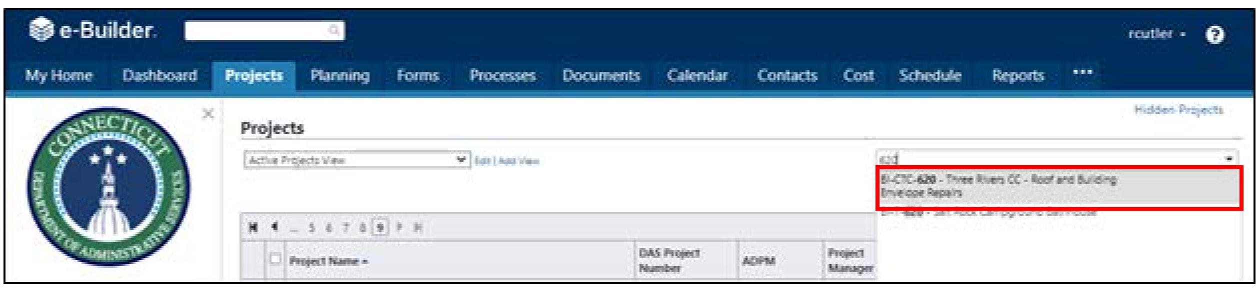
Section 18A: PM Review of Consultant & Vendor Invoice

18A.01 Access the Project Process

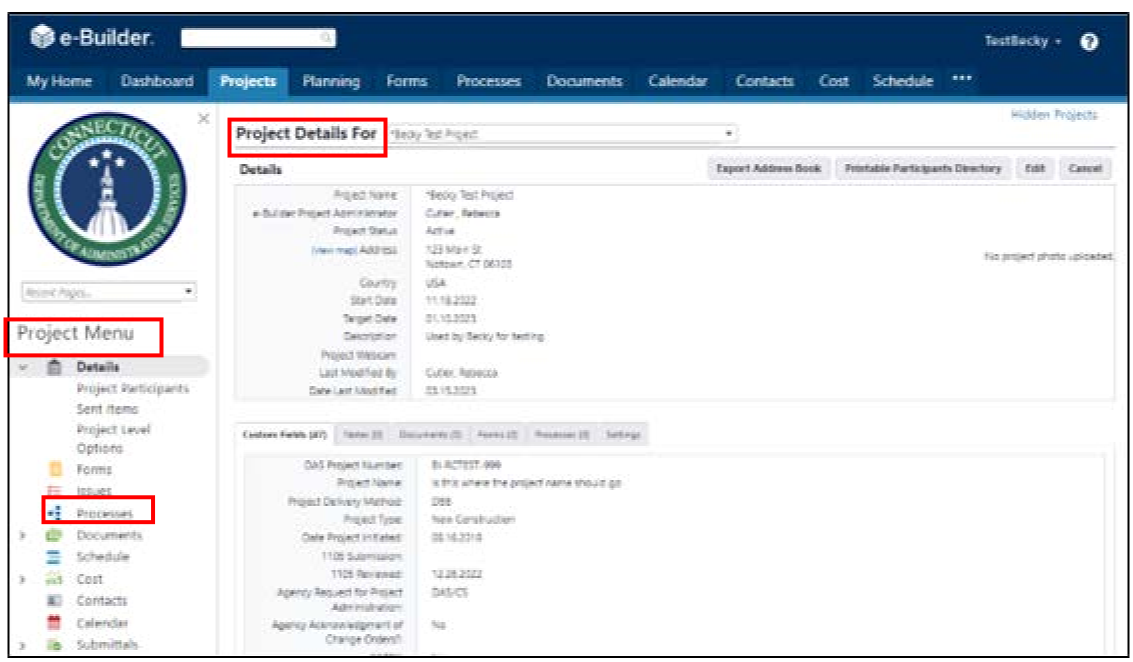
Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for "Projects":



Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.

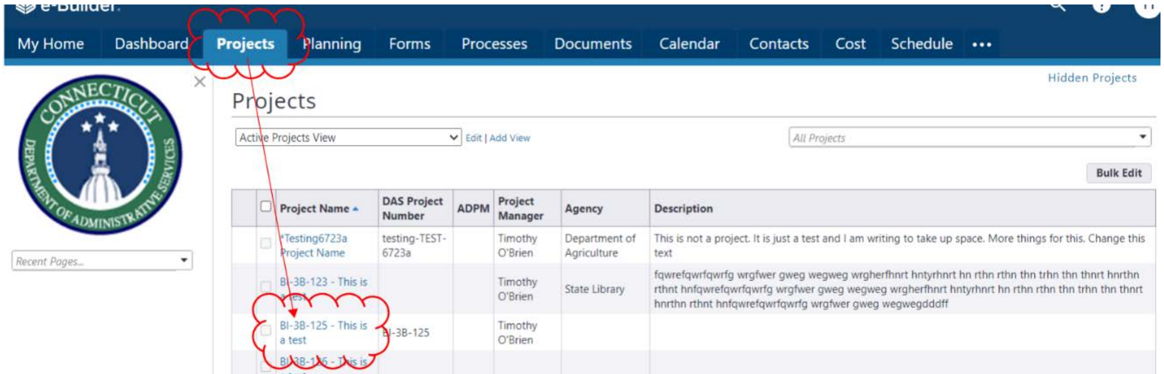


The "Project Details" page is your home page for your project. Under the "Project Menu" on the left, click on Processes to find project-specific processes.

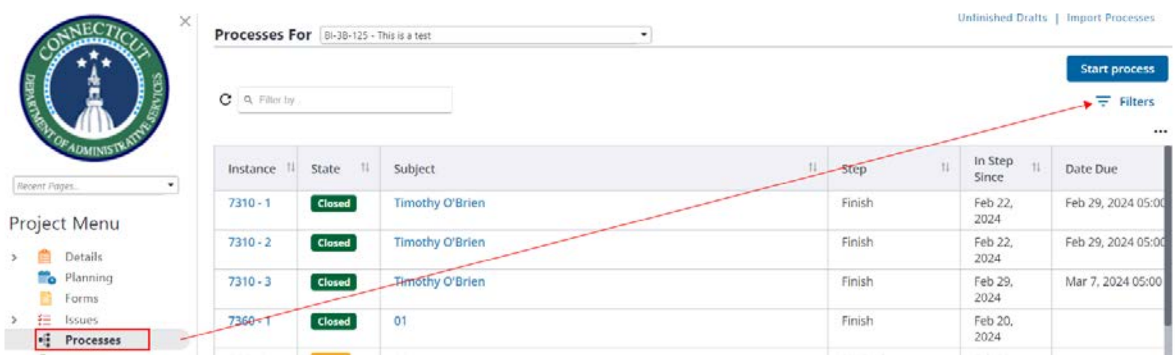


18A.02 Locate the Process Instance

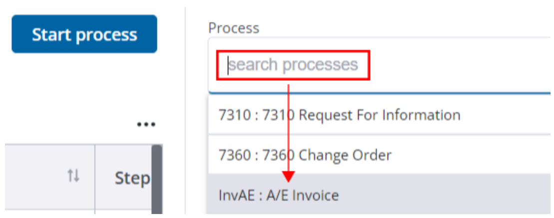
Click on the Projects tab and then open the project by clicking on the project name.



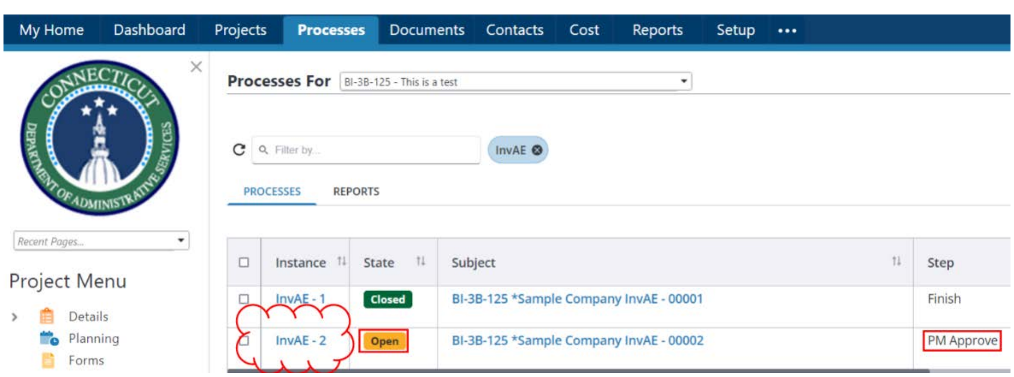
Next, click on the Processes module under the Project Menu and click on the Filters icon.



Under the Filters control, click "search processes". Then, click on the consultant type invoice that is to be reviewed, i.e. "A/E Invoice (InvAE)", "CA Invoice (InvCA)", etc.



Click on the process instance number for the pending invoice, which should appear in the "PM Approve" step. It will also appear as "Open" in the State column.



18A.03 Key Items for PM Review

Key items for PM Review include:

A. Click on the filename to cause a pop-up window to appear that has the vendor's invoice.

B. Under "Commitment Invoice Details", it is important to make sure that the vendor is invoicing their own company and the correct commitment, if they have more than one commitment on the project.

C. Vendor invoice number, and beginning and end dates are requested for the Business Office.

D. The Invoice Amount needs to be entered correctly for the e-Builder record to be accurate.

E. Select one of the following for payment of the invoice:

   a. Select "Business Office" to send the invoice automatically to the Business Office to be paid when the PM Approves the invoice, as described in items F and G, below.

   b. Select "Agency" to send the invoice to the appropriate agency to pay expenses on a project. If the "Agency" is paying the invoice, the person processing these payments will need to be added to the Agency Payor role on the project.

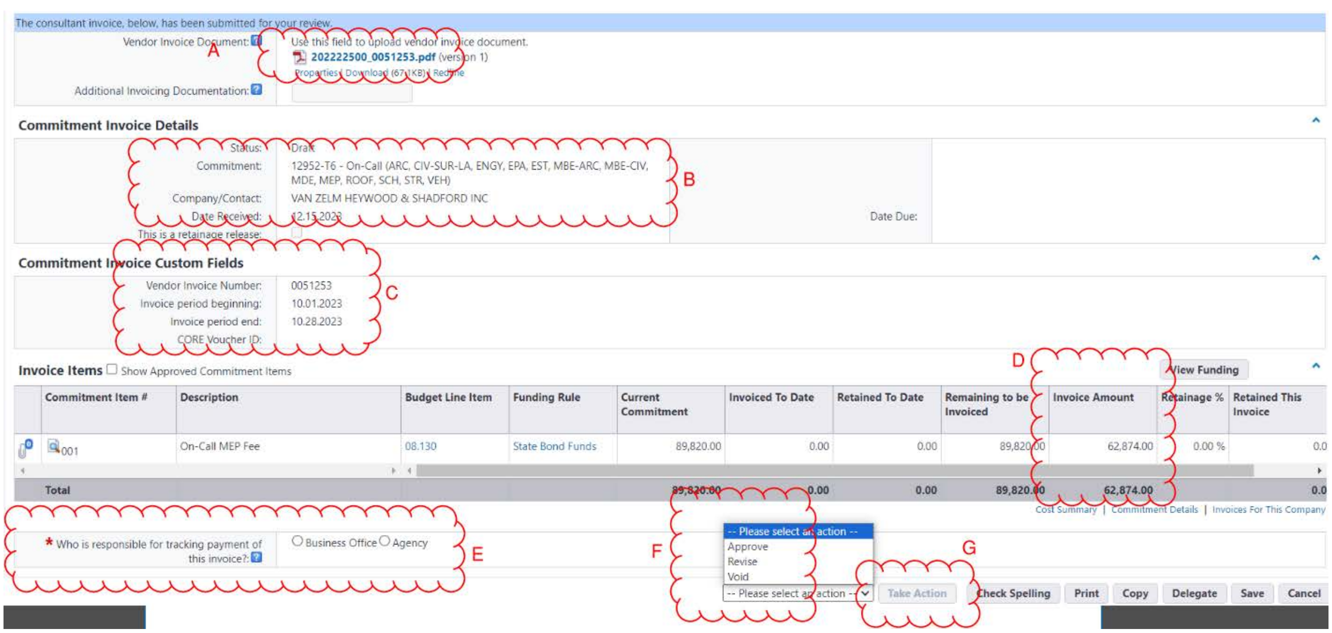
F. The Action pull down menu allows the PM to select Approve, Revise or Void.

   a. "Approve" causes the invoice, with a cover sheet noting that the PM has determined that it is OK to Pay, to be sent to the Business office or agency for payment, depending on what was selected in item E, above.

   b. "Revise" sends the invoice back to the vendor for any needed corrections. The PM will be prompted to enter comments for the vendor about what needs to be corrected.

   c. "Void" ends consideration of the invoice.

G. After the Action to be taken is selected, the Take Action button causes that Action.



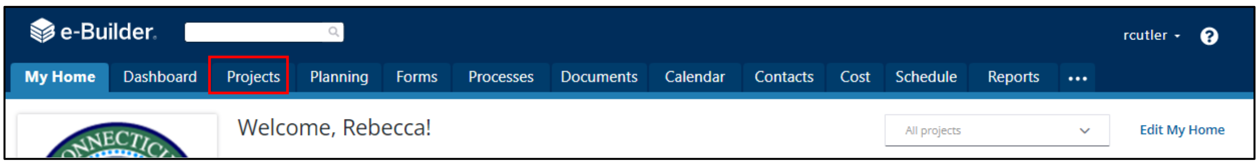
Section 18B: Hazmat Invoice Instructions for Agencies

18B.01 Access the Project Process

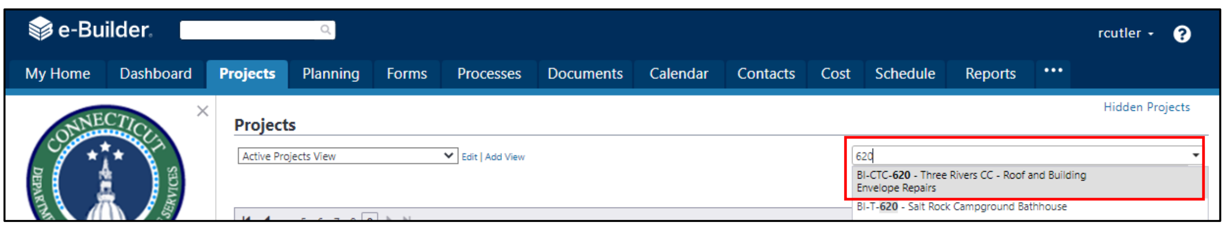
HazMat Invoices require review and approval by agencies. Agency staff will receive an email notification from eBuilder that an invoice is pending. To access the pending invoice, the agency can either click on the link in the email and the browser instance will appear as a pop-up.

Process instance is in your court. To view details or take action, click here.

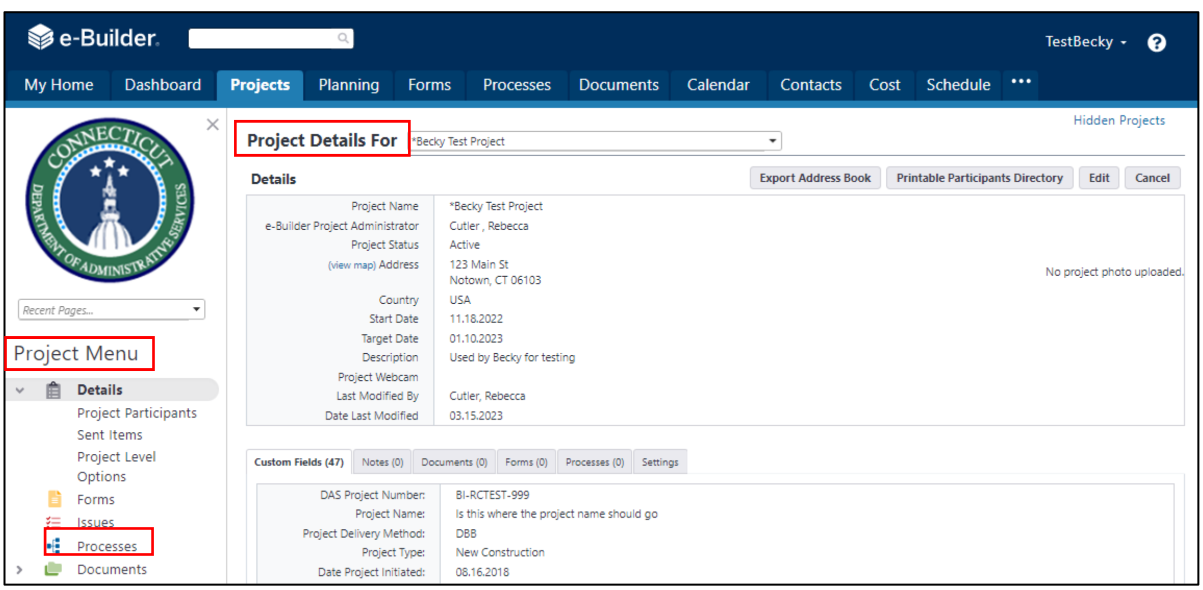
or the agency can log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f and click on the "Projects" tab to find the applicable project.



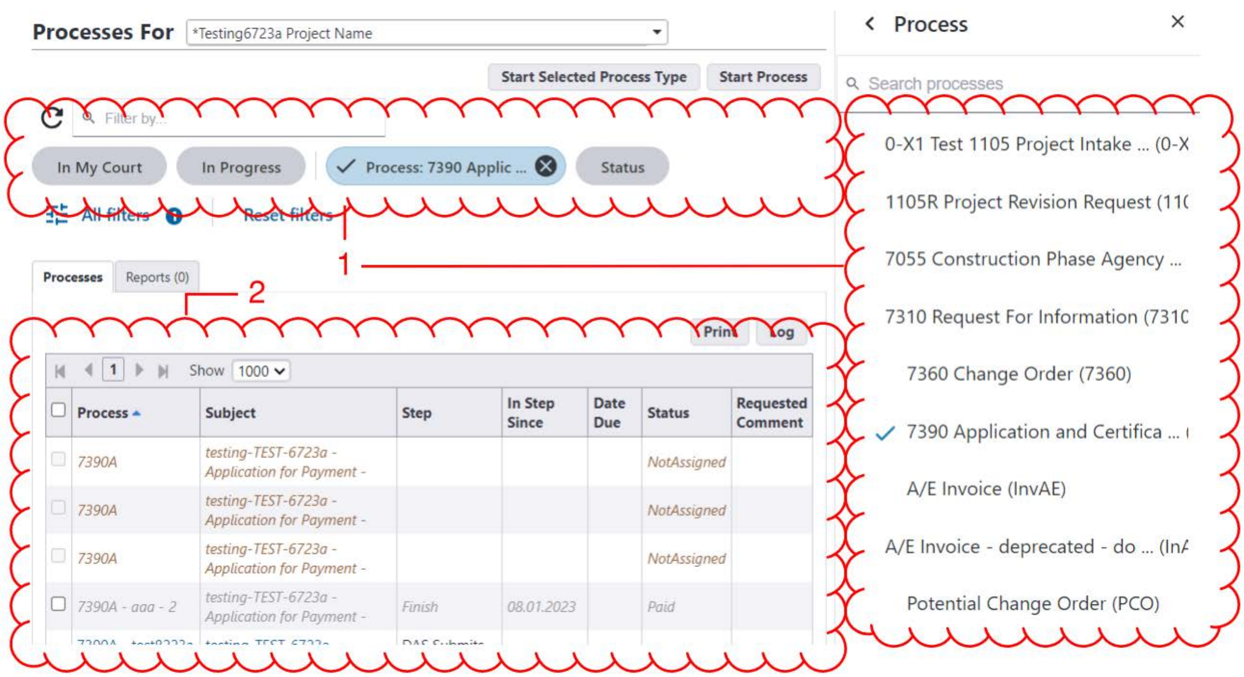
Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.



The "Project Details" page is your home page for your project. (Click "Edit" to edit info.). Under the "Project Menu" on the left, click on Processes to find project-specific processes.



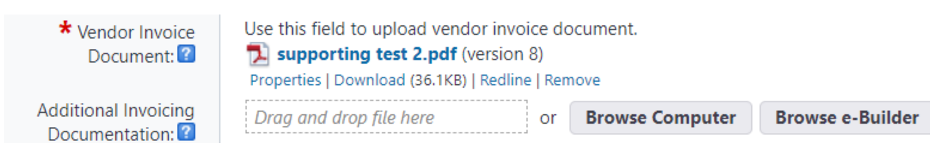
1. Change the Process filter settings to find the process instances you are looking for. In this case, switch Type of Process to “Hazmat Invoice (InvHz)”. Selecting All Processes will show all instances, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list appears here. Click on the instance you wish to open. A pop-up will open. That is the process instance.



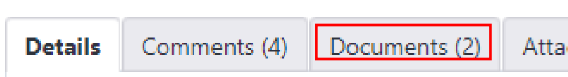
18B.02 Invoice Review

Regardless of which route used to access it, when the pop-up for the invoice process instance appears, review the invoice information.

1. Click on the document name in the “Vendor Invoice Document” field. A viewer pop-up will appear, allowing review of the vendor’s invoice document. There may be supporting materials attached to this document or in “Addition Invoicing Documentation” field.

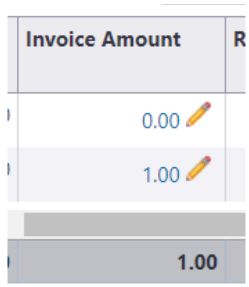


2. Documentation may also be uploaded into the Documents tab of the process instance. Review all documentation in each of these locations.



3. In the “Invoice Items” section, scroll to the right until the “Invoice Amount” column is seen. This is where the vendor should have entered the correct invoice amount. If there is more than one invoice

row, the correct amount should be in each row and the correct total for the invoice should appear in the gray summary row at the bottom.

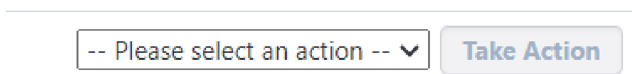


18B.03 Invoice Approval

If the information included in the invoice process instance is correct, and the agency wishes to approve, doing so involves two steps.

1. The first step is to select the “Agency Approver” and the approval date.

2. Then, at the top and bottom of the pop-up, there are workflow action controls.



3. By clicking “Please select an action” the user can select what action is intended on the invoice. The option to “Approve” will appear and, if that is the intended action, select that. There is also an option to “Reject”, which has the effect of closing review of the invoice and voiding the invoice process instance.

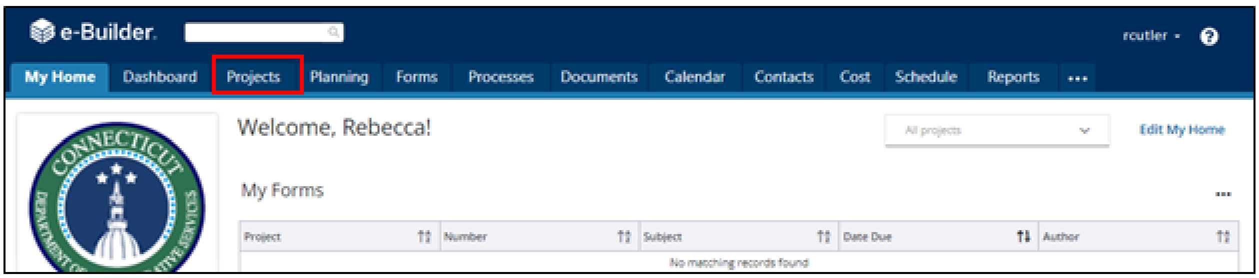
4. When the action is selected, clicking on the “Take Action” button finalizes the user’s action and sends the item to the next user in the workflow, if the “Approve” option is taken, or ends the workflow with no payment, if the “Reject” option is taken.

Section 19: 7390 Application and Certification for Payment

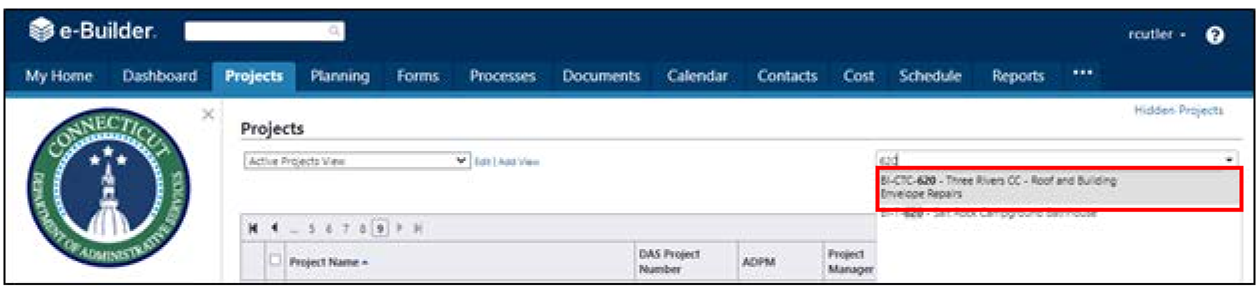
19A GC & CMR Users

19A.01 Instructions for the GC/CMR for creating and submitting Payment Applications:

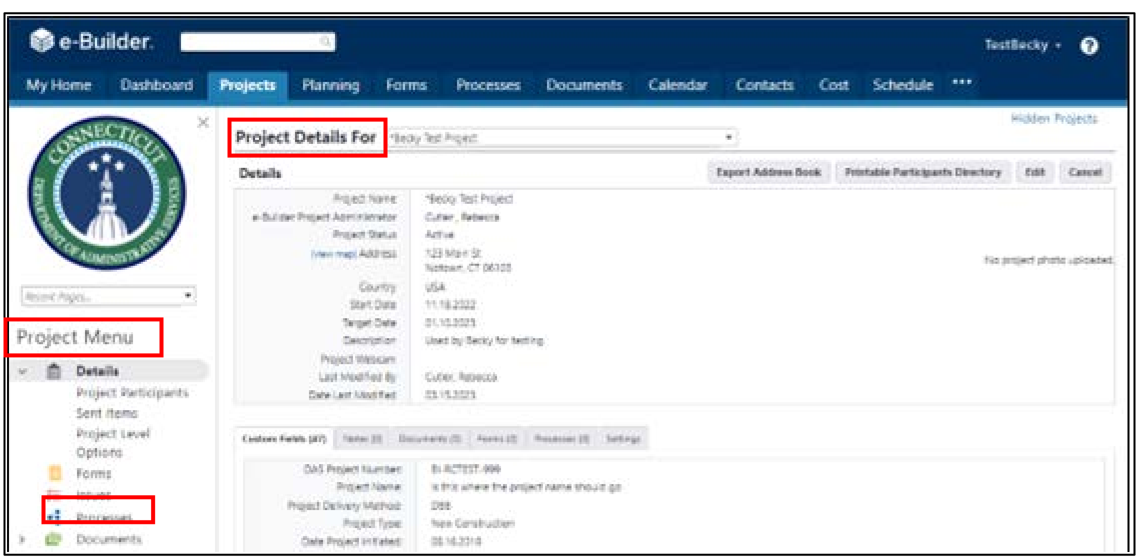
Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for "Projects":



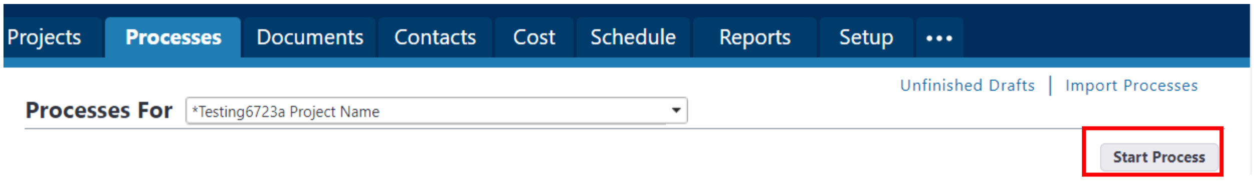
Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.



The "Project Details" page is your home page for your project. Under the "Project Menu" on the left, click on Processes to find project-specific processes.



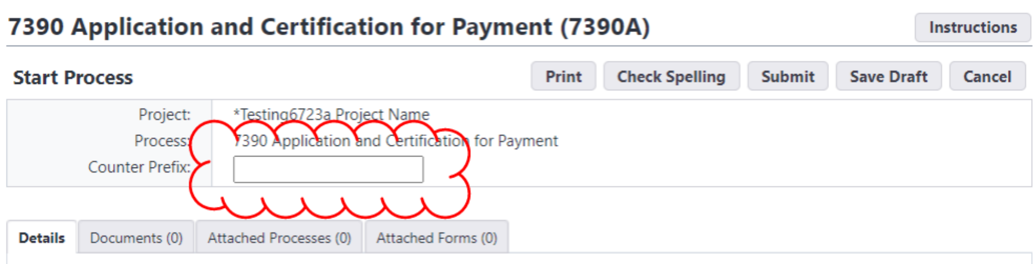
Click on “Start Process” to find and start a process.



Click on “7390 Application and Certification for Payment (7390A)” to begin the process.

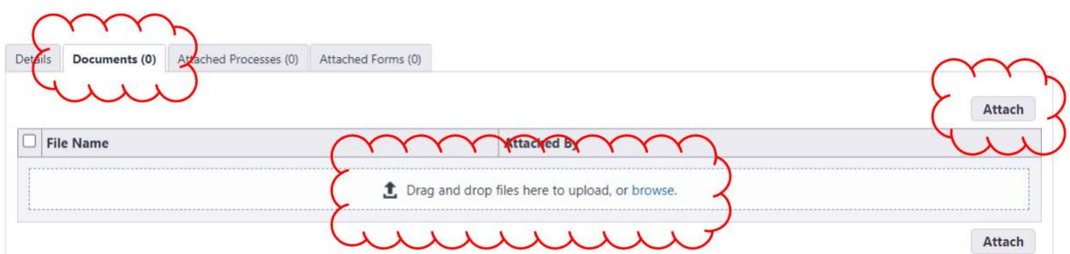
19A.02 Complete the Payment Application Form

In the “Counter Prefix” field, enter the Payment Application number of this payment application.

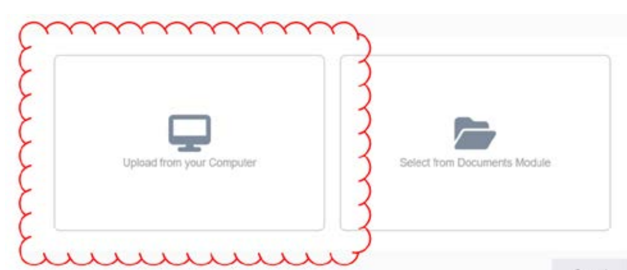


Carefully read and follow the instructions provided.

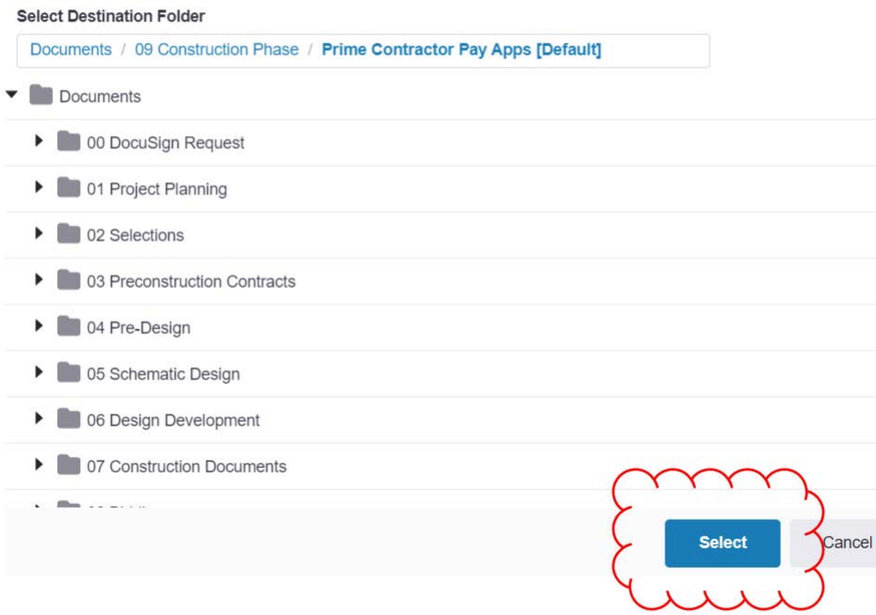
Upload supporting documentation for the Payment Application to the Documents tab. Click on the tab header to access the tab. Either drag-and-drop the documents to the tab or click the “Attach” button.



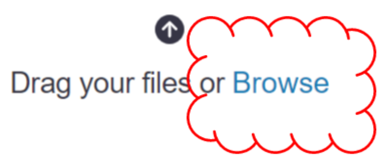
If the “Attach” button is clicked, a pop-up will appear. Click “Upload from your Computer” to locate a locally stored document.



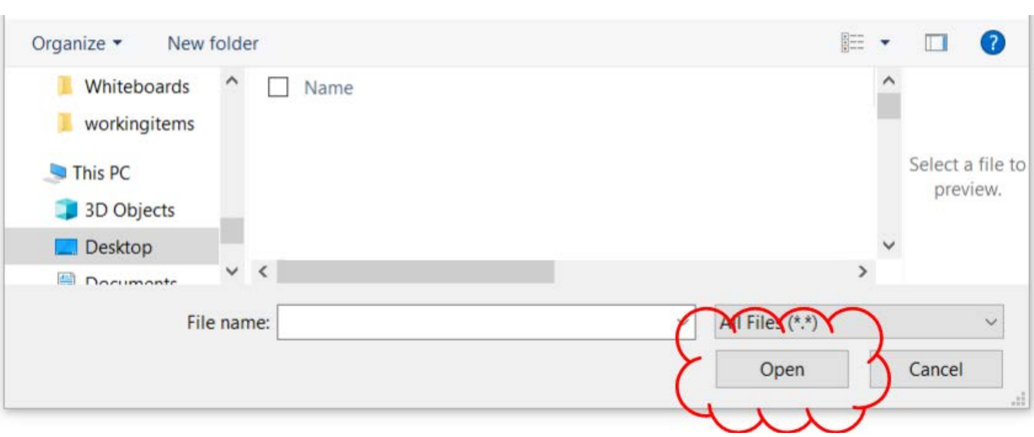
Then, click "Select" to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the supporting documents. If applicable, an alternate folder can be selected.



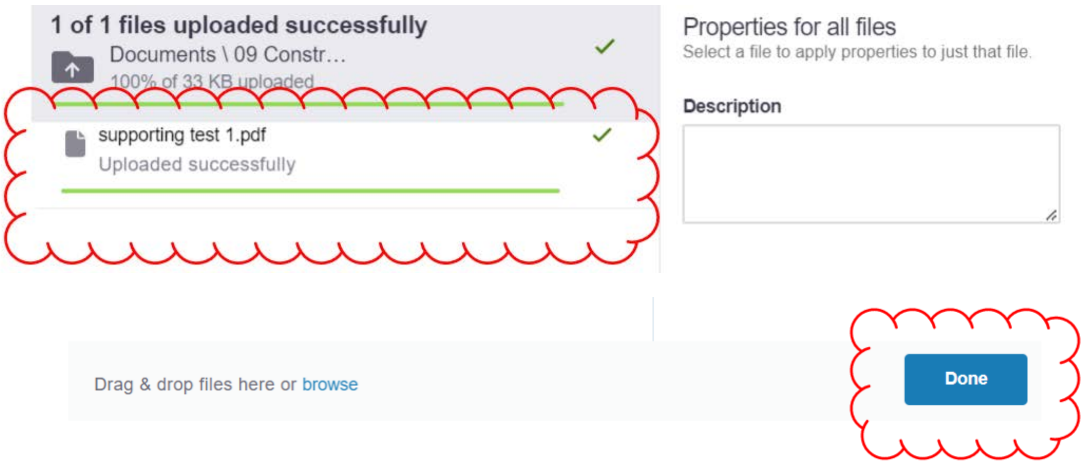
Then click "Browse".



Select the file(s) you wish to upload and click "Open".



If it worked properly, you should see the words “Uploaded successfully” under the filename . Click “Done” after the file has been uploaded.



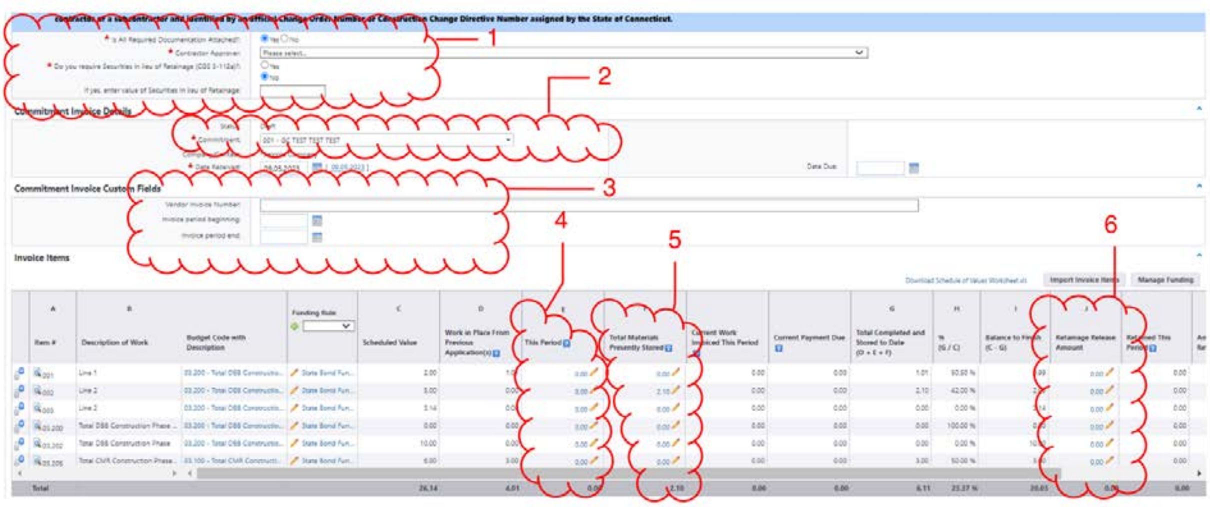
The uploaded document should then appear in the Documents tab. Also note the number in parentheses next to the “Documents” tab title, indicating the number of uploaded files.

Complete the rest of the Payment Application Form as follows:

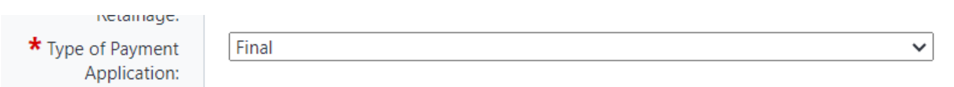
1. First group of questions after the blue instructions area.
    a. Ensure that all required documentation is attached, as described above, and then acknowledge that it is in the field here.
    b. Select who the contractor’s approver is in that field. This is the person whose name will appear in the signature block on the PDF copy of the Application and Certification for Payment, signing on behalf of the contractor.
    c. Indicate whether securities in lieu of retainage is being used and, if so, the amount.
2. Select the correct commitment for the vendor. Take care to select the correct commitment if the vendor has more than one on the project. Once selected, note that the “Invoice Items” part of the form populates.
3. Enter the vendor’s own invoice number and the beginning and end dates of the period being invoiced. This information is required.
4. Click on the “0.00” or pencil icon in the “This Period” column and enter the amount of the current invoice in each line.
5. If stored materials are being used, update each relevant row with the amount of current stored materials as of this Payment Application. In subsequent Payment Applications, when those amounts

are to be used, reduce this amount and add the amount reduced to the amount billed in that Payment Application under This Period for that row.

6. If there is any retainage release for this Payment Application, enter the amount released for each row under Retainage Release Amount. (If there is a need to change retainage percentages, please communicate that to the DAS Project Manager.)



(NEW as of April 10, 2024) The Payment Application process now includes a new question, asking the "Type" of Payment Application. This question will, by default, be set to "Progress". It can be set to "Substantial Completion" or "Final". "Final" is only selected if the Payment Application was initiated by a 7990 Project Closeout process instance. The GC/CMR users are referred to Section 19F for this procedure.



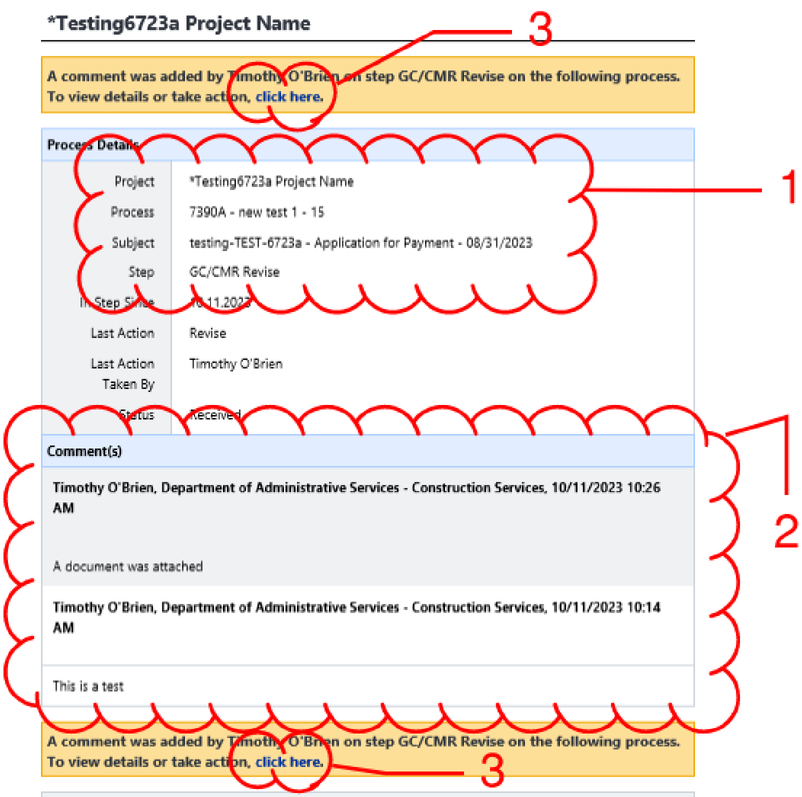
When the invoice form is correct, click "Submit" to submit the invoice into the workflow for review. If "Substantial Completion" was selected as a "Type", refer to Section 19E for the next step. In the case of final payment applications, ensure that "Final" was selected as a "Type" and refer to Section 19F for the next step.

The "Save Draft" button is also available to save the form as a draft to return to later.

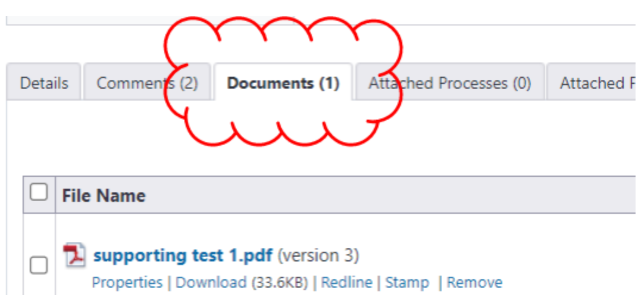
19A.03 Payment Application Form Returned for Revision

A payment application may be returned for revision. If the payment application is returned, the Actor having submitted the application will receive an email notification that the application has been returned for revision. The email will appear as follows and include the following information:

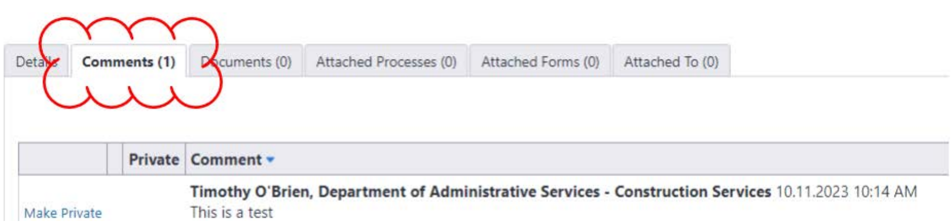
1. Process Details show the project, process type the notice concerns and the step the workflow is presently in, as of the notification.
2. The Comments section has comments from the workflow and other information.
3. There are links, top and bottom. Clicking on the link, of you are logged into e-Builder, will open the process instance pop-up.



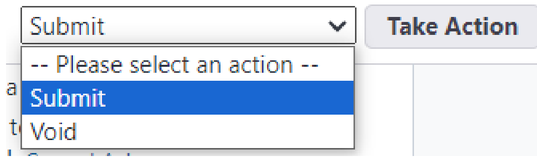
Comments explaining the reasons for the return information on the actions needed may be included in the Documents tab:



Or the Comments tab:



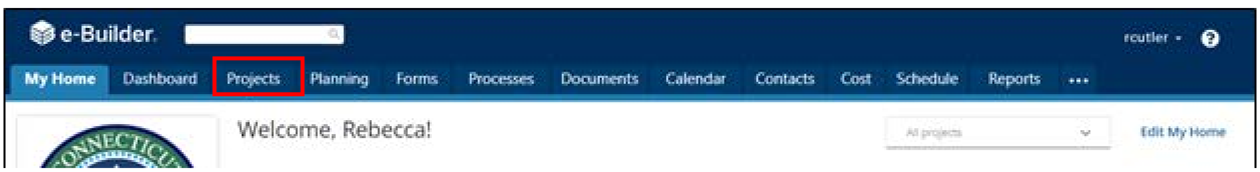
Make the needed changes and resubmit the application by selecting “Submit” from the action menu on the top or bottom of the form and clicking “Take Action”. There is also an option to void the Payment Application.



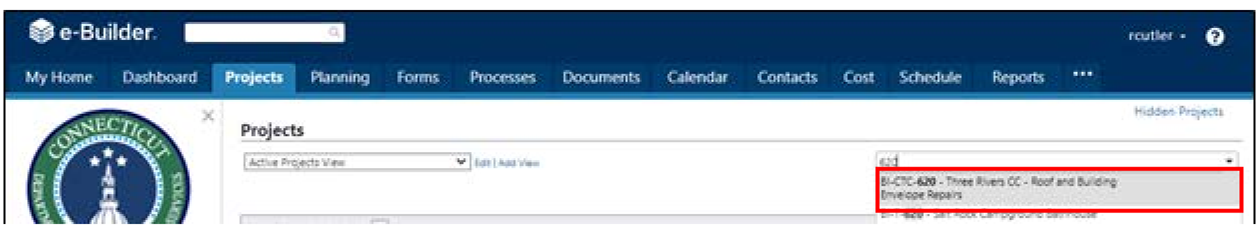
19B CA Users

19B.01 Instructions for the CA for Review and Certification of Payment Applications:

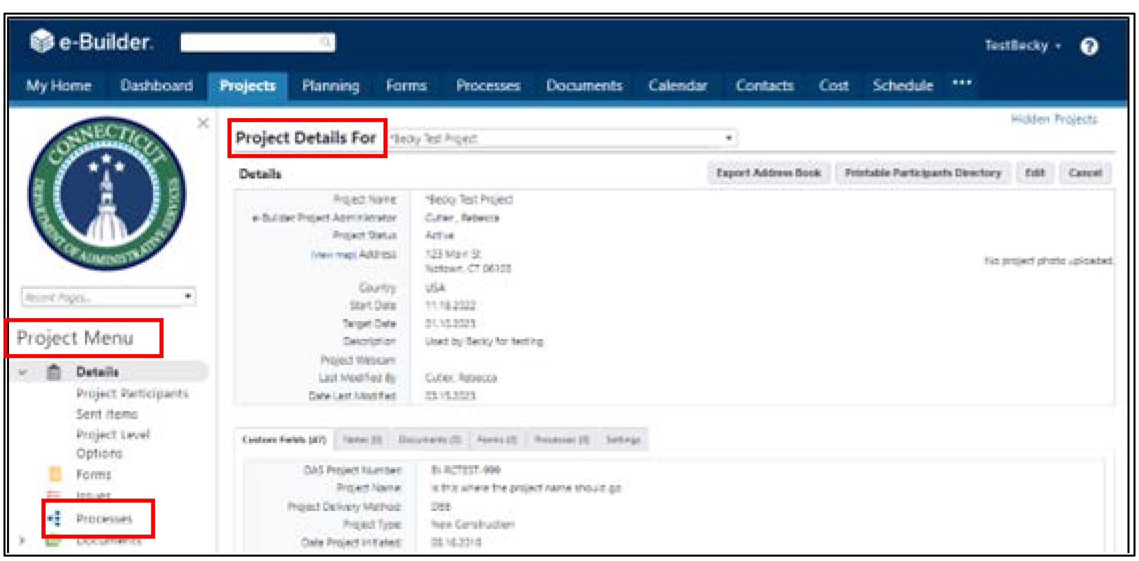
Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.

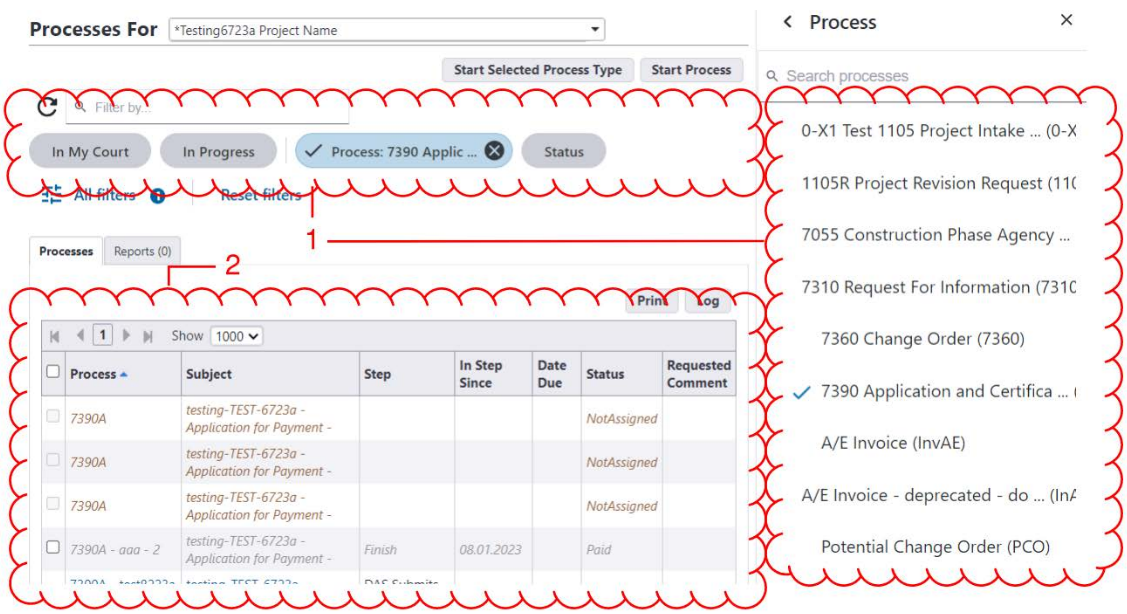


The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.

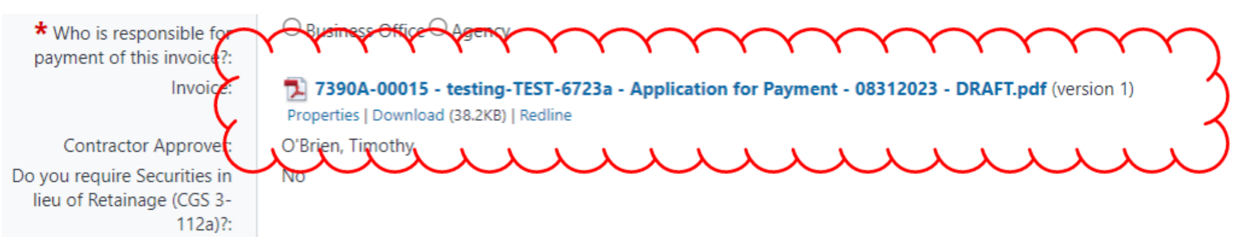


Change the Process filter settings to find the process instances you are looking for.

1. Select "7390 Application and Certification for Payment" from the "Search Processes" dropdown menu. Select one or more of the following from the "Filter by" dropdown menu: "All Processes", "Draft", "Open", or "Finish". "All Processes" will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

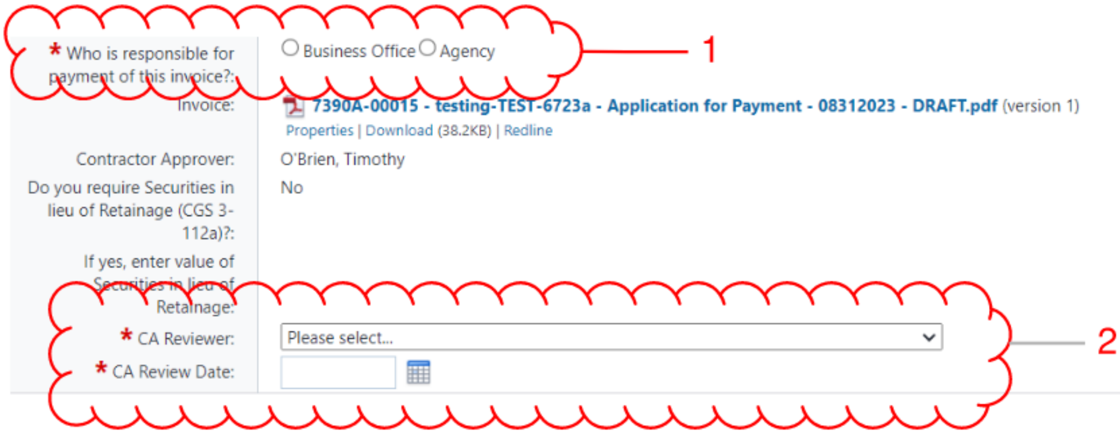


Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the "Details tab" and then click on the link to the PDF, as shown below:

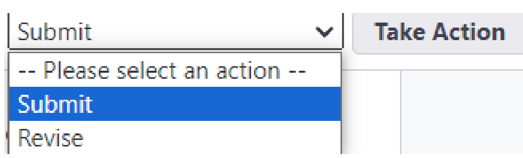


After reviewing the pencil requisition, return to the “Details” tab and:

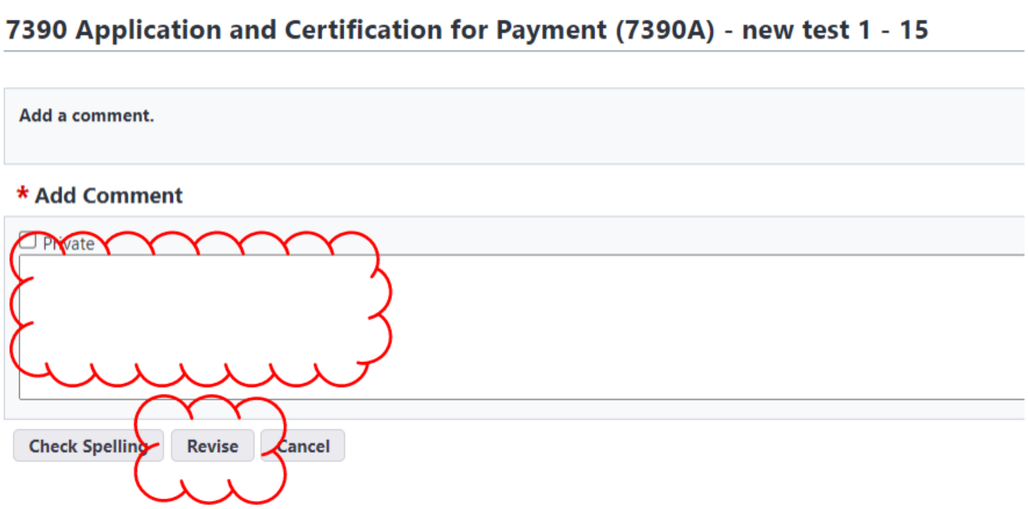
1. Select whether the payment is to be issued by the DAS Business Office or by the client agency. If there is any question about this, consult with the DAS Project Manager.
2. The CA should then select their firm name from the “CA Reviewer” dropdown list and the input the date of approval.



At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. “Submit” will send the item to the A/E for review. “Revise” will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the “Take Action" button.

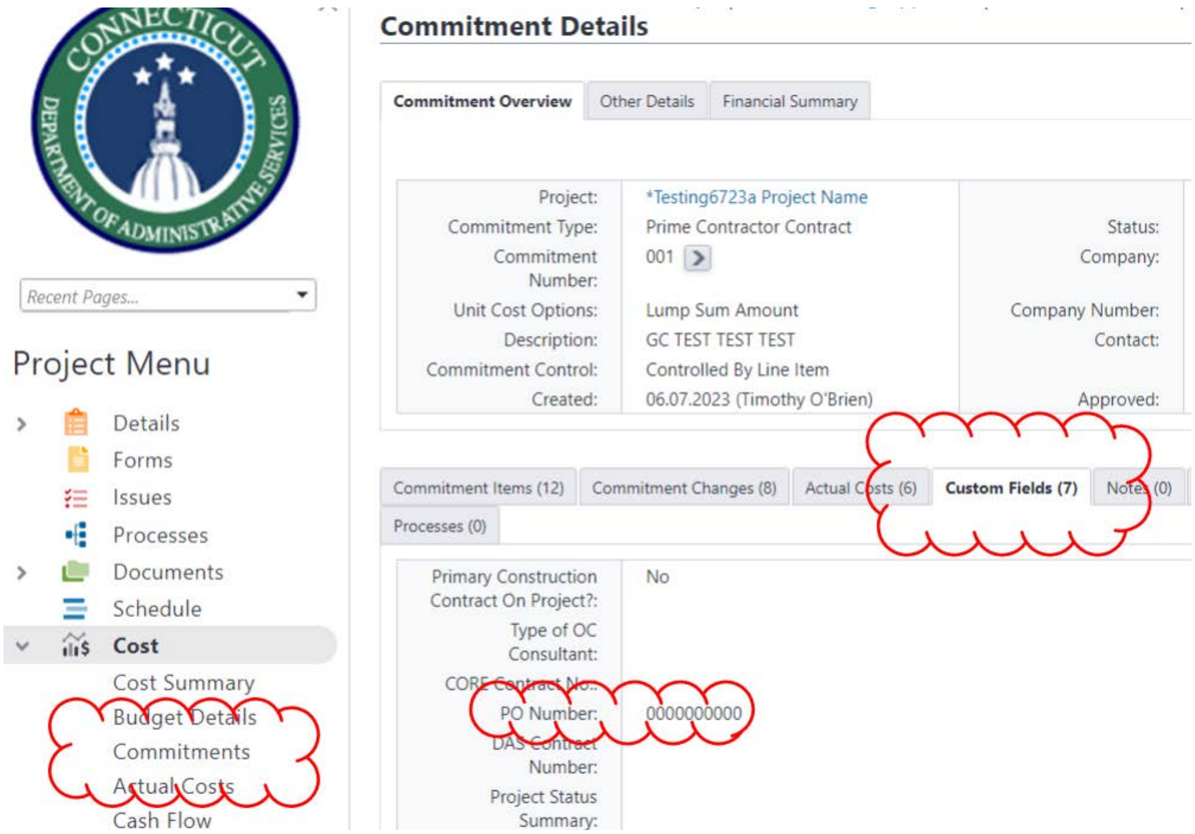


If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.



19B.02 Other Items for Verification

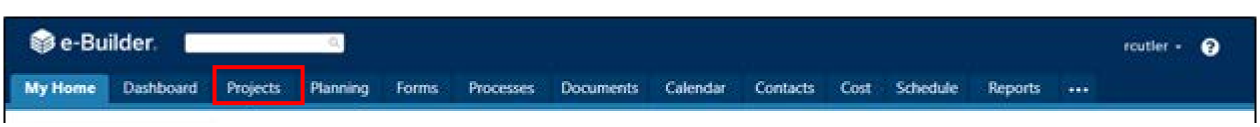
Under Cost > Commitments, in the Custom Fields tab of each commitment, please check to ensure that the PO Number field is the correct purchase order number, especially for DAS Business Office invoicing. (The number “0000000000” is a placeholder and is not an actual PO Number.) This is important to ensure that the DAS Business Office is able to process payments without them being held up by uncertainly about the what purchase order to use for payment.



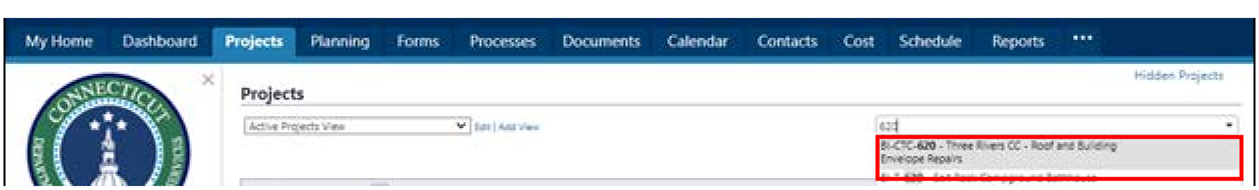
19C A/E Users

19C.01 Instructions for the A/E for Review and Certification of Payment Applications:

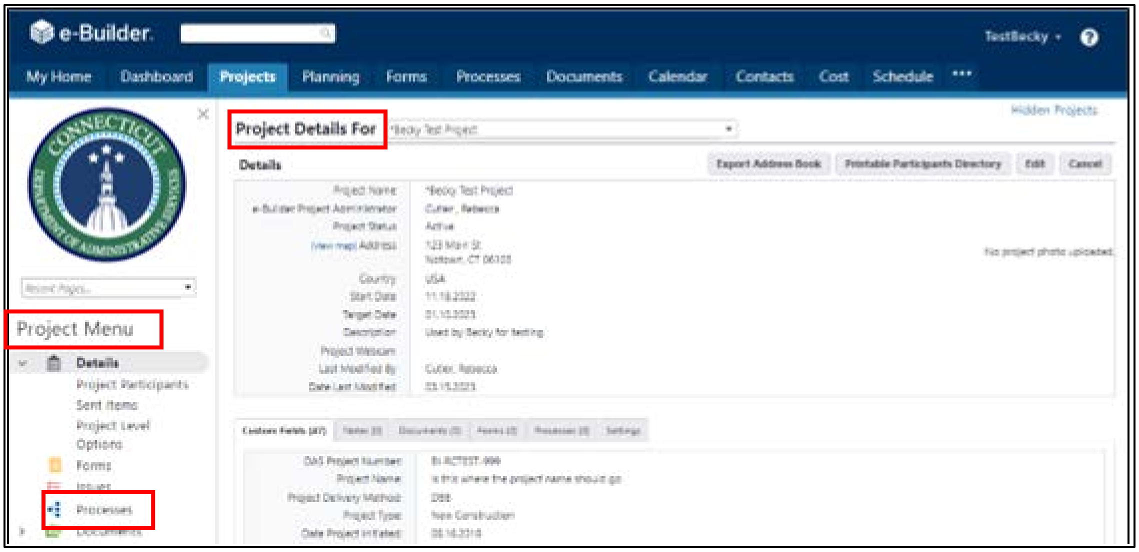
Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.

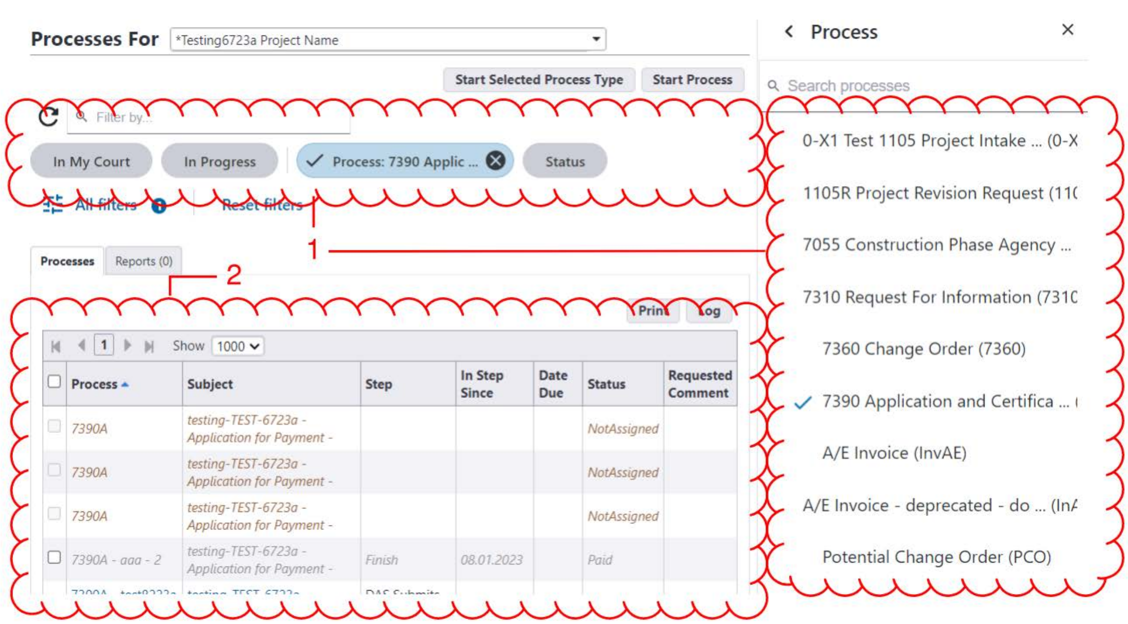


The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.

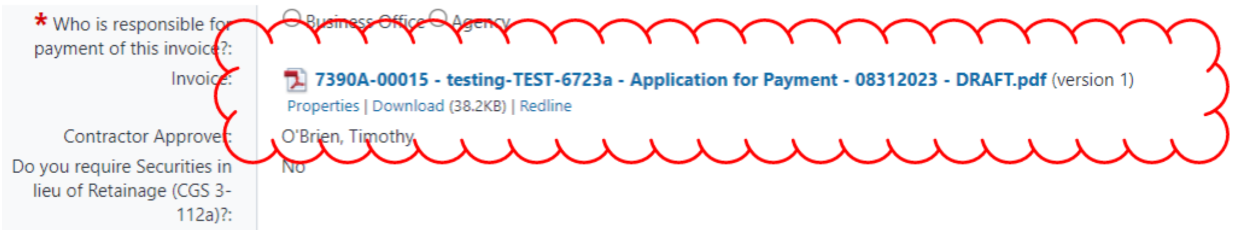


Change the Process filter settings to find the process instances you are looking for.

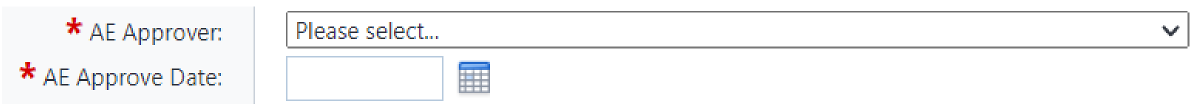
1. Select “7390 Application and Certification for Payment” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



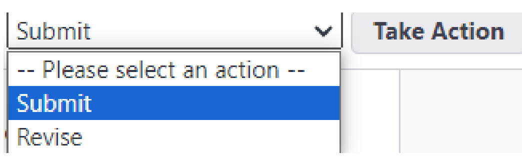
Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the “Details tab” and then click on the link to the PDF, as shown below:



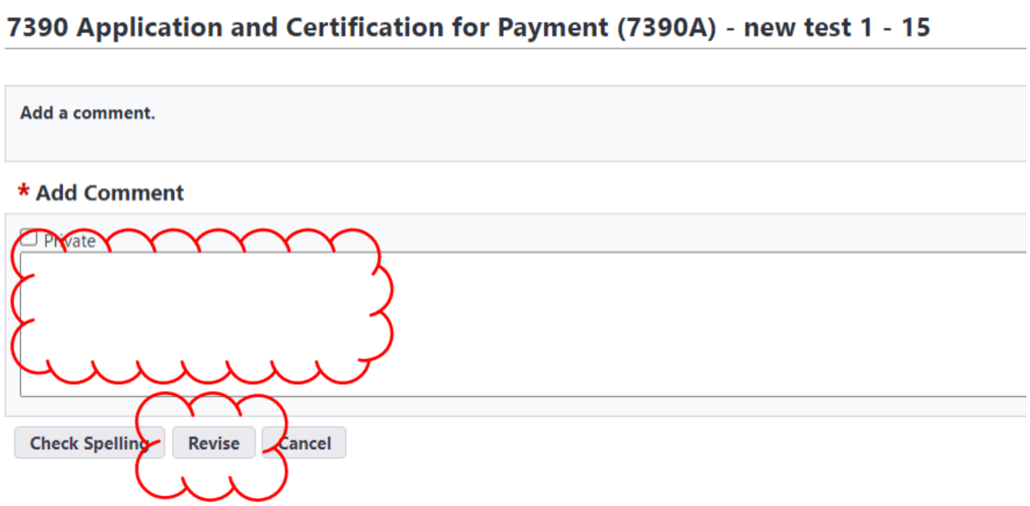
The A/E should then select their firm name from the “AE Approver” dropdown list and the input the date of approval.



At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. “Submit” will send the item to the A/E for review. “Revise” will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the “Take Action" button.



If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.

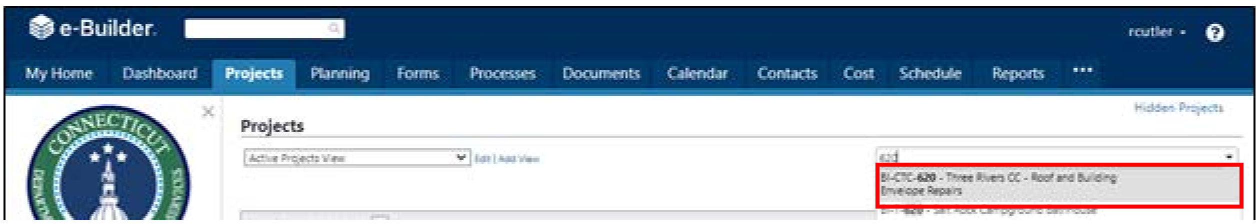


19D PM Users

19D.01 Instructions for the PM for Review and Certification of Payment Applications:

Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for “Projects”:

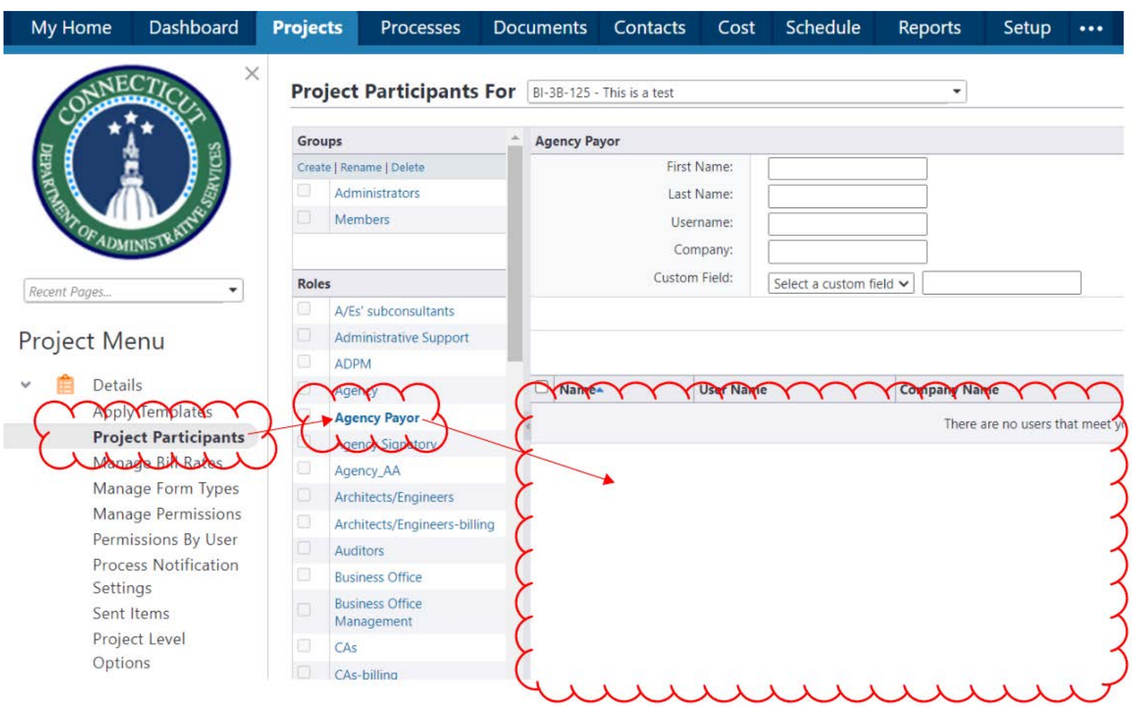
Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project.

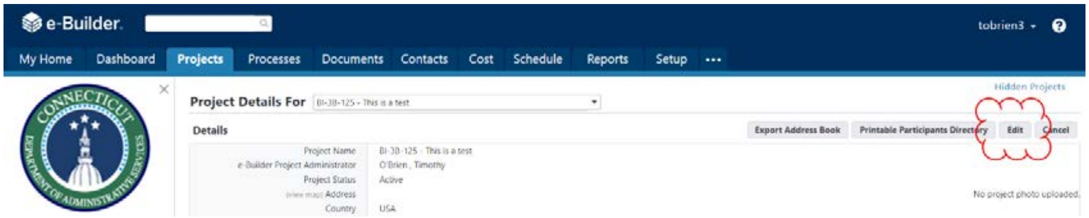
19D.02 Project set-up on Payment Applications whose costs are paid for by the Agency

If the Agency is directly responsible paying payment applications, the person who attends to the payment must be in the Agency Payor role. If that person is not in that role, please request that Construction Support Services (Tim O’Brien) place that person in that role.



If the payment will be made using CHEFA funds, proceed as follows:

1. At the top of the Project Details page, click “Edit”.

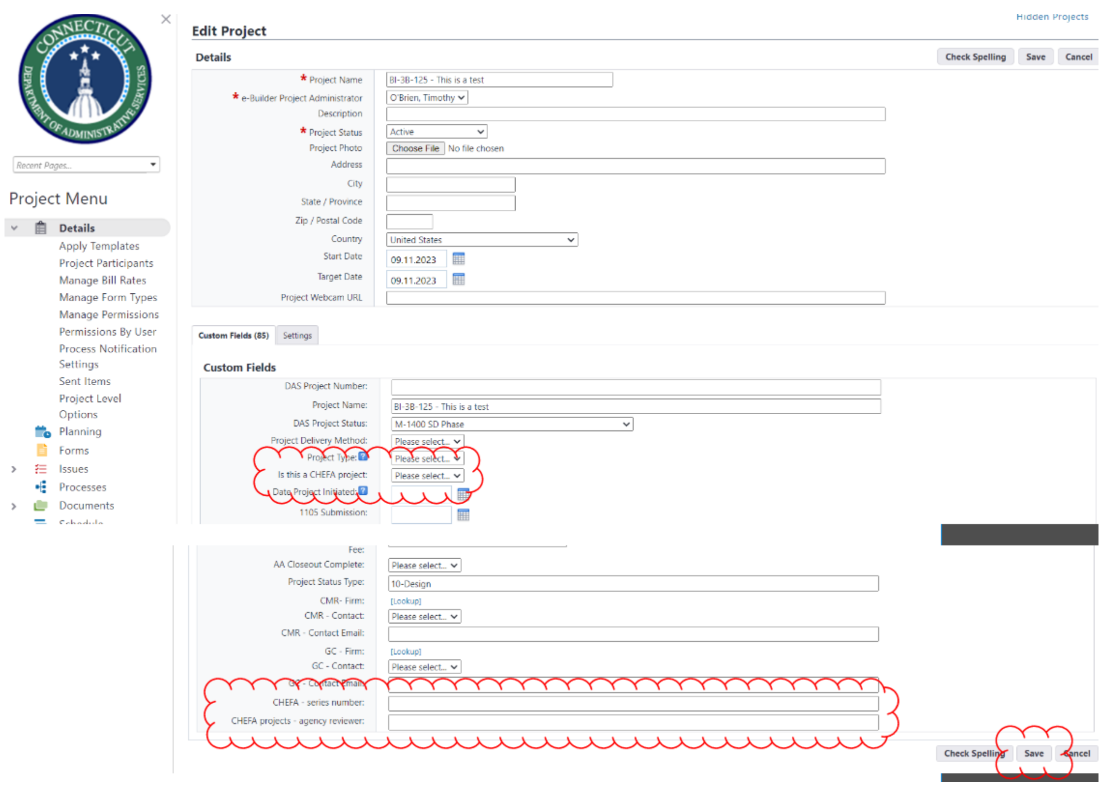


2. Select “Yes” on the line that asks, “Is this a CHEFA project.”

3. Enter the CHEFA series number for the Payment Application cover letter.

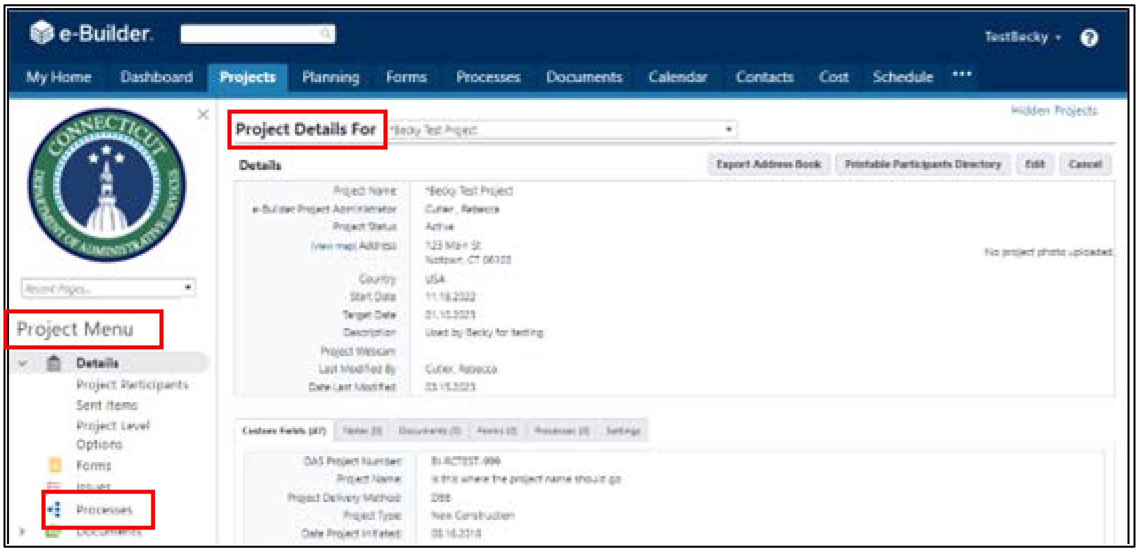
4. Enter the agency reviewer for the signature page on the cover letter.

5. Click “Save.”



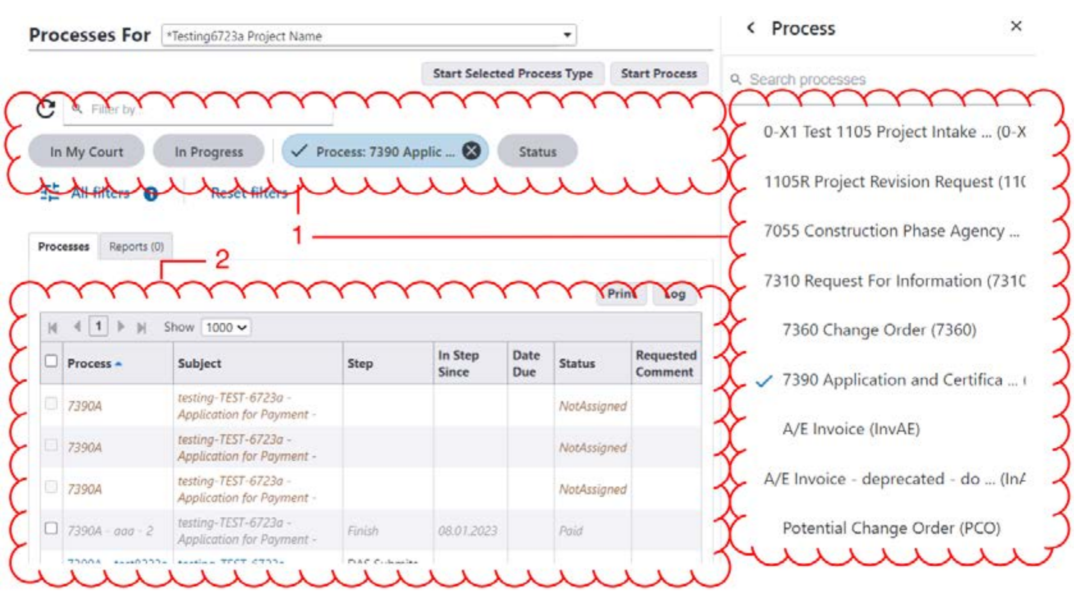
19D.03 Accessing the Process Instance

Under the “Project Menu” on the left, click on Processes to find project-specific processes.

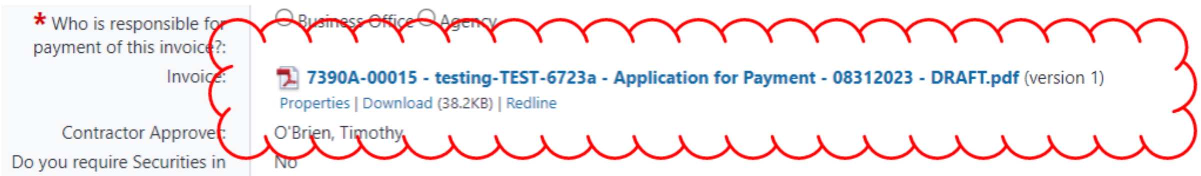


Change the Process filter settings to find the process instance you are looking for.

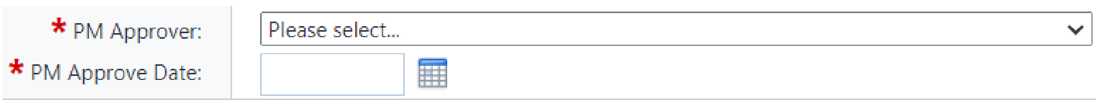
1. Select “7390 Application and Certification for Payment” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



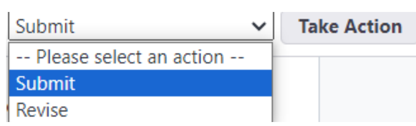
Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the "Details tab" and then click on the link to the PDF, as shown below:



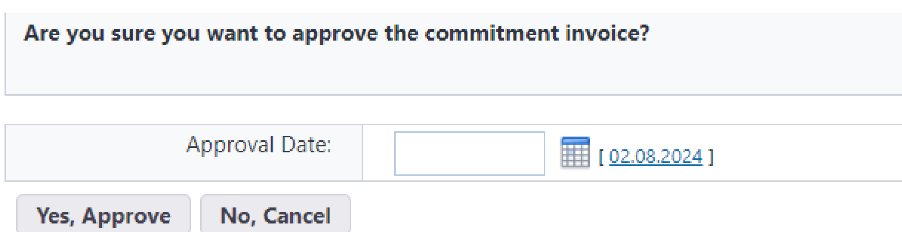
The PM should then select their firm name from the "PM Approver" dropdown list and the input the date of approval.



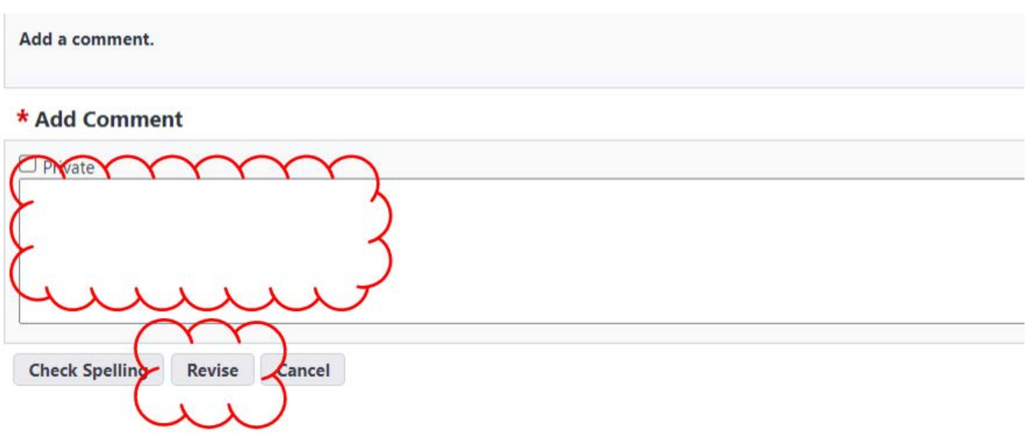
At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. "Submit" will send the item to the A/E for review. "Revise" will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the "Take Action" button.



The project manager will then be prompted to approve the payment for the project Cost part of e-Builder and enter the Approved date.



If "Revise" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Revise" to complete and send the comments.



19E Payment Application at Substantial Completion (Coming Soon)

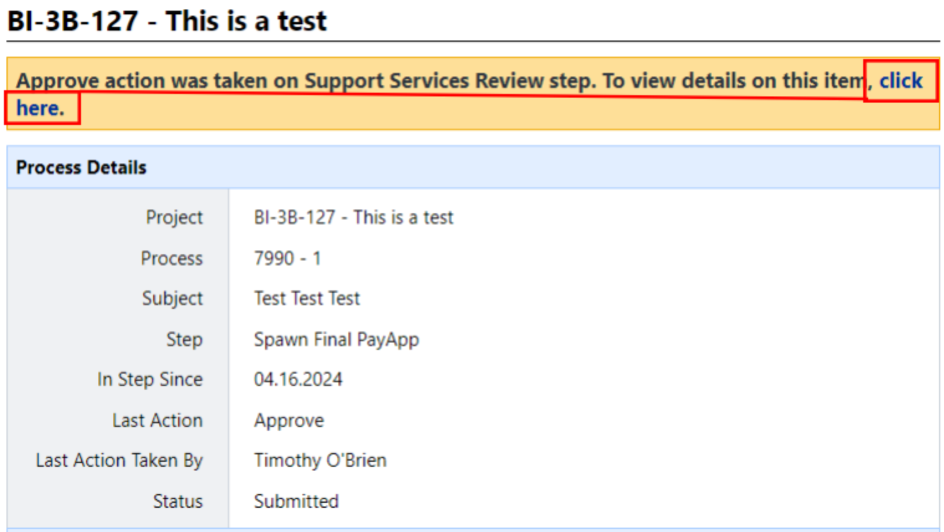
19E.01 Instructions for the Substantial Completion step:

19F Final Payment Application

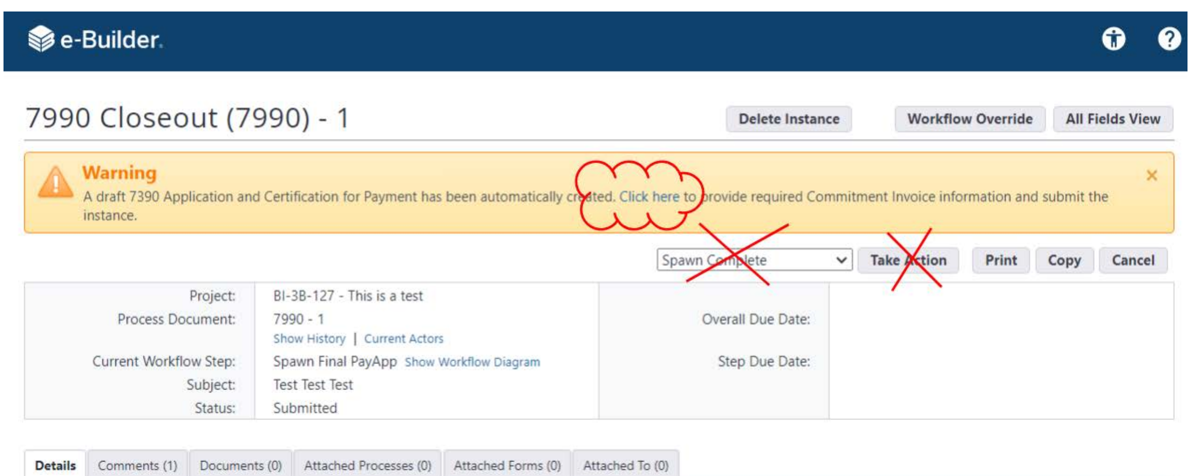
19F.01 Notification for the creation of a Final Payment Application

The GC/CMR will receive an email notification from eBuilder for action in the 7990 process to proceed with processing the Final Payment Application.

To access the project process, the GC/CMR should click on the “Click Here” link provided in the email.



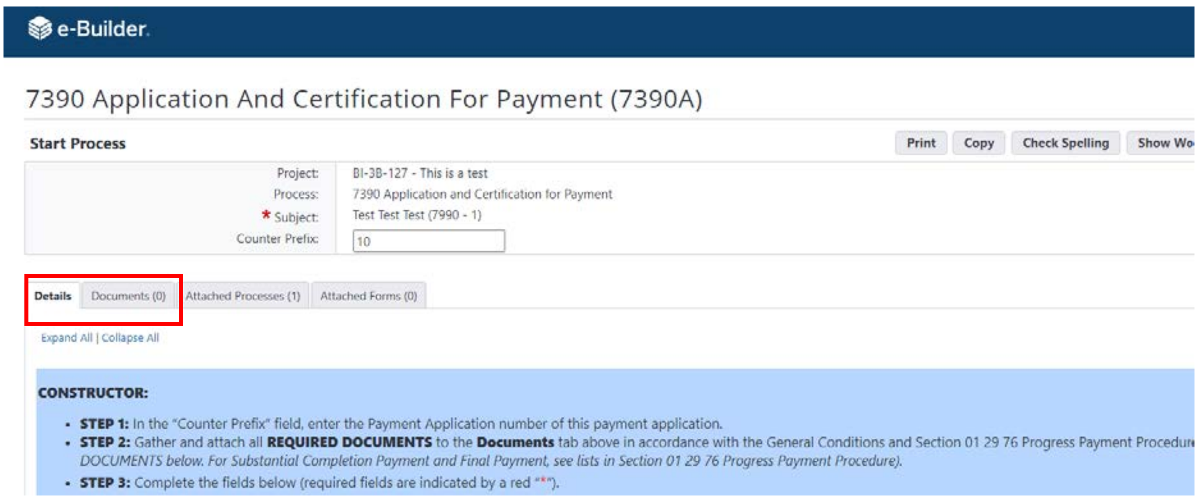
After opening the process instance, a warning prompt will appear. **Select the “Click here” link in the prompt, as shown below**, to proceed to initiate the Final Payment Application. **No other action should be taken on this page. DO NOT** interact where it says, “Spawn Complete”, or “Take Action.” Doing so will close out the Final Payment Application. This action cannot be undone.

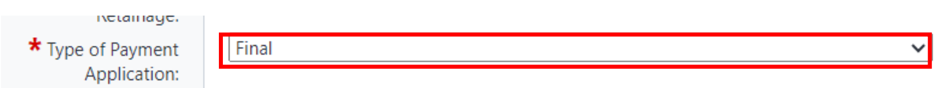


19F.02 Initiating the Final Payment Application in the new 7390 instance

After selecting the “Click here” link, a new “7390 Application and Certification for Payment” process instance will open.

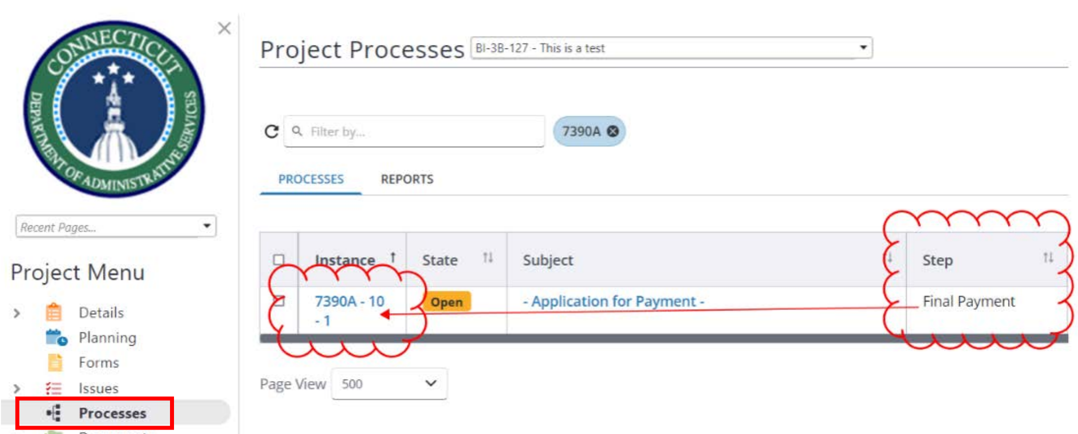
This is the final GC/CMR Payment Application for the project. The GC/CMR should click on the “Documents” tab and upload all required documents, then return to the “Details” tab to complete the 7390 Form. Refer to Section 19 - 7390 Application and Certification for Payment for instructions on completing Form 7390. Note however that this is the Final Payment Application, and the “Type of Payment Application” should be marked as “Final”. Upon completion of Form 7390, click “Submit”.



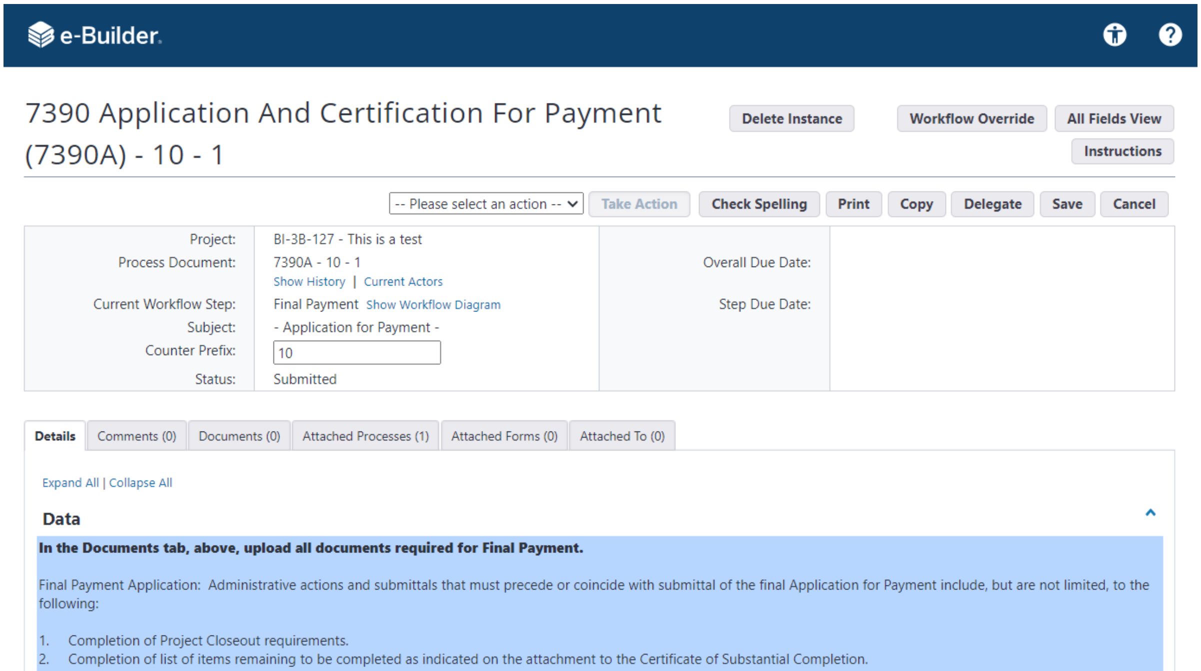


19F.03 Final Payment Application step

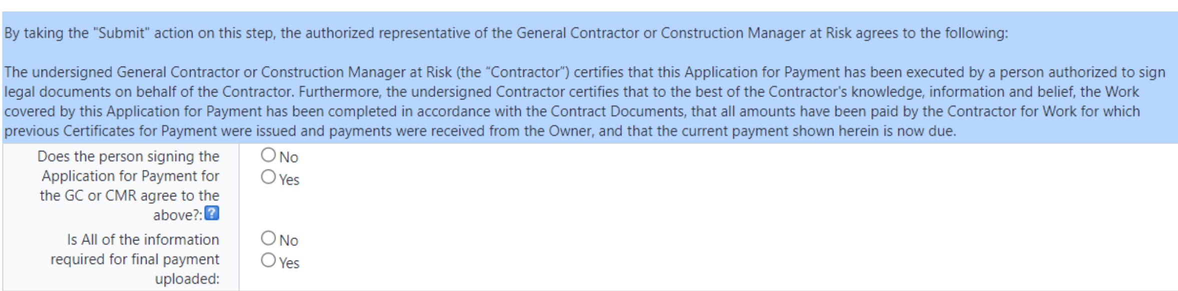
After clicking “Submit”, click on the “Processes” module for the project, under the Project Menu, to locate the 7390 Payment Application process instance which should be in its “Final Payment” step. Click on this instance’s number or subject to open it.



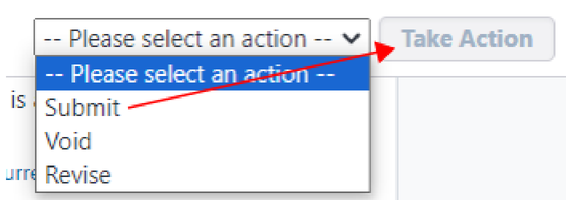
In this step, upload all of the documentation required for Final Payment Application in the “Documents” tab of the process instance.



The GC/CMR then indicates the following:



When complete, at the top or bottom of the form, the GC/CMR clicks, “Please select an action”, to choose the workflow action desired.



The options include:

- "Submit" to submit the Payment Application for the creation of a PDF draft to the CA in the Payment Application workflow, as indicated in 0175 e-Builder Guidance Manual, Section 19A.
- "Void" to void the Payment Application instance. This action is permanent and cannot be undone.
- "Revise" to send the Payment Application instance back to the GC/CMR at the workflow step that allows the GC/CMR to further edit it and make corrections.

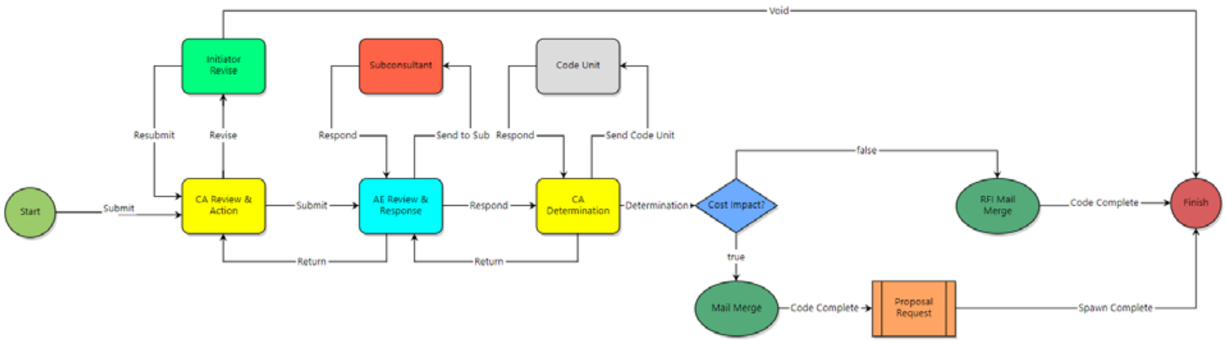
After making a selection, click the "Take Action" button to forward the application process to the next respective user.

As with other processes in e-Builder, a "Save" button is also available to allow the user to save the process instance without clicking "Take Action" yet, to return later for further edit.

19F.04 7390 Process

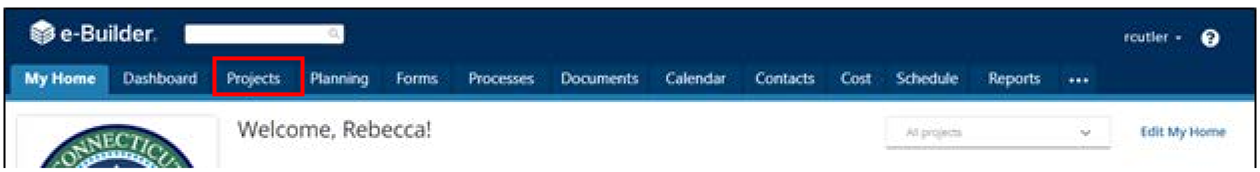
After the GC/CMR user has clicked "Submit" in 19F.03, the 7390 will be sent to the CA for further action. Please refer to Section 19B – CA User for CA instructions. If the CA sends the Payment Application back to the GC/CMR for revisions, the GC/CMR's workflow may include a return to the Final Payment Application step.

Section 20: Request for Information

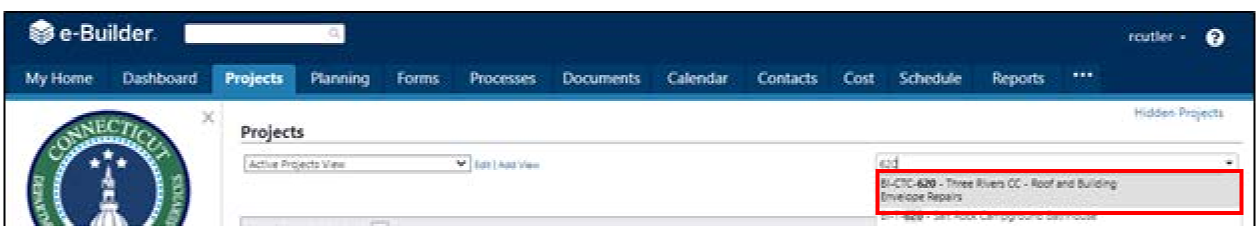


20.01 GC/CMR RFI Submission - Accessing the Process

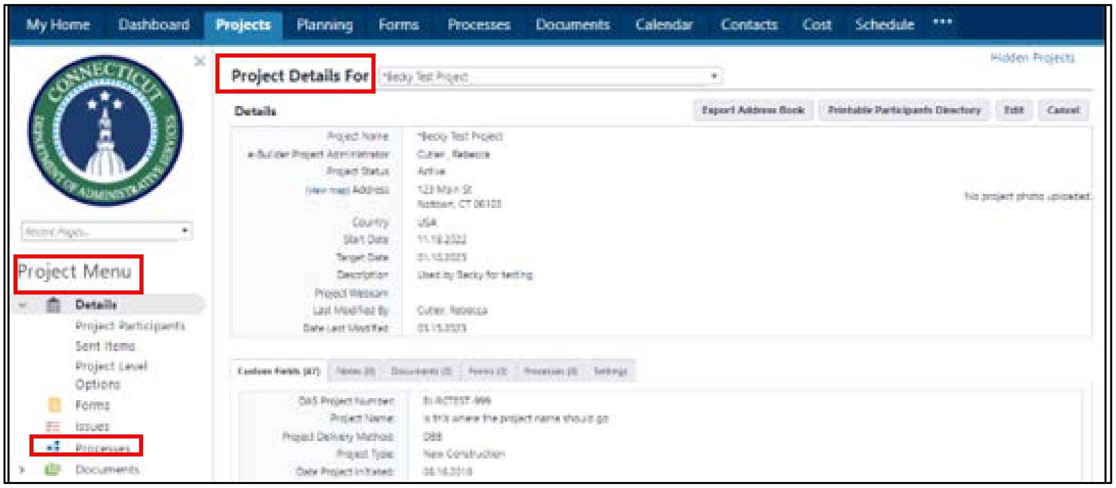
Log in to e-Builder: https://gov.e-builder.net. On your homepage, find your project by clicking on the top tab for "Projects":



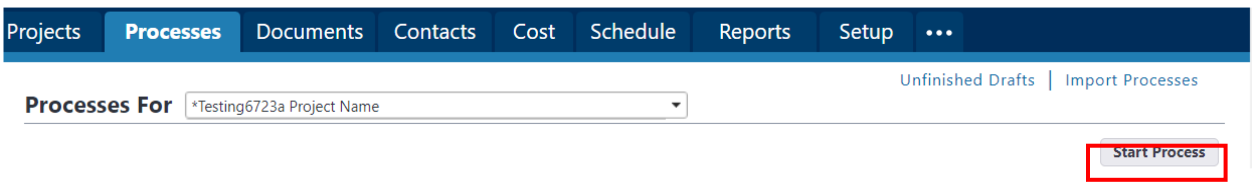
Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.



The "Project Details" page is your home page for your project. Under the "Project Menu" on the left, click on Processes to find project-specific processes.

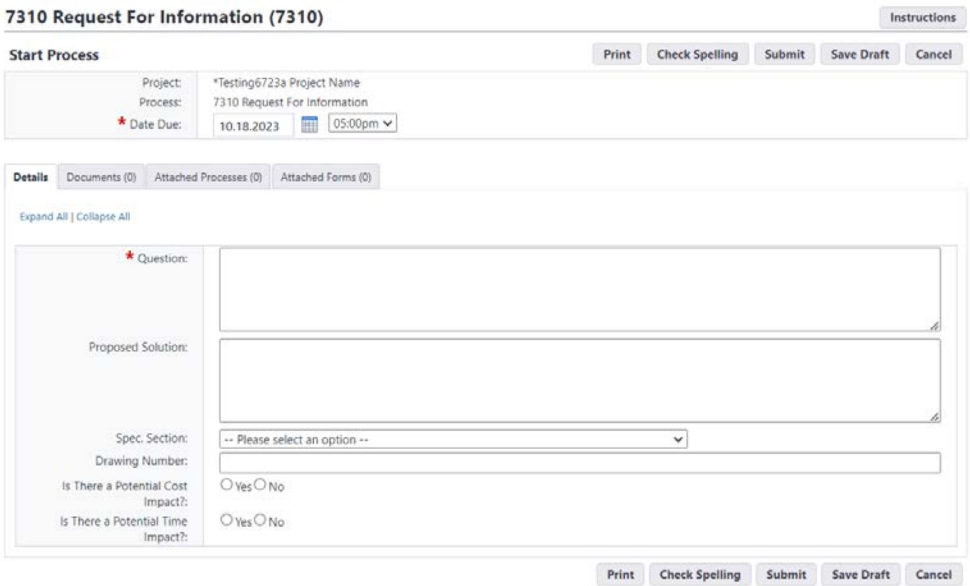


Click on “Start Process” to find and start a process.

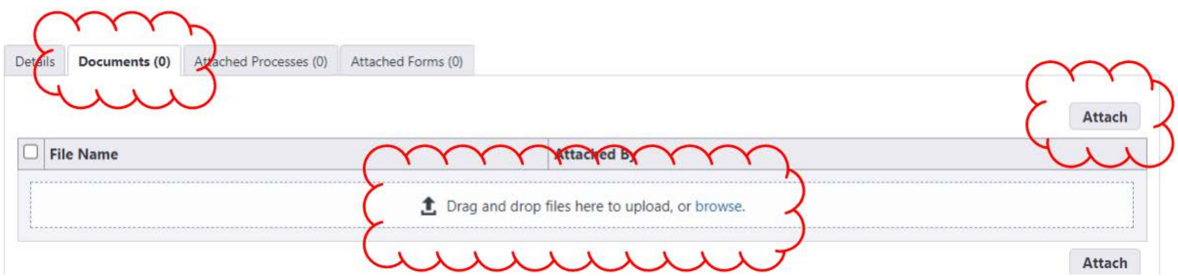


A pop up will appear with processes that the user is able to initiate. Select “7310 Request For Information (7310)” from the list of available process types.

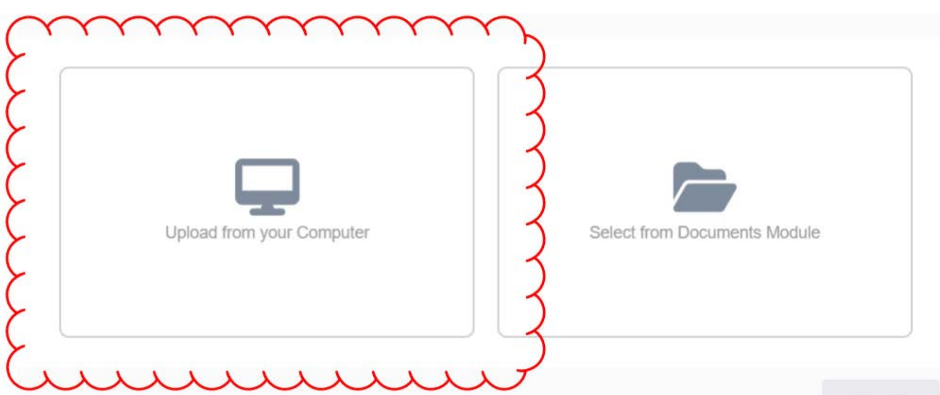
That causes the pop-up to change into the RFI form. Complete the answers to the questions asked in the form.



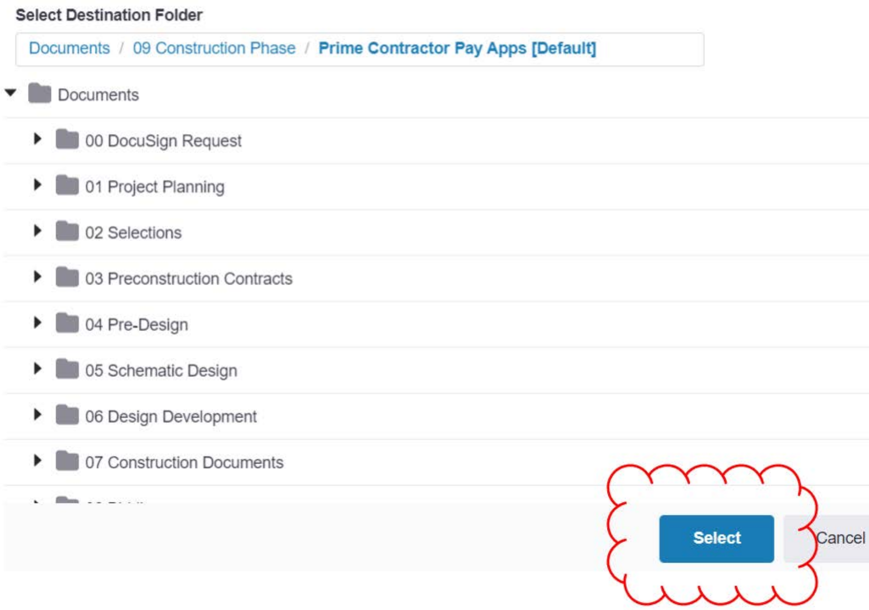
Click on the “Documents” tab header to open the tab. Upload supporting documents for the RFI to the Documents tab by either using the “drag-and-drop” feature or by clicking the “Attach” button.



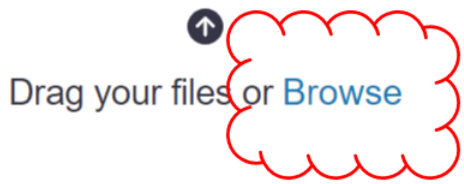
If the “Attach” button is clicked, a pop-up will appear. Click the “Upload from your Computer” button to locate a locally stored document.



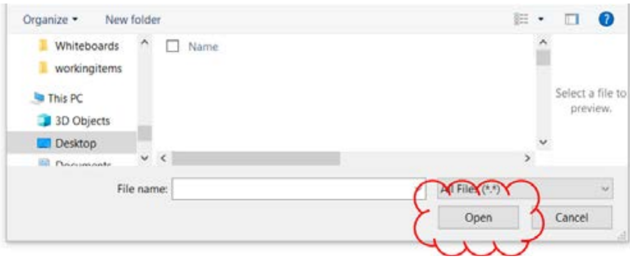
Then, click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the supporting documents. If applicable, an alternate folder can be selected.



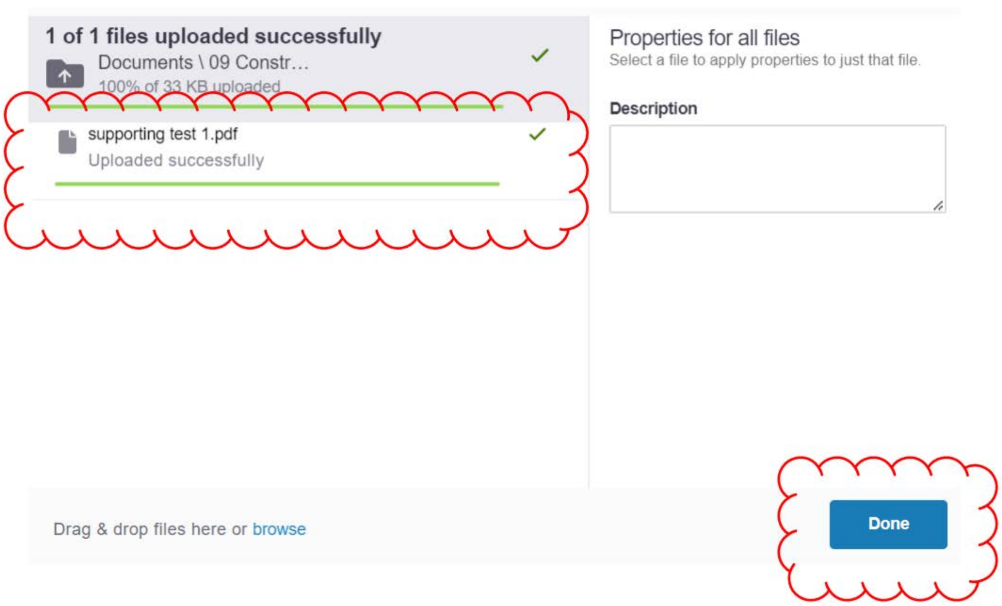
Then click “Browse”.



Select the file(s) you wish to upload and click “Open”.



If it worked properly, you should see a green line under where the filename is. Then click “Done.”

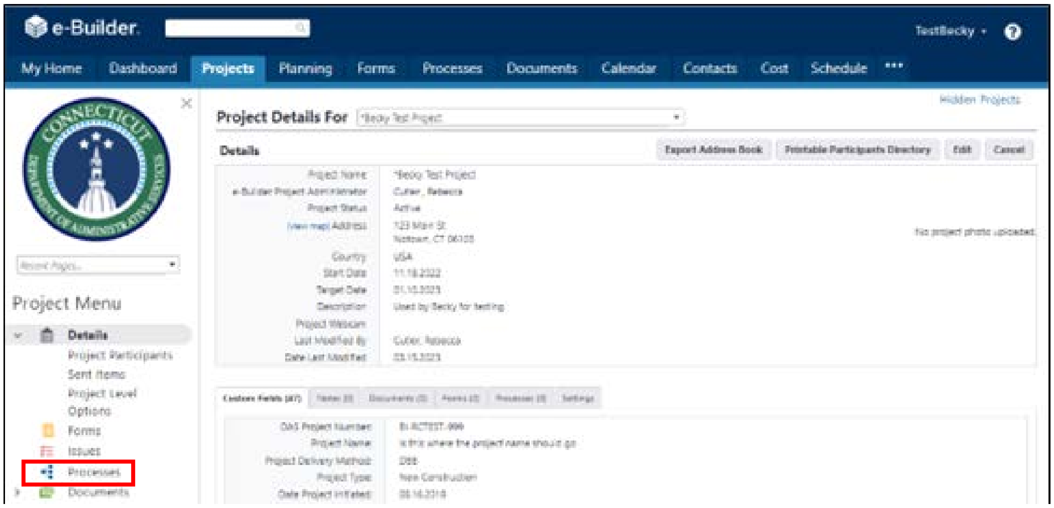


The uploaded document should then appear in the Documents tab. Also note the number in parentheses next to the “Documents” tab title, indicating the number of uploaded files.

If the user would like to save the RFI, and keep it in draft form for future editing, the “Save Draft” button is available.

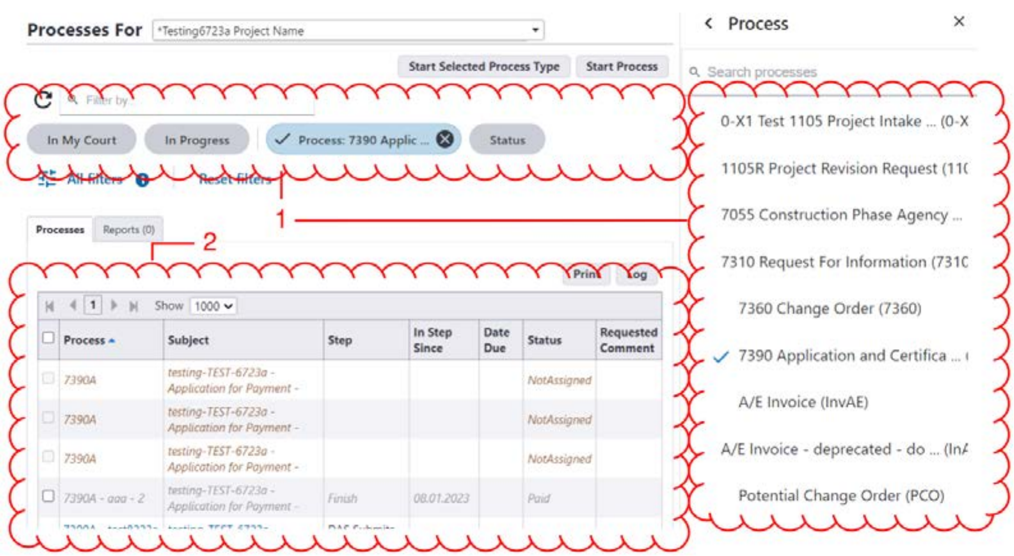
The RFI is saved as a type of e-Builder "Process instance".

To locate the draft Process instance that is the draft RFI, go back into the project, and open the Processes module within the project.



Proceed as follows to change the Process filter settings to find the process instance you are looking for.

1. Select "7310 Request for Information (7310)" from the "Search Processes" dropdown menu. Select one or more of the following from the "Filter by" dropdown menu: "All Processes", "Draft", "Open", or "Finish". "All Processes" will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

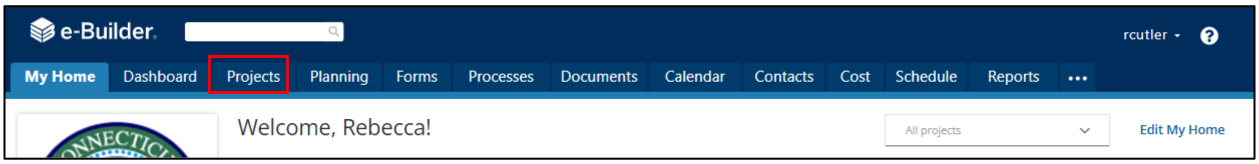


When the user is ready to submit the RFI, click "Submit". This will cause the RFI to be sent into workflow.

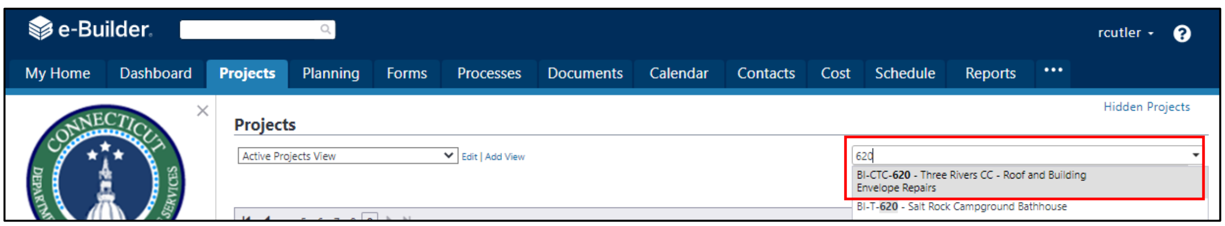
20.02 CA RFI Review - Accessing the Process

The CA will receive an email notification from eBuilder that an RFI is pending. To access the pending RFI, the CA can either click on the link in the email and the browser instance will appear as a pop-up; or

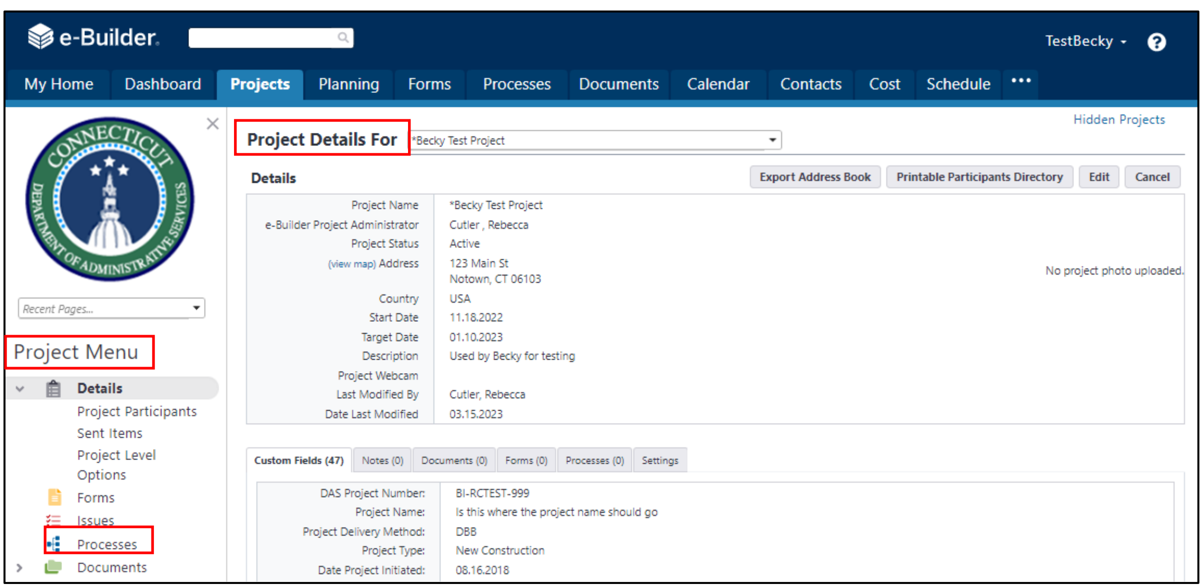
the CA can log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f and click on the "Projects" tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.



The "Project Details" page is your home page for your project. (Click "Edit" to edit info.). Under the "Project Menu" on the left, click on Processes to find project-specific processes.

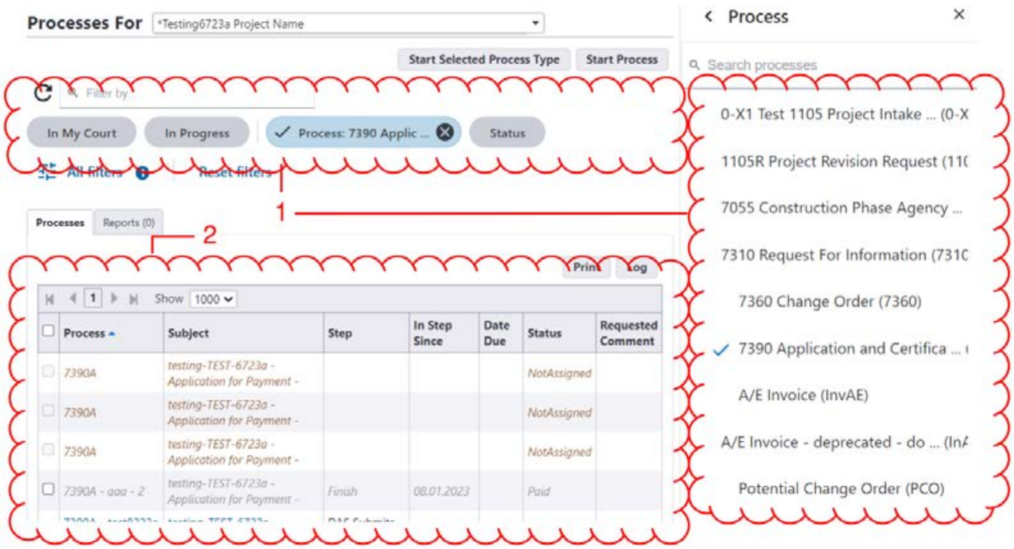


Proceed as follows to change the Process filter settings to find the process instance you are looking for:

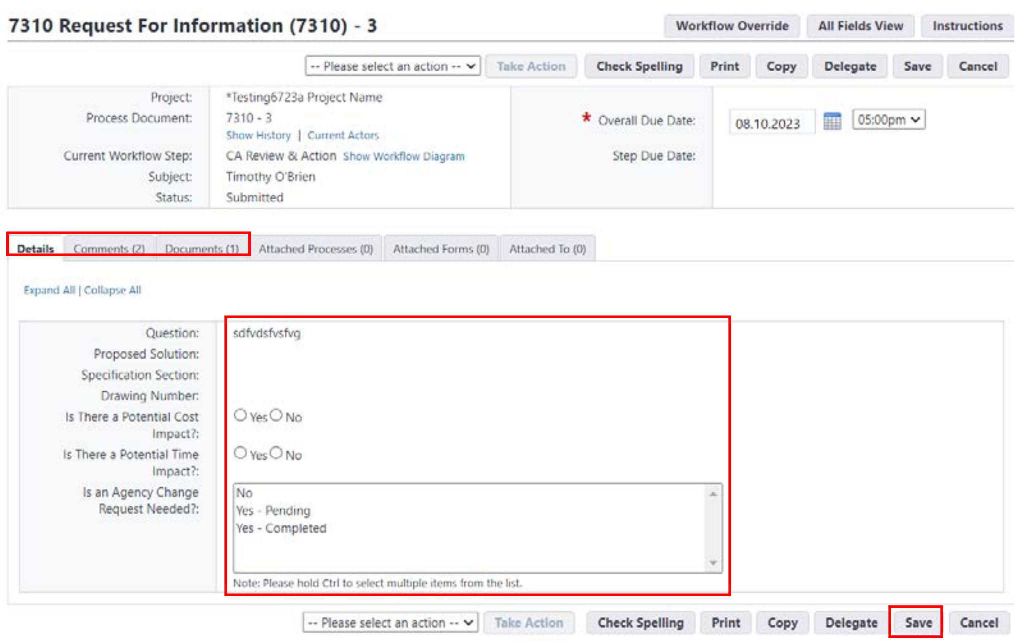
1. Select "7310 Request for Information (7310)" from the "Search Processes" dropdown menu. Select one or more of the following from the "Filter by" dropdown menu: "All Processes", "Draft", "Open",

or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.

2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

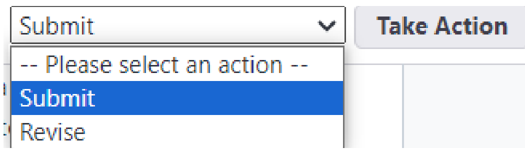


Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions. The CA has the option to “Save” its edits and return for further edits, if it so chooses, by clicking the “Save” button.



At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take. “Submit” will forward the RFI to the A/E for review. “Revise” will return the

RFI to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the "Take Action" button to complete the action.

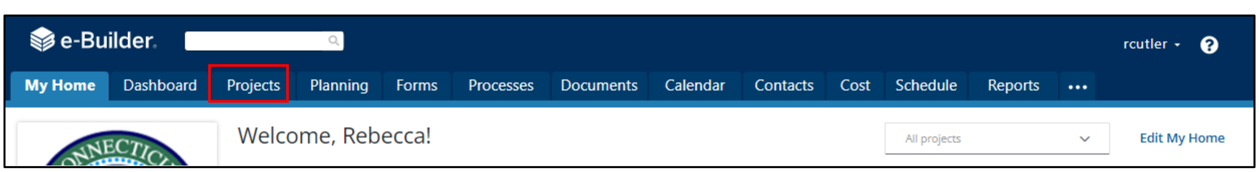


If "Revise" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Revise" to complete and send the comments.

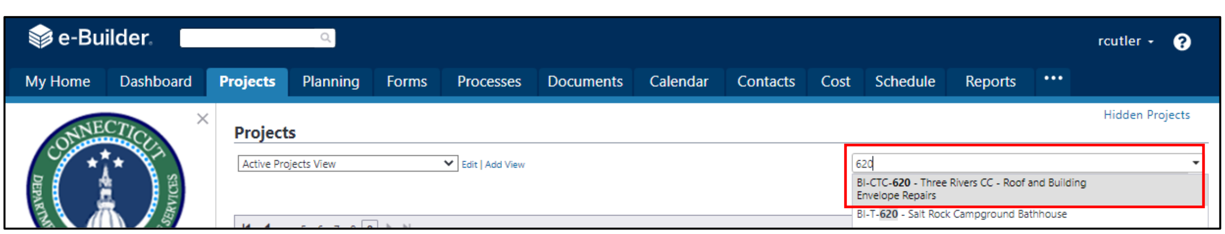
20.03 A/E RFI Review - Accessing the Process

The A/E will receive an email notification from eBuilder that an RFI is pending. To access the pending RFI, the A/E can either click on the link in the email and the browser instance will appear as a pop-up; or

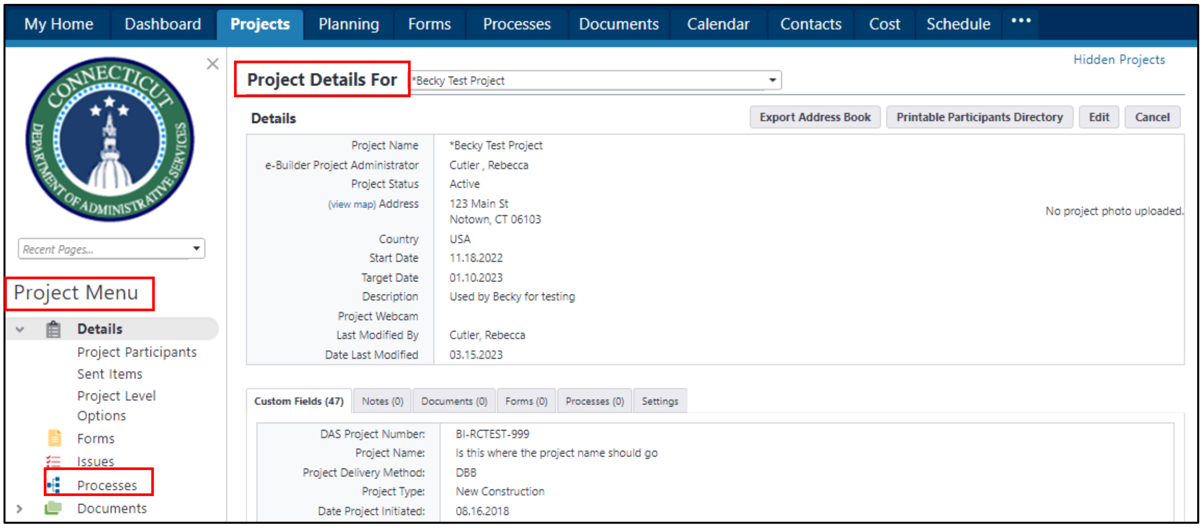
the A/E can log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f and click on the "Projects" tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.

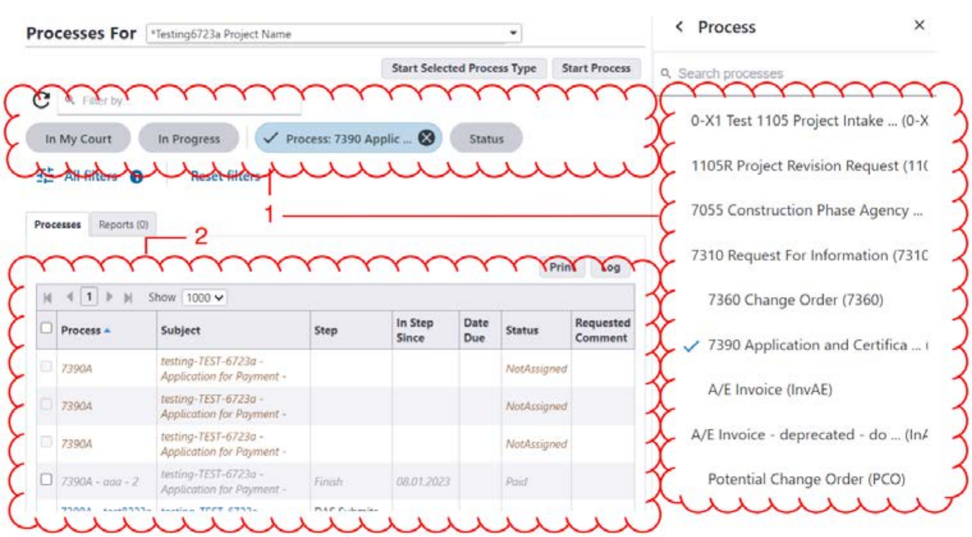


The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.

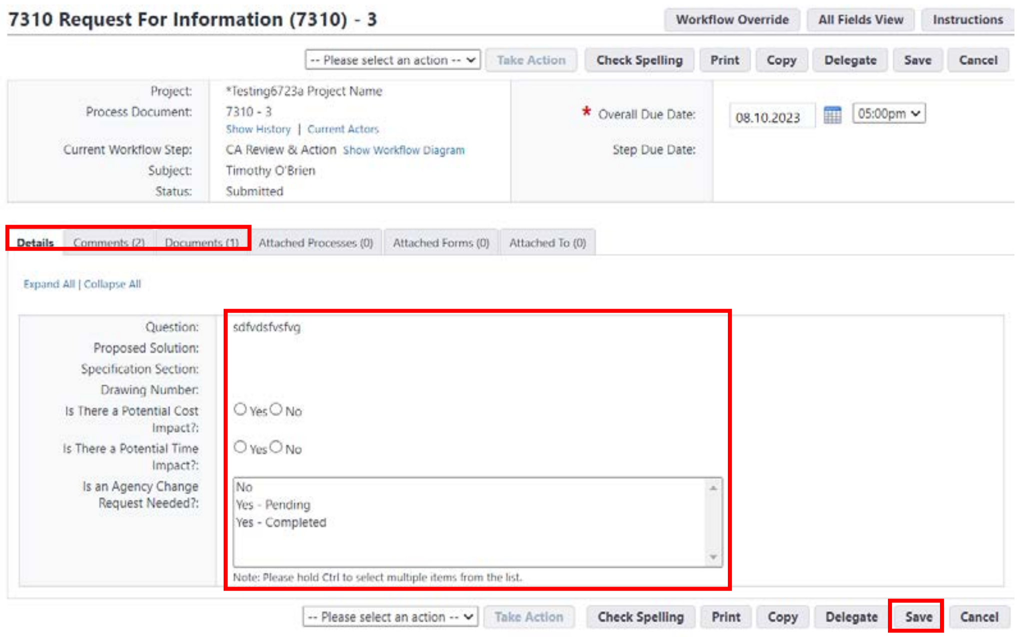


Proceed as follows to change the Process filter settings to find the process instance you are looking for:

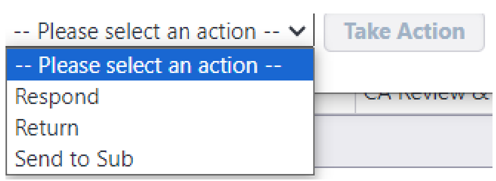
1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



Once the process instance opens, the A/E can review all of the information entered, including the files uploaded to the "Documents" tab, and any comments made regarding the RFI under the "Comments" tab. The A/E will then return to the "Details" tab and provide a response to the editable questions. The A/E has the option to "Save" its edits and return for further edits, if it so chooses, by clicking the "Save" button.



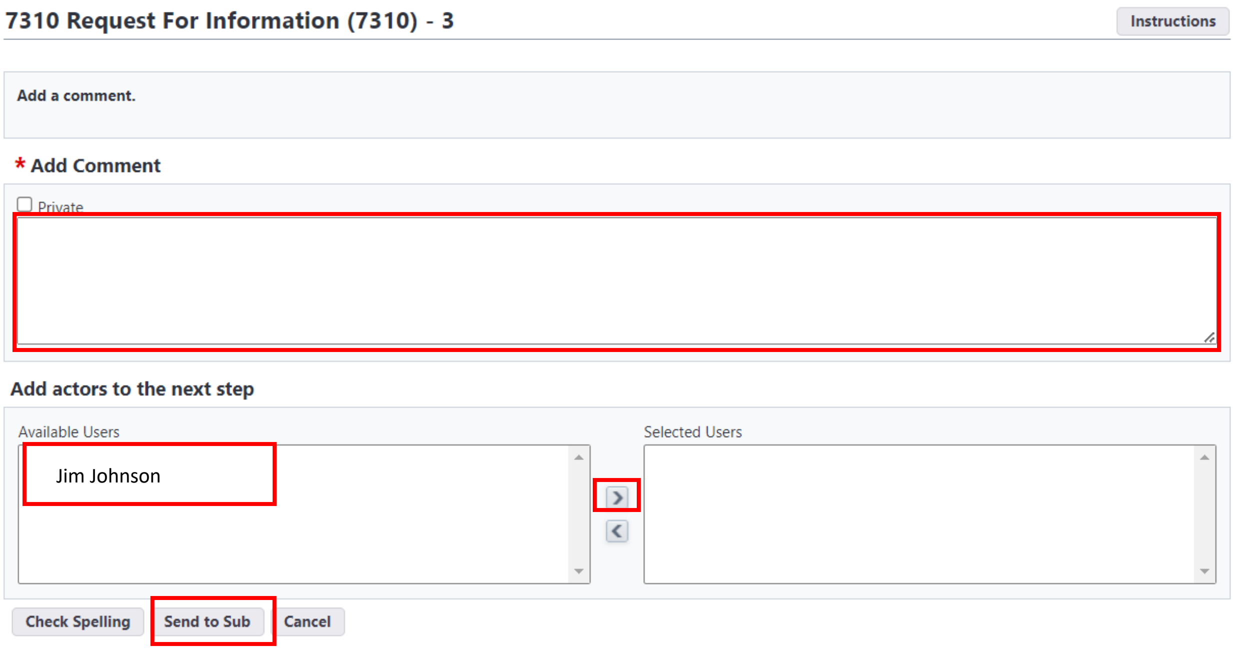
At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take. "Respond" will forward the RFI to for final determination. "Return" will return the RFI to the CA for any corrections that are needed. "Send to Sub" will forward the RFI to the sub for review and comment. Once the action to be taken is selected, click the "Take Action" button to complete the action.



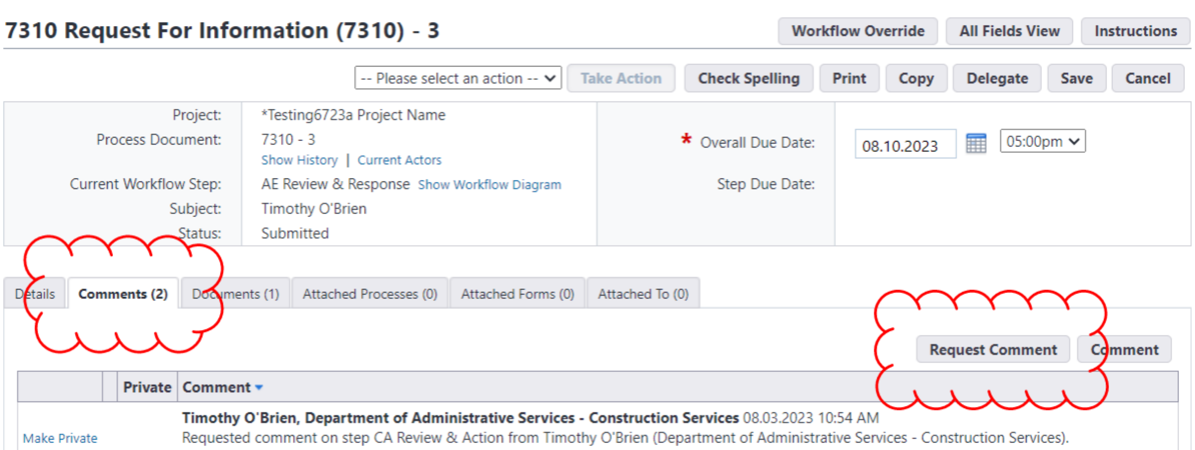
If "Return" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Return" to complete and send the comments.

When the “Send to Sub” option is selected, a comment screen will appear, with an “Add Comment” for the A/E to give instructions to their subconsultants, and an “Add actors to the next step” to select the subconsultant(s) to which the RFI is to be referred.

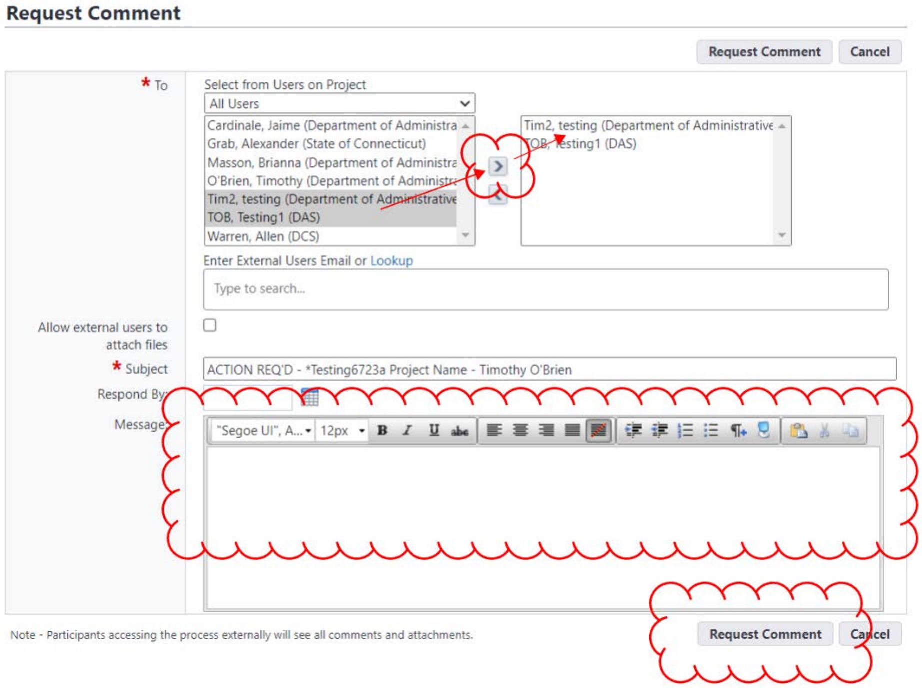
To add a subconsultant to the next step, the A/E will select the subconsultant’s name from the list of “Available Users” column and then click the “>” to move that individual into the “Selected Users” column. After adding a comment and selecting the user, click “Send to Sub.”



As an alternative to the “Send to Sub”, it may be preferable to go to the “Comments” tab of the RFI instance and click the “Request Comment” button. Using this “Request Comment” method allows the A/E to maintain control of the item in workflow, rather than giving the subconsultant control in the workflow.



After clicking the “Request Comment” button, a pop-up will appear that allows the A/E to select their subconsultant users in the “To” field by selecting their names and pressing the arrow button to move them to the right panel. The “Message” field allows the A/E user to provided instructions to the subconsultants. Then the “Request Comment” button sends a comment request notification to the subconsultant.

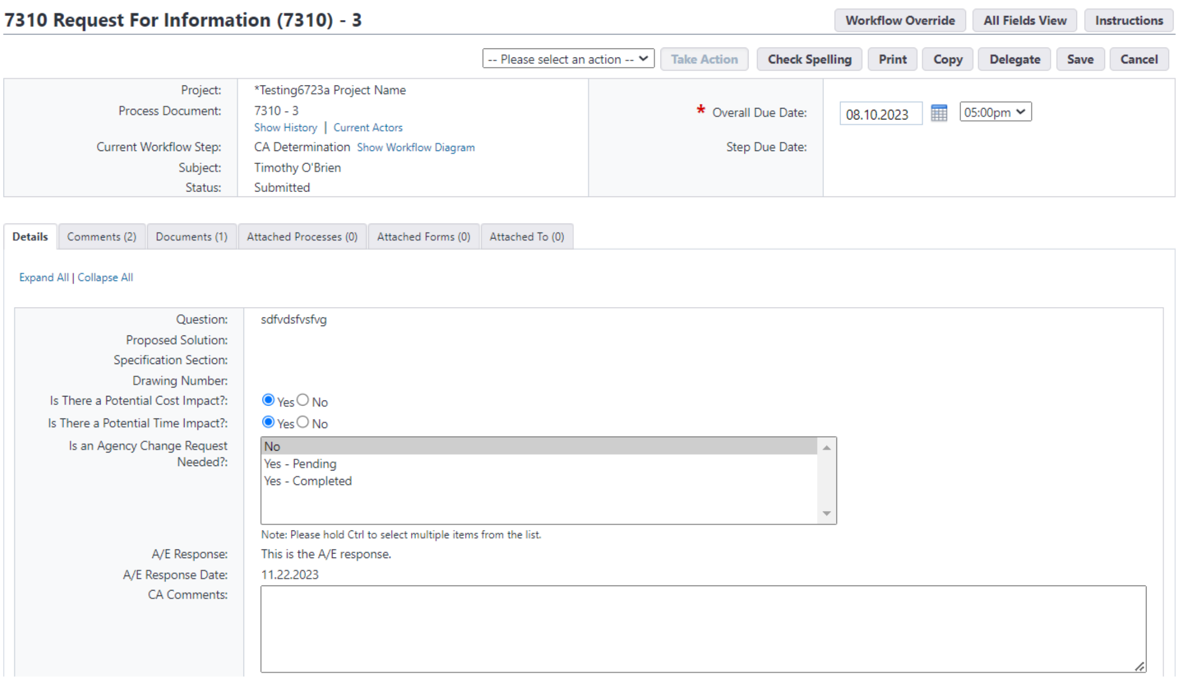


When the subconsultant responds, their comments will be posted in the “Comments” tab of the RFI instance.

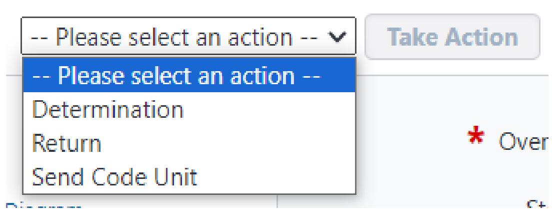
20.04 CA Determination

After the A/E completes their review, the RFI will be forwarded to the CA for final determination. To access the RFI instance, the CA should follow the steps outlined in Section 20.02 to open the process instance.

Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the "Documents" tab, and any comments made regarding the RFI under the "Comments" tab. The CA will then return to the "Details" tab and provide a response to the editable questions.



At the top and bottom of the form are pull-down menus that allow the CA to select the action they need to take. The CA can either select "Determination" or "Return". "Send Code Unit" is also listed as an option, but should not be used at this time. After making a selection, click the "Take Action" button.



If the CA selects "Return", the RFI will be returned to the A/E with instructions for correction

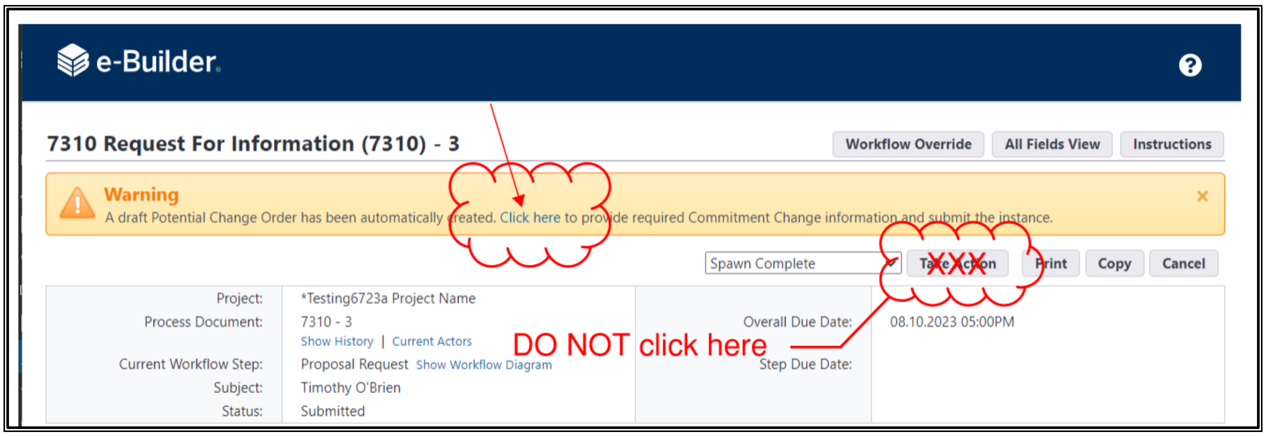
If the CA selects "Determination" and answered "Yes" to the "Is there a Potential Cost Impact" question, then the RFI workflow will generate a Proposal Request, as part of a "Potential Change Order (PCO)" process instance.

20.05 A/E Proposal Request Step

After the CA makes a final determination on an RFI that was identified as having a potential cost impact, the A/E will receive an email notification to that effect. To access the RFI instance, the A/E should follow the steps outlined in Section 20.03 to open the process instance.

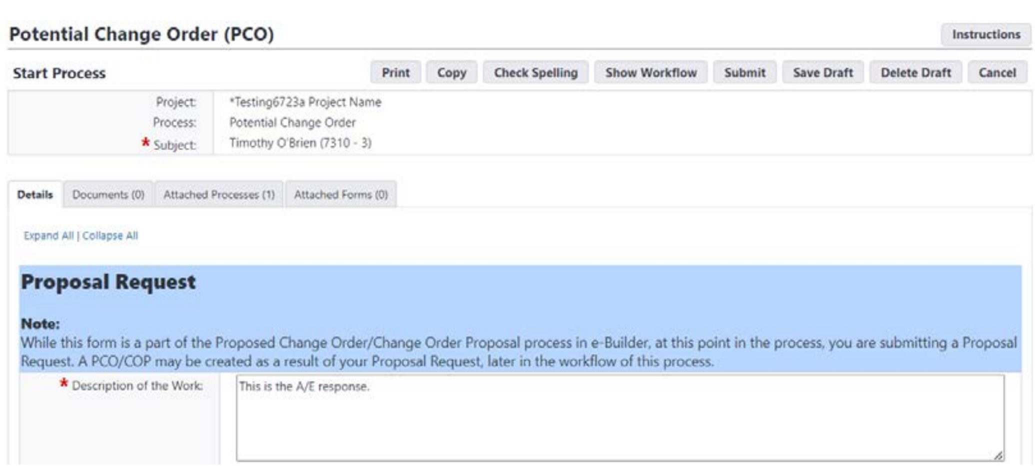
Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions.

The purpose of the RFI process instance at this step is to launch a Proposal Request instance. After opening the process instance, note the “Warning” banner at the top of the page. The only action the A/E should take is to click the “Click here” link in the banner. **DO NOT** click “Take Action” at this step.



After clicking “Click here,” an instance of the “Potential Change Order (PCO)” process type will be launched. This is an entirely new process type and an entirely new process instance. The “Potential Change Order (PCO)” is the umbrella name for a process that begins with Proposal Requests and may generate into CCDs and/or COPs. See the instructions for the “Potential Change Order (PCO)” process for how to proceed with this process.

Note that the RFI’s workflow process will be automatically completed when the Submit button is pressed by the A/E user in the Proposal Request part of the “Potential Change Order (PCO)” process, meaning that no further action needs to be nor should be taken by users on the RFI.



Section 21: Proposal Requests

21.01 Coming Soon

Section 22: CCDs

22.01 Coming Soon

Section 23: COPs

21.01 Coming Soon

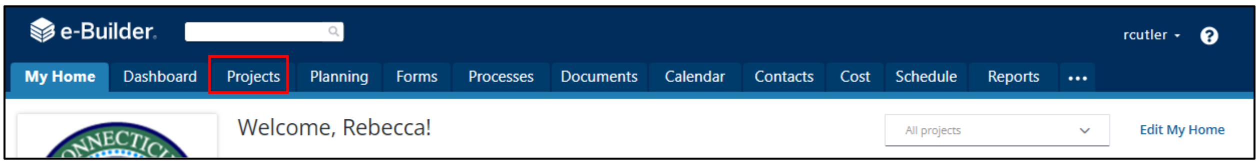
Section 24: Change Orders

21.01 Coming Soon

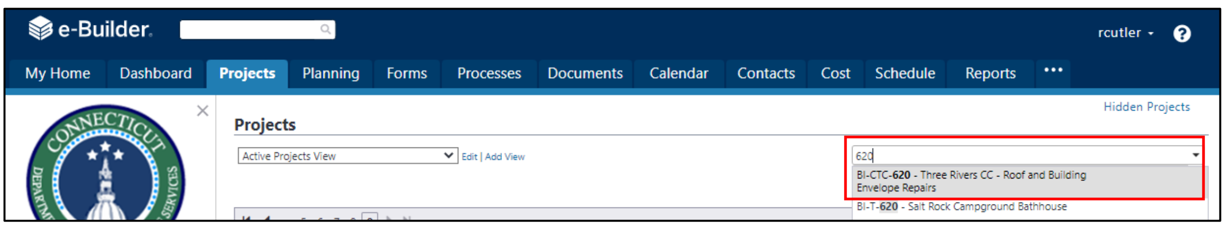
Section 25: Submittals

25.01 Accessing the Process

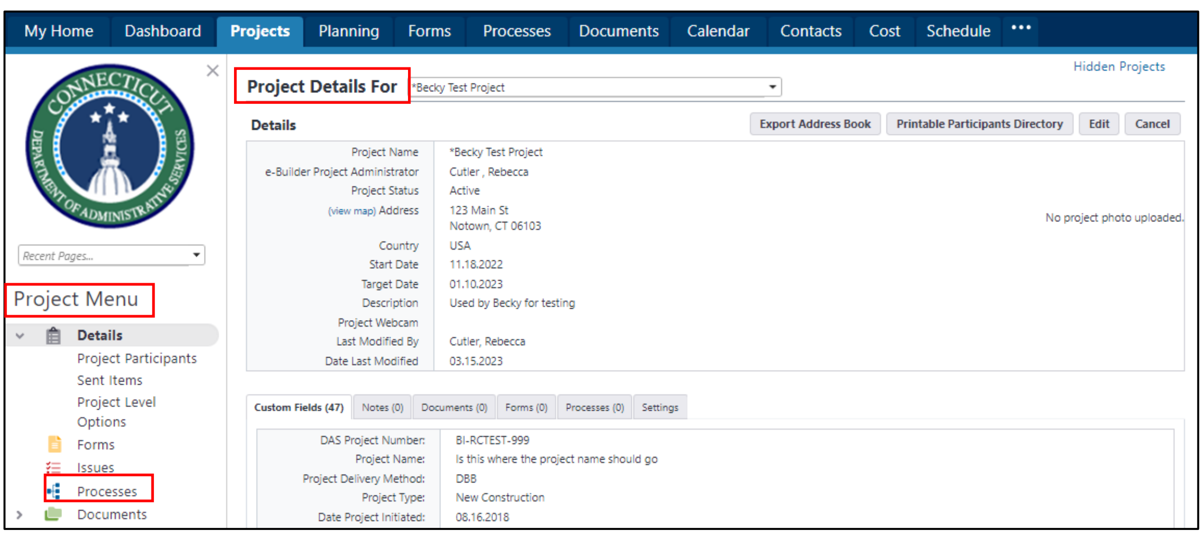
Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f and click on the "Projects" tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.

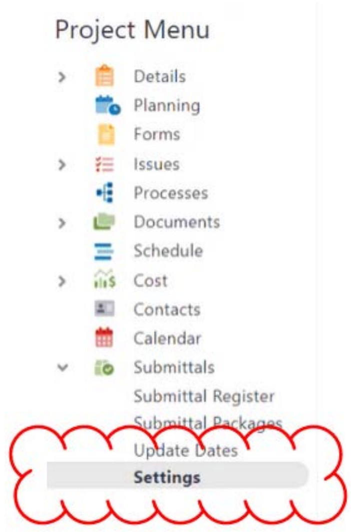


The "Project Details" page is your home page for your project. (Click "Edit" to edit info.). Under the "Project Menu" on the left, click on Processes to find project-specific processes.

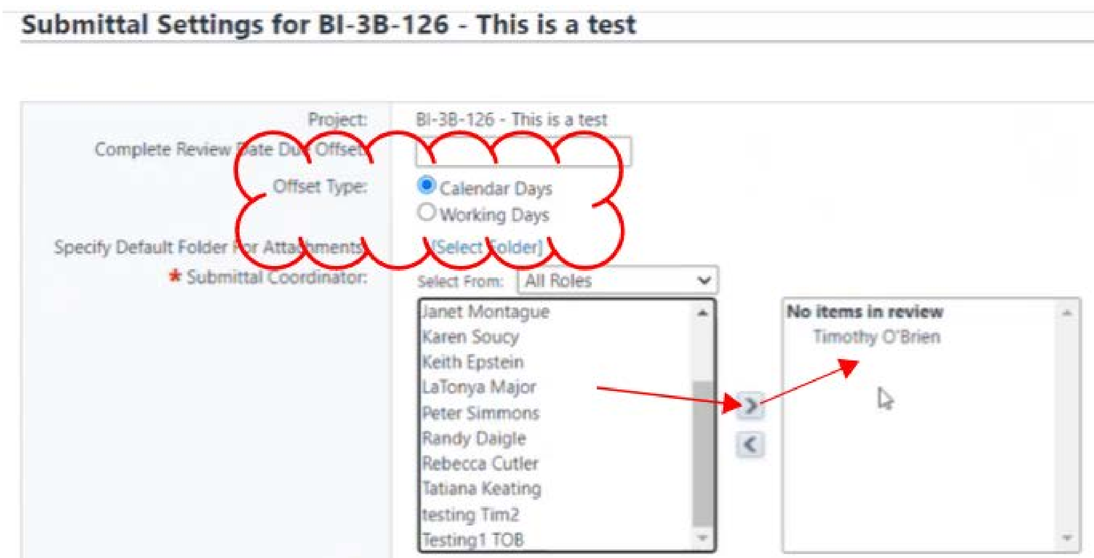


25.02 Submittals Settings (Project Manager or CA)

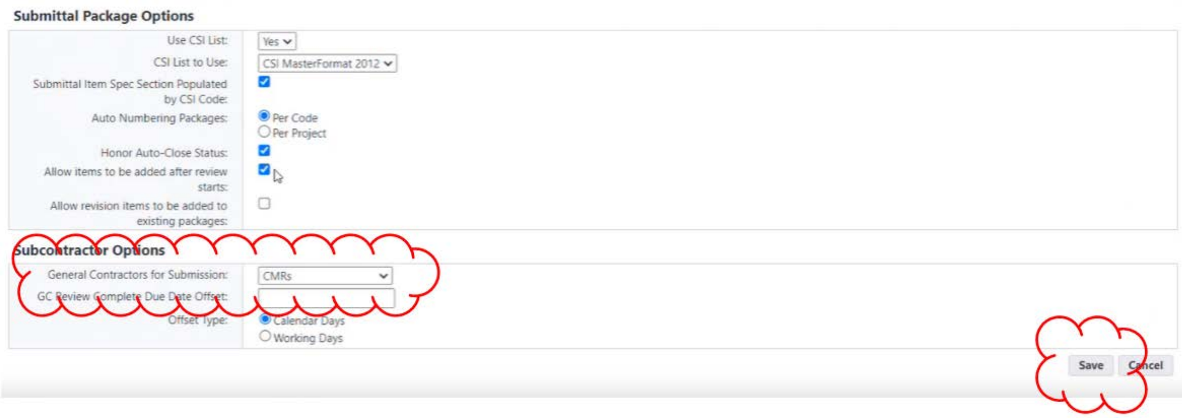
Before the Submittals begin on a project, click on the settings option for Submittals.



Ensure that the Offset Type setting is set to "Calendar Days." Then select one or more CA staff as Submittal Coordinators by clicking on their names and then clicking the right arrow button.



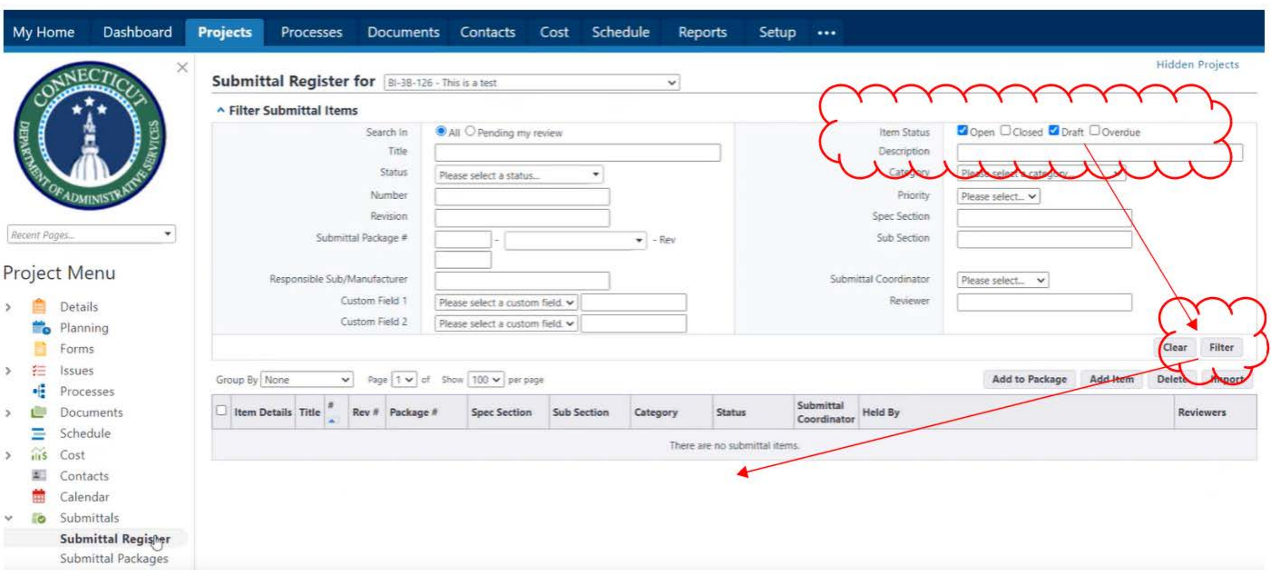
Set “General Contractors for Submissions” to “GCs” or “CMRs”, ensure that the other settings are correct and click Save.



25.03 Filter Functionality

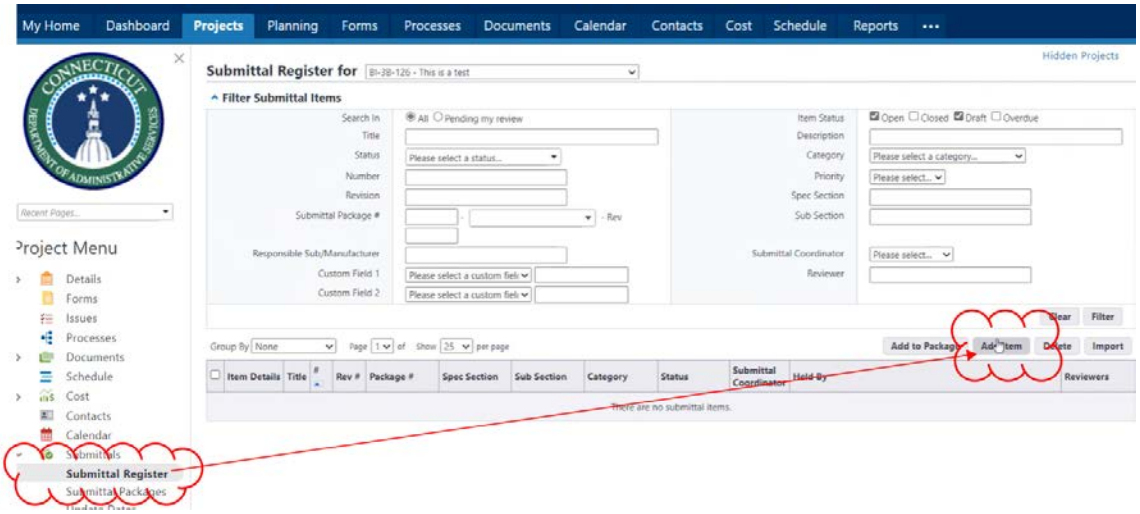
The processing of Submittals and Submittal Packages involves the changing of their status, as discussed, below. Users can filter the Submittal Register and the list of Submittal Packages using the eBuilder filters.

There are a number of filter criteria that are available. These include the ability to toggle different statuses. Select, for example, “Open” and “Draft” to filter only for submittals that have been submitted or have not been submitted yet; or select “Closed” to find items that have been marked as closed. When the filter selections are made, click the “Filter” button and the respective Submittals or Submittal Packages will appear in the grid, as shown below.

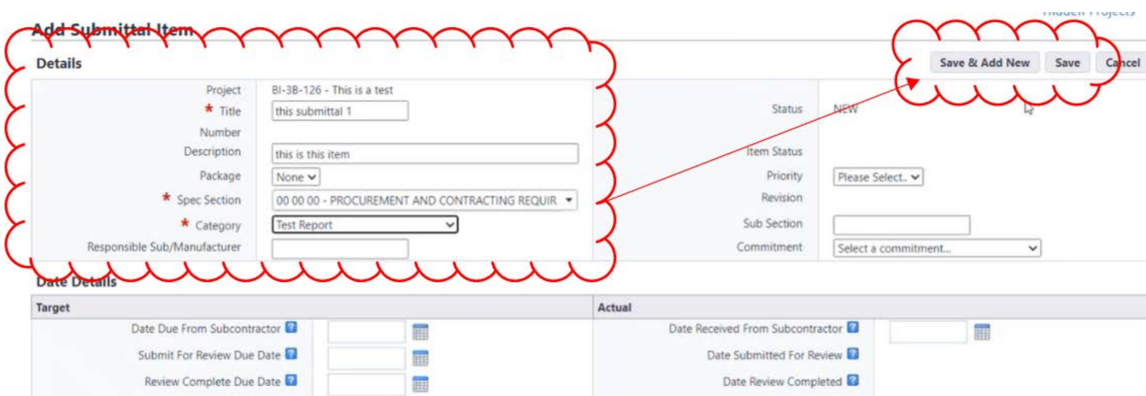


25.04 Creating Submittals in the Submittal Register (GC or CMR)

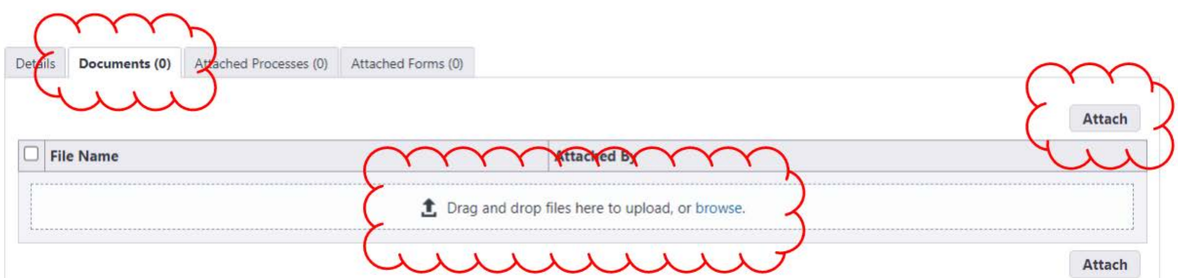
To create new submittals in the Submittal Register, click “Submittal Register” and then the “Add Item” button.



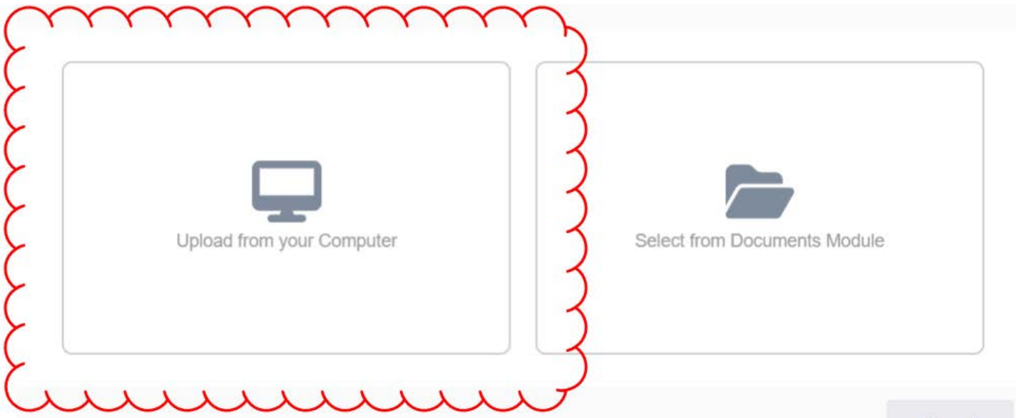
Then complete the required fields. Enter a Title and select the Specification Section and Category. Complete the other fields required by project procedures. Then click either “Save” to complete entering new submittals or “Save & Add New” to save and start another submittal.



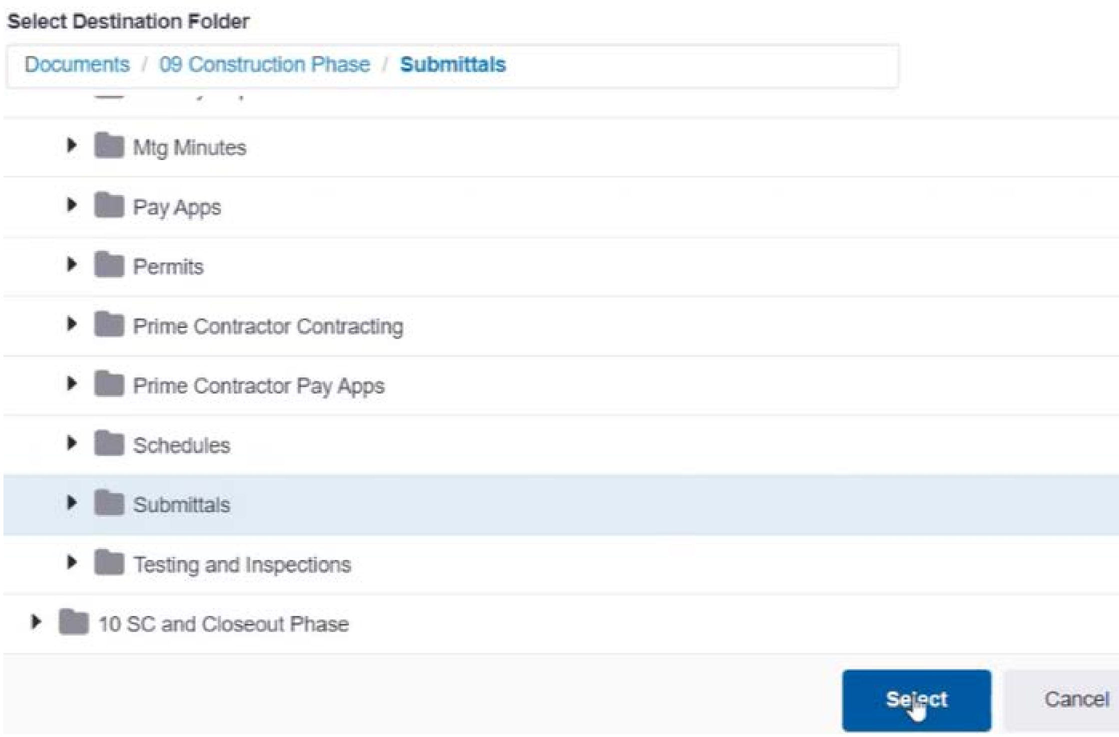
Once a submittal has been saved, the tools for uploading attachments become available. Documents can be uploaded by either using the “drag-and-drop” feature or by clicking the “Attach” button.



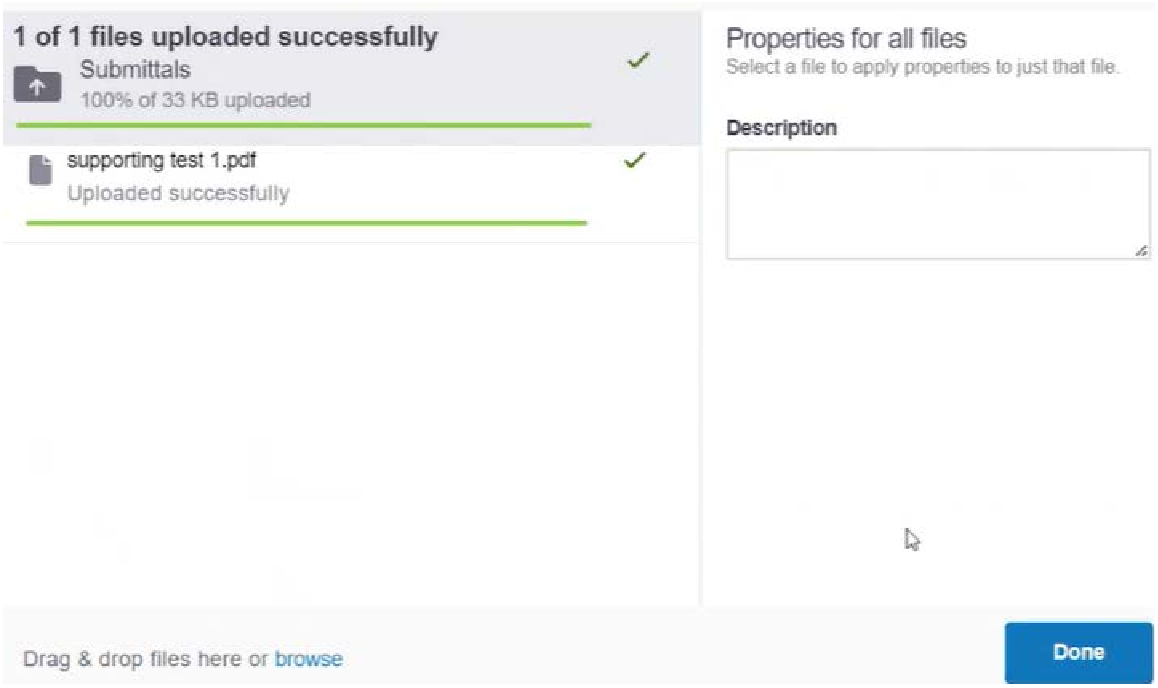
If the “Attach” button is clicked, a pop-up will appear. Click the “Upload from your Computer” button to locate a locally stored document.



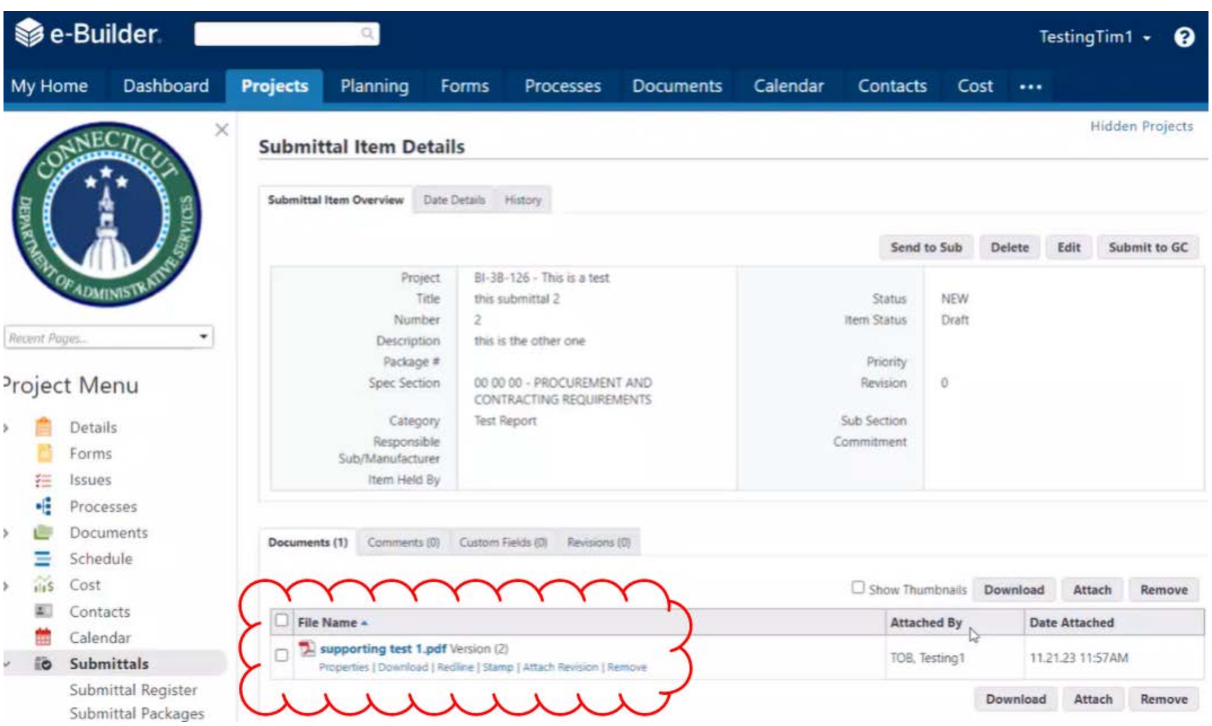
When uploading, a dialogue box will appear for the user to select the applicable Submittals folder in the eBuilder Documents module. Click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the documents. If applicable, an alternate folder can be selected.



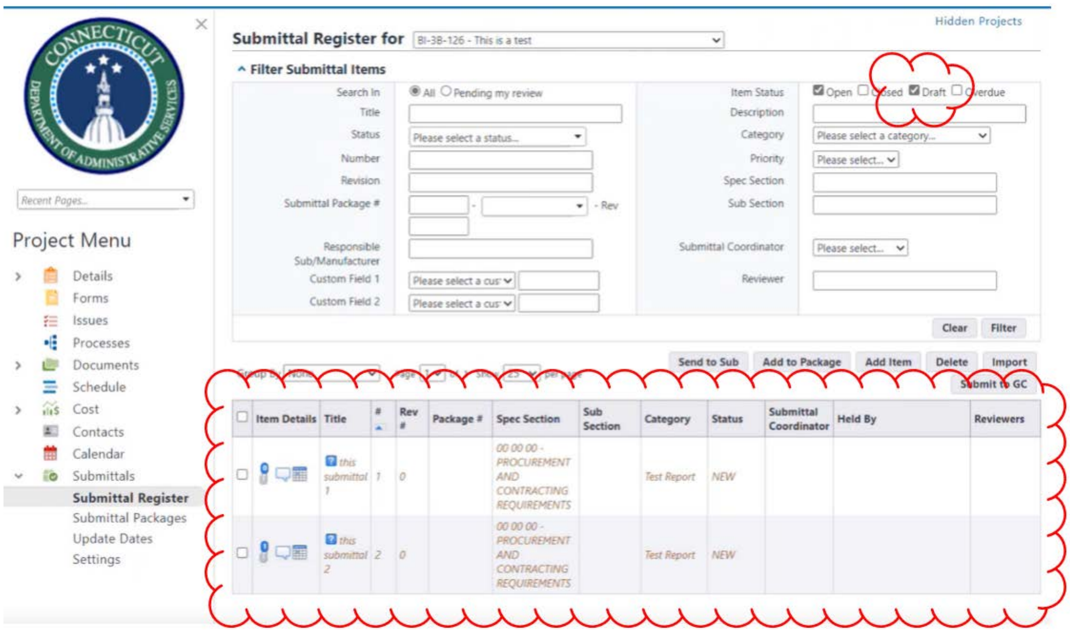
When the upload is completed, click “Done”.



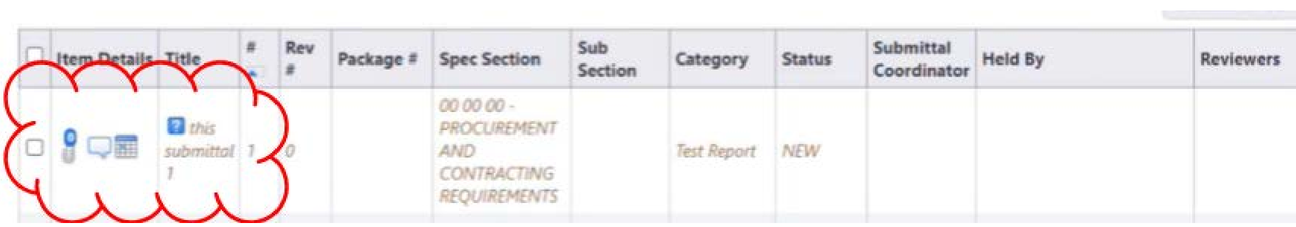
The file is then attached to the submittal and can be viewed in a pop-up window by clicking on its filename.



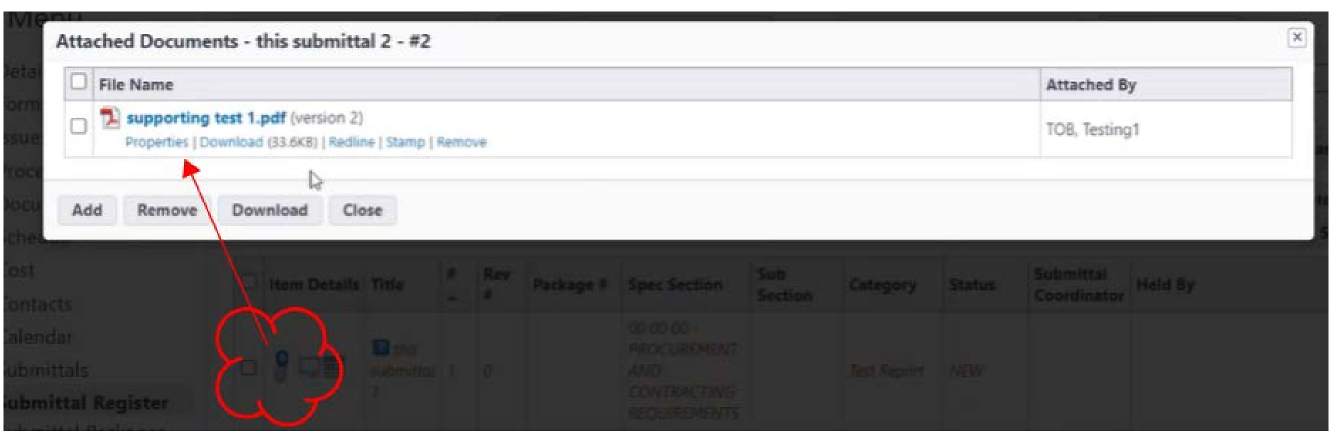
Saving the submittals causes them to appear in brown italic as drafts in the Submittal Register. (Note that this list shows drafts because it is set to include Drafts in the Filter.)



The buttons in the “Item Details” column of the Submittal Register allow users to interact with certain details of the submittals without reopening the records.



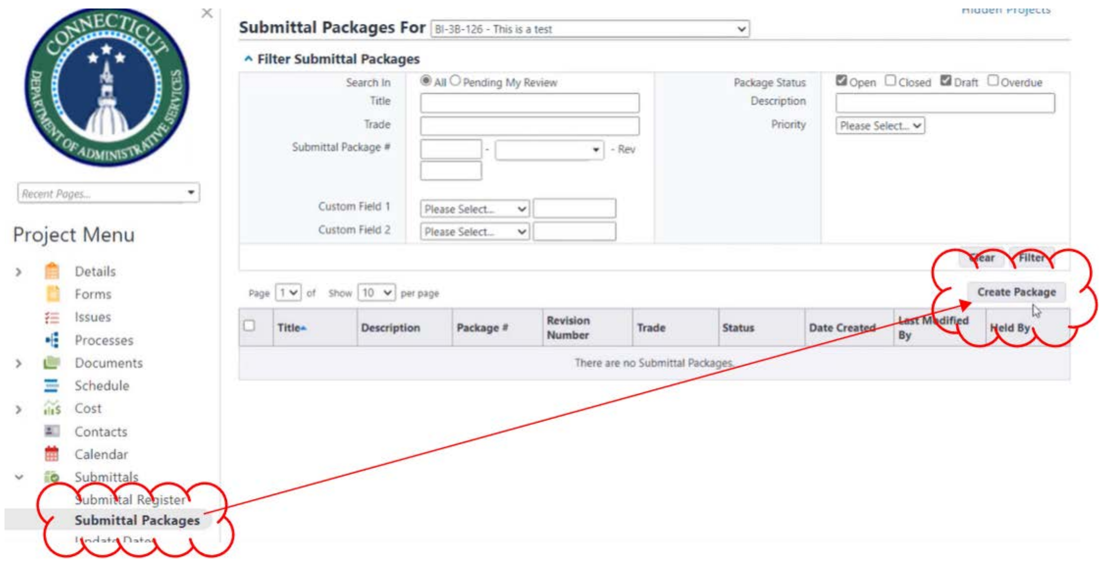
For example, the paperclip button allows users to bring up a dialogue box allowing users to view or add attachments to the submittal.



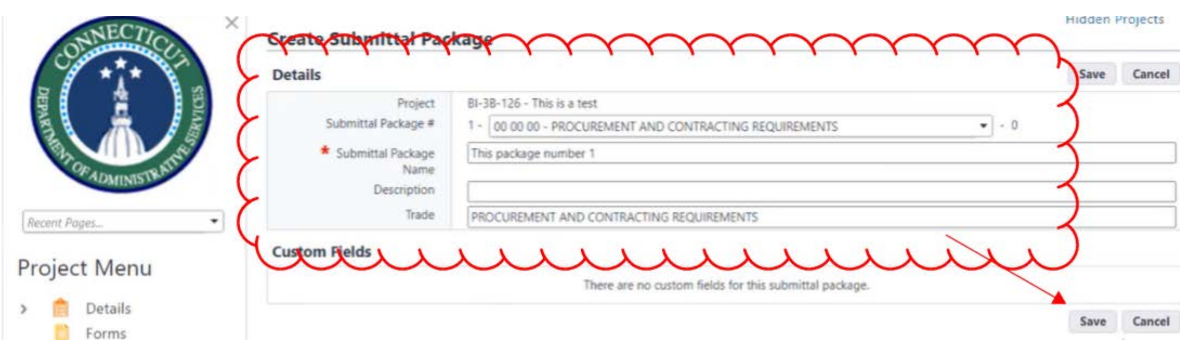
A submittal may be re-opened by clicking on its Title.

25.05 Creating Submittal Packages (GC or CMR).

Submittal packages can be created by clicking on Submittal Packages and then clicking the "Create Package" button.

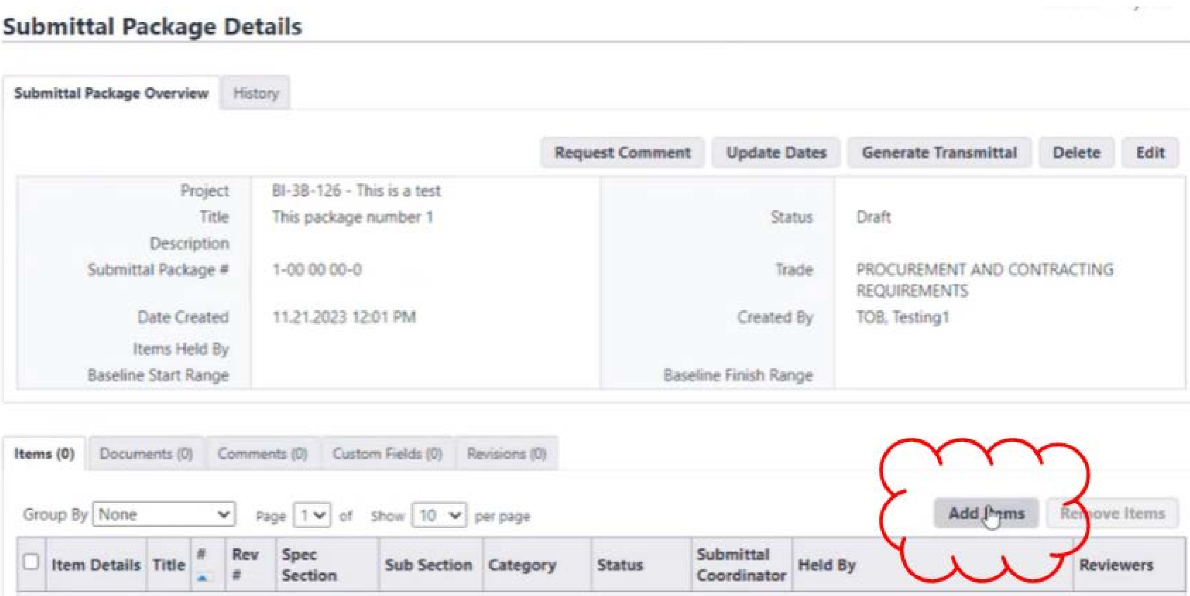


Select the specification section of the package in the "Submittal Package Number" field, enter its "Submittal Package Name" and any other relevant information and click the Save button.

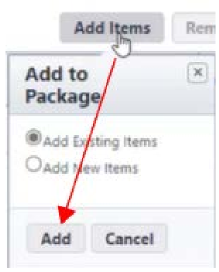


25.06 Adding Submittals to Submittal Packages (GC or CMR).

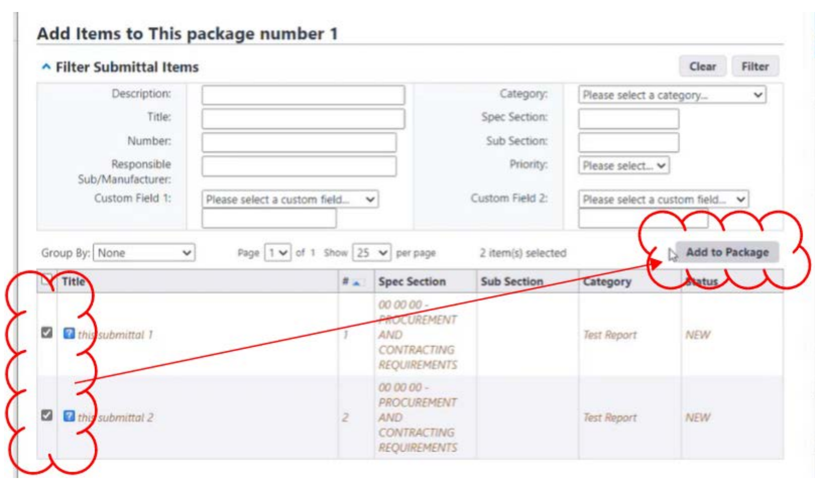
Once a submittal package is saved, submittals can be added to it by clicking the “Add Items” button.



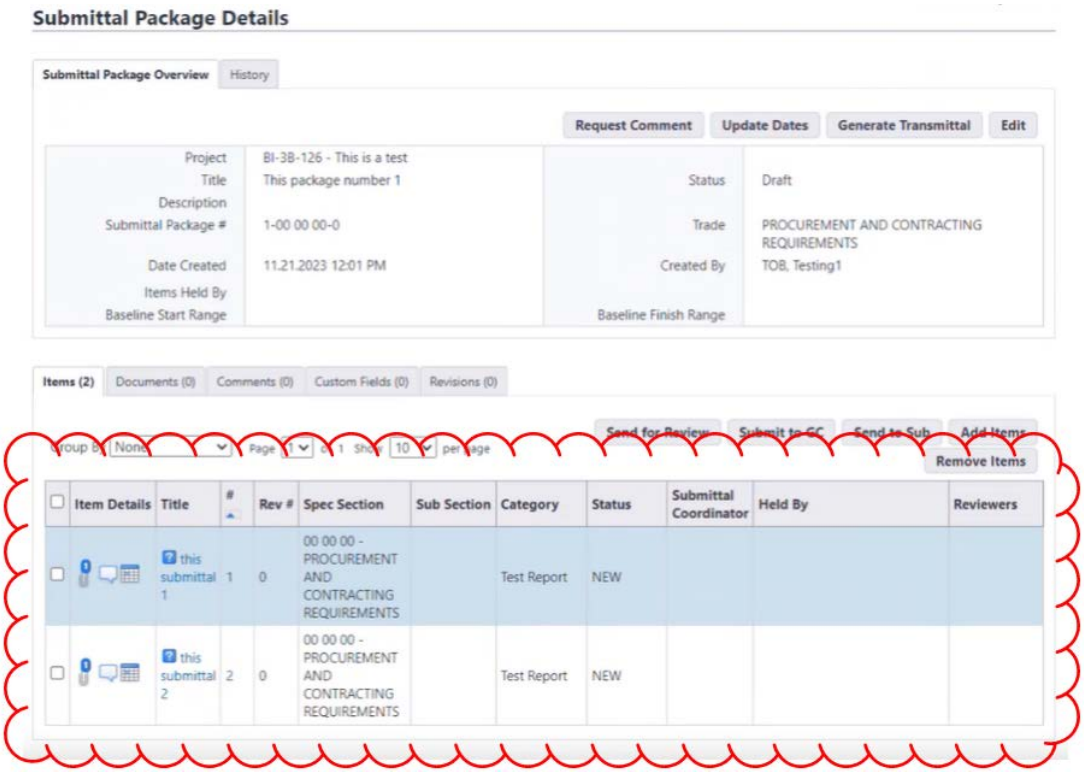
The user will be able to create new submittals, but keeping the setting to “Add Existing Items” & clicking “Add” will allow submittals that are in the Submittal Register to be added to the submittal package.



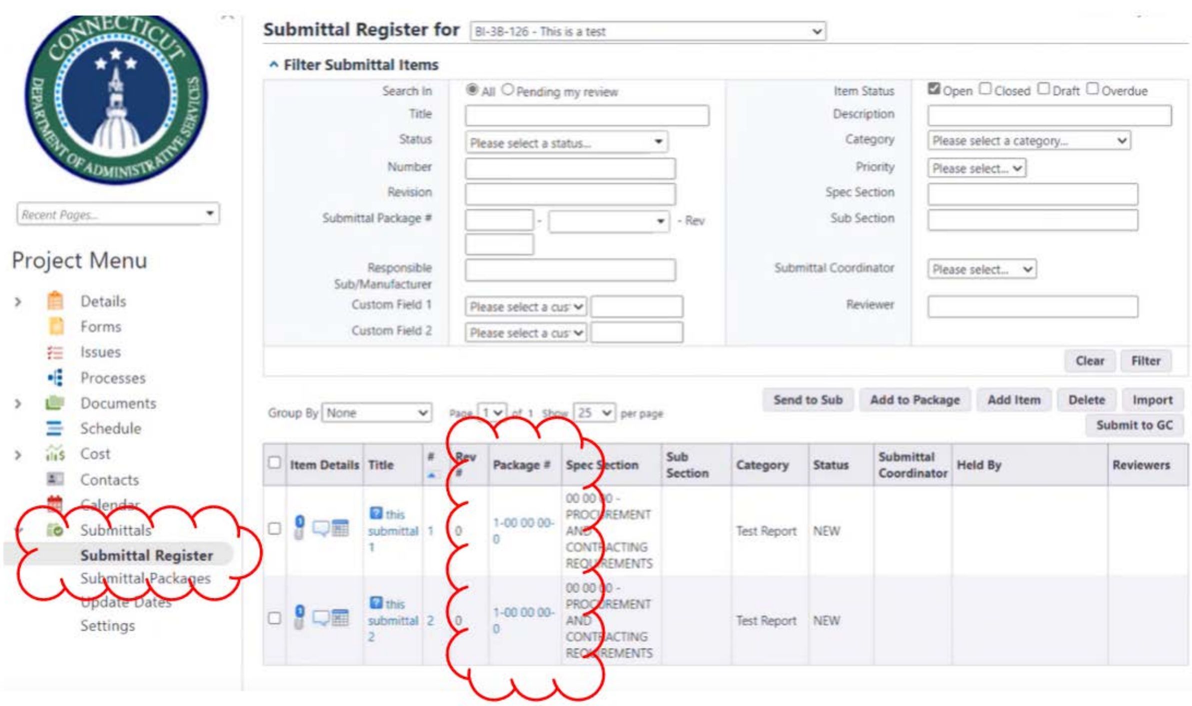
In the pop-up box that appears, mark the check boxes next to the submittals to be linked to the submittal package and click the “Add to Package” button. (Note that the top of the pop-up box has filters that allow the user to find submittals more easily in the Submittal Register, if there are many.)



After clicking “Add to Package”, the user will be asked to confirm the addition, and then the submittals will be added to the submittal package.

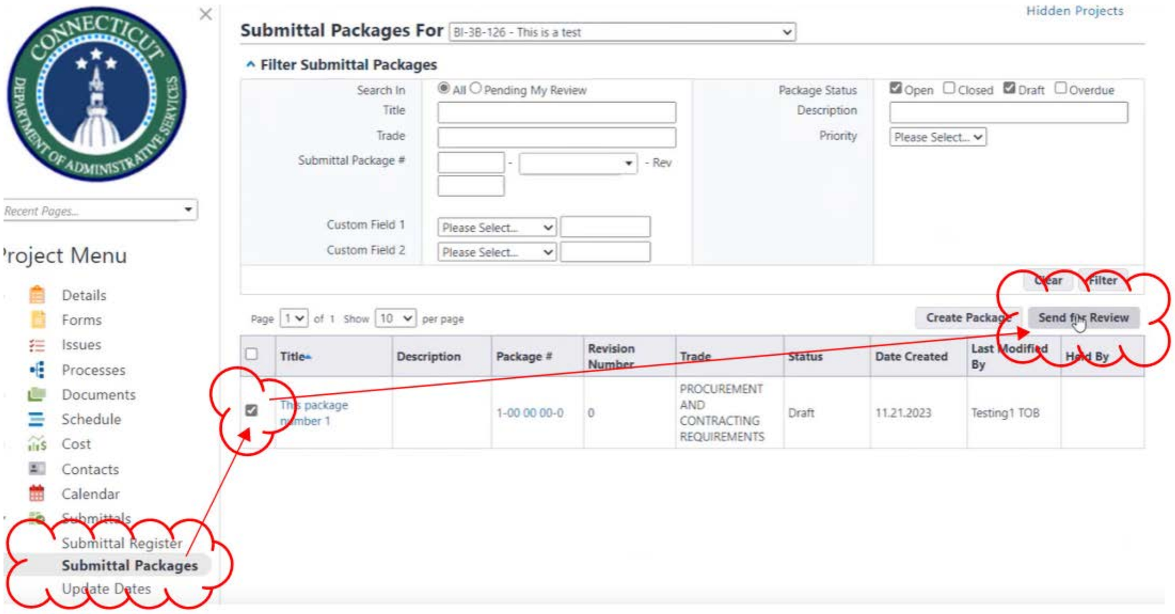


Note that the submittals brought into the submittal package now appear in the Submittal Register as “Open”, rather than “Draft”, and show what submittal package they are in.

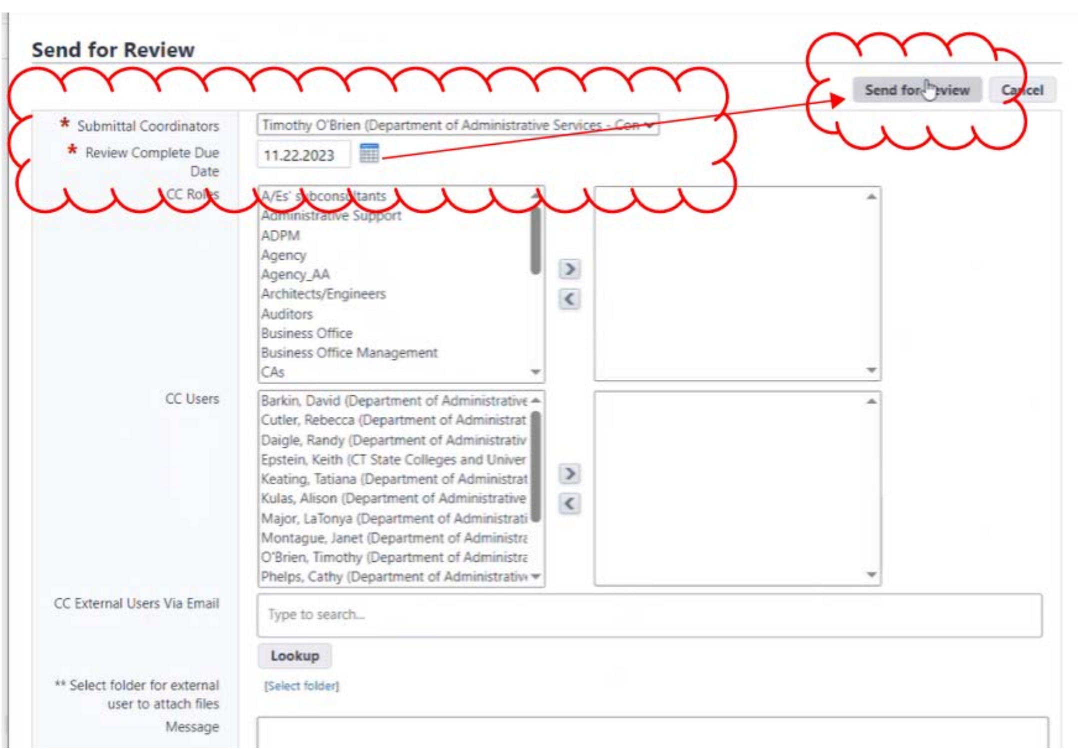


25.07 Sending the submittal package to the CA (GC or CMR).

Click on “Submittal Packages” to see the list of submittal packages, then click the check box next the submittal package to be sent to the CA, and then click “Send for Review.”

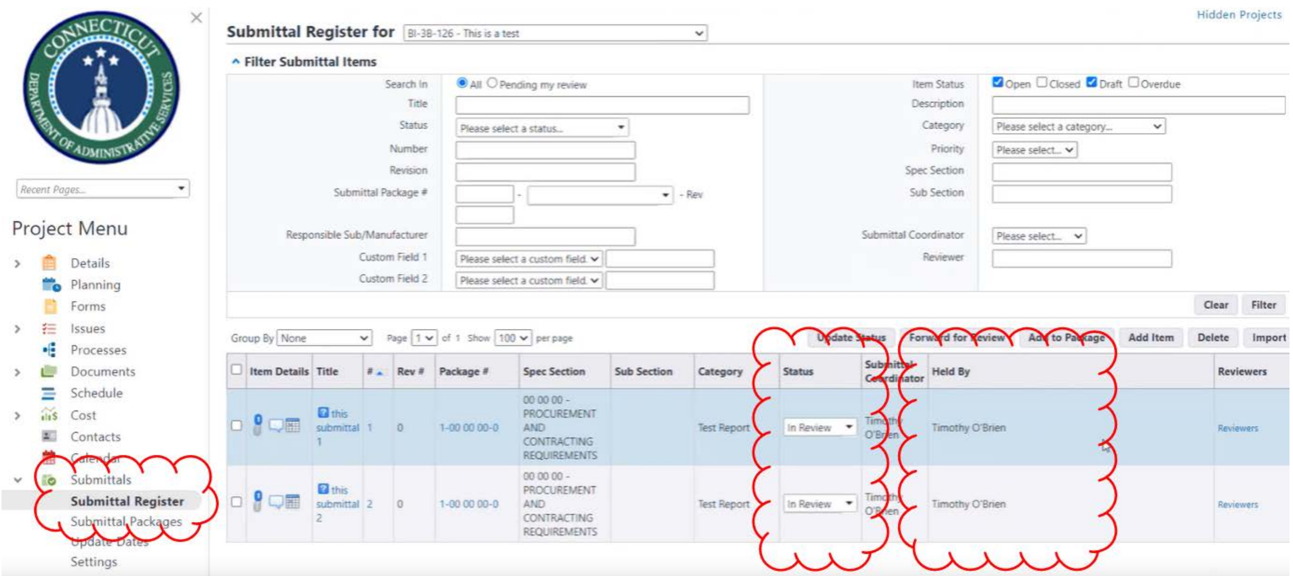


A pop-up box will open after clicking “Send for Review”. The Submittal Coordinator(s) will be pre-populated, but the user will be required to enter a “Review Complete Due Date” and will have the option to cc others, either by user role or by name. In addition, the user can add a message regarding the submittal package in the “Message” box. Upon completion, click the “Send for Review” button.

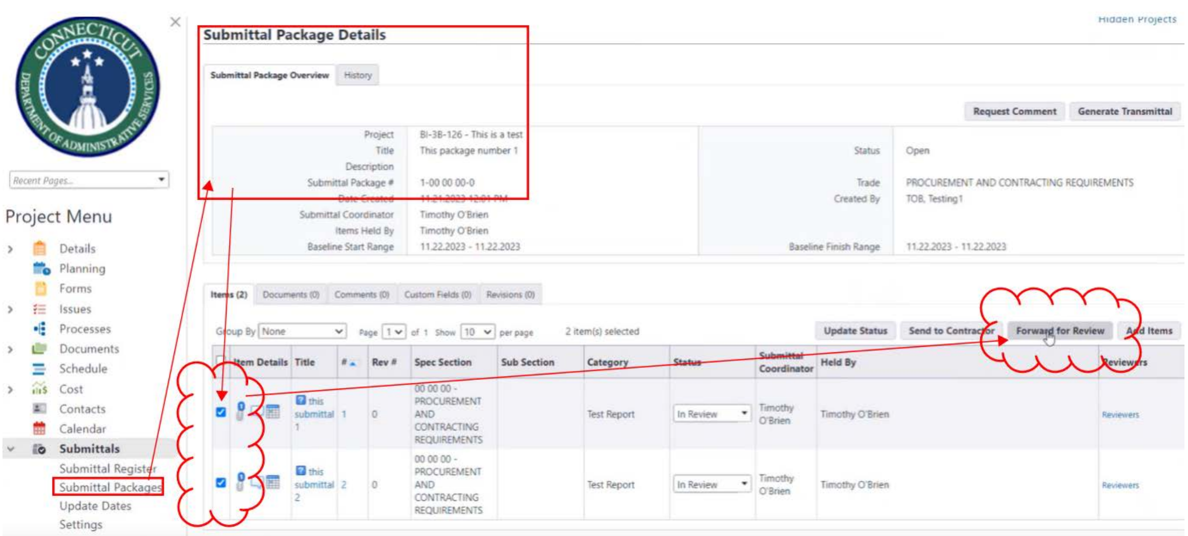


25.08 Sending a submittal package for A/E review (CA).

When the GC or CMR has sent a submittal package to the CA (as Submittal Coordinator), the CA will be able to see, in the Submittal Register, the “Held By” field populated with whoever holds the submittals at the moment and will also see the Status field values for each submittal as toggleable. It is the CA, as Submittal Coordinator, who marks the Status of submittals in the system, based on the A/E’s communication after their review. (See below.)

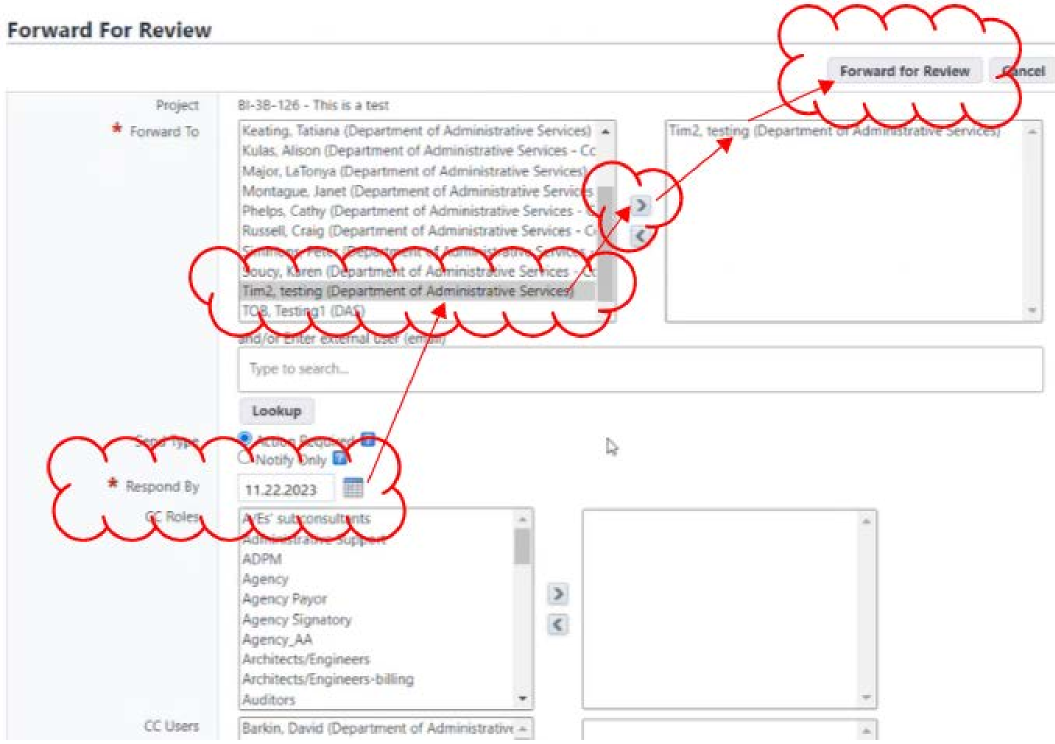


To send submittals to the A/E, the CA will locate the applicable submittal package from the Submittal Packages list and open the submittal package. In the submittal package, the CA marks the check box next to the submittals and clicks “Forward for Review.”

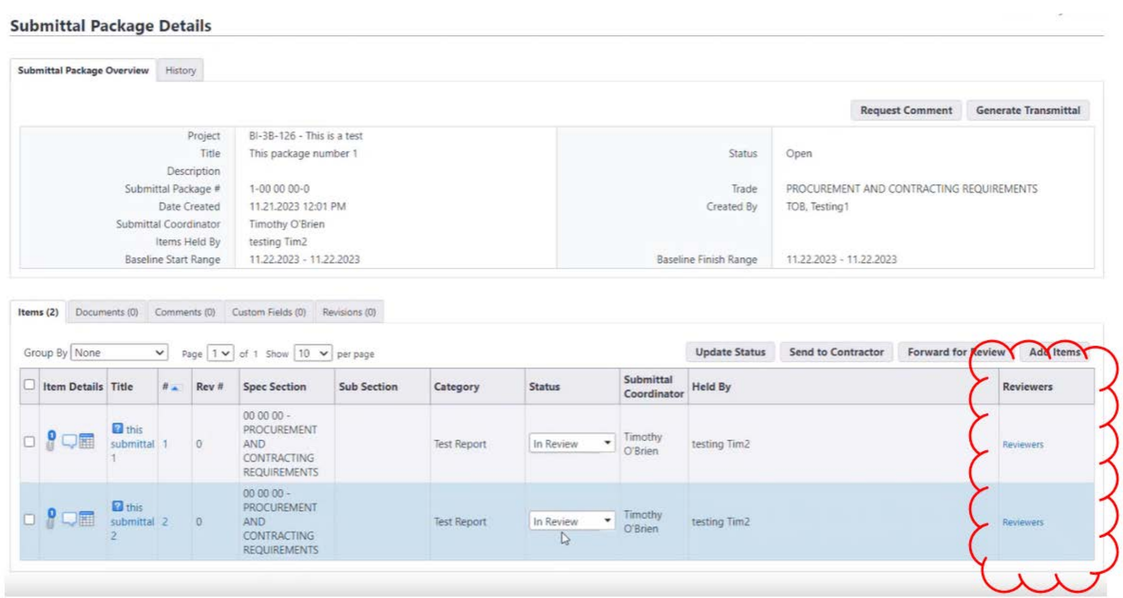


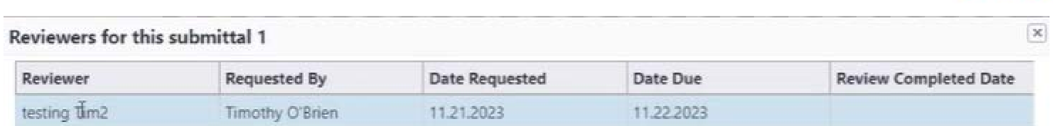
A pop-up box will appear that requires a “Respond By” date to the selected or entered. The “Forward To” box is where the CA enters the A/E users to whom the submittals will be sent for review.

To select users, locate and click on their name(s) and click the right arrow button. There are optional boxes to cc others, either by user role or by name and a message box to add a text message. (Note that there is also a "Notify Only" optional choice, as opposed to the "Action Required" option.) To complete the send action, click the "Forward for Review" button.

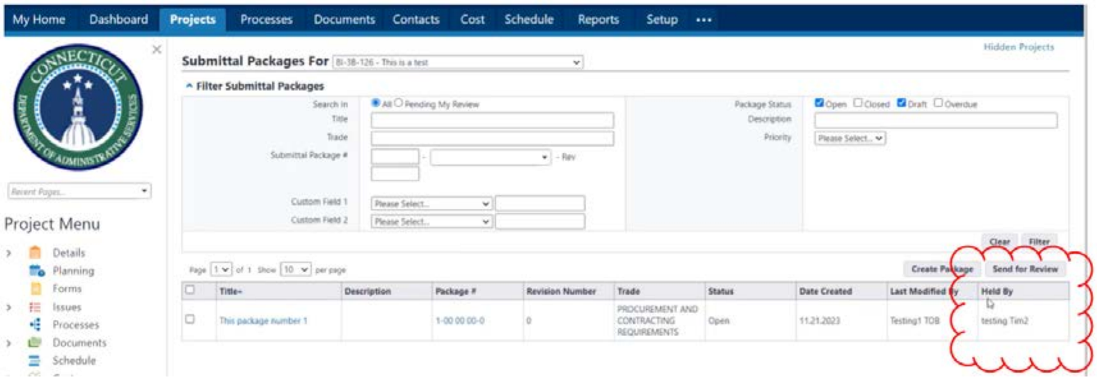


The links in the Reviewers column show who the reviewers are.



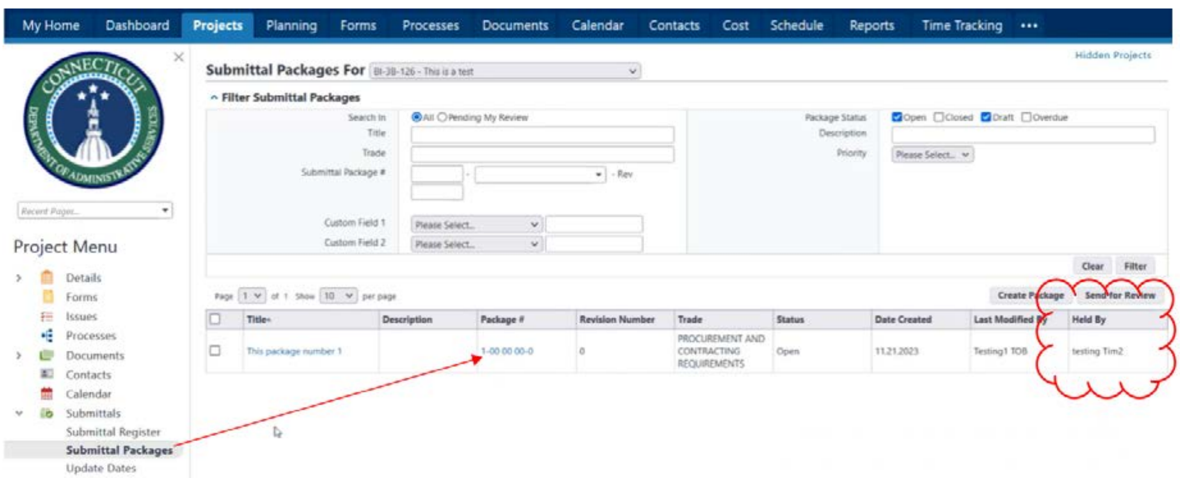


The “Held By” column, shown here in Submittal Packages, identifies who has the item, ball-in-court.

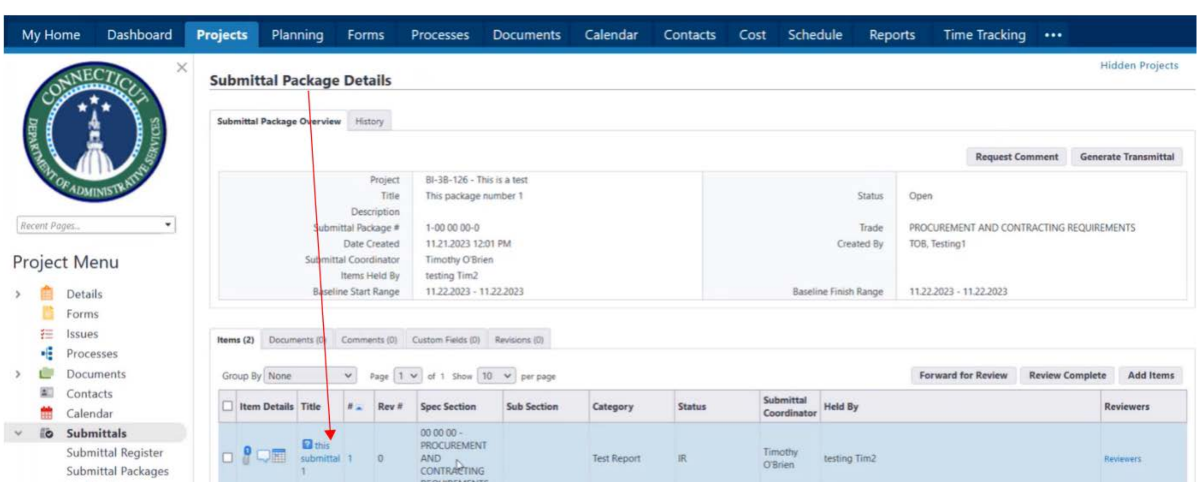


25.09 Submittal Review by A/E Users (A/E)

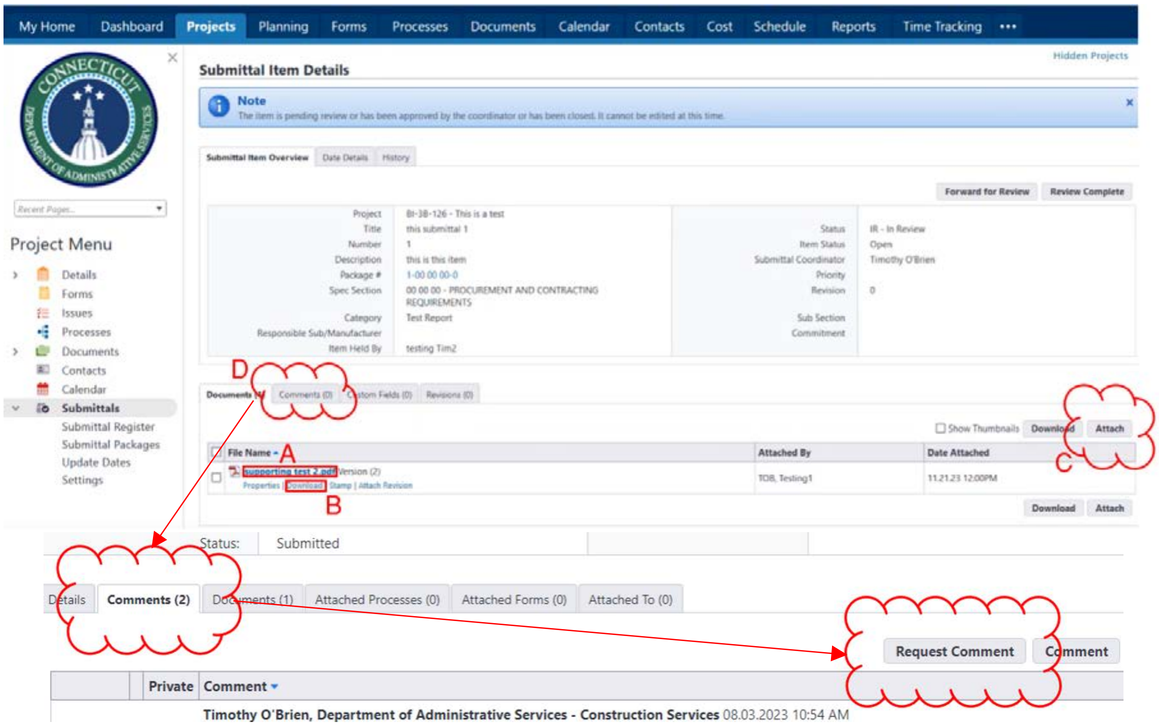
When the CA has sent a submittal package to the A/E, the A/E will be able to see, in Submittal Packages, the “Held By” field populated with whoever holds the submittals at the moment. The A/E user clicks on the Package # to go into the package.



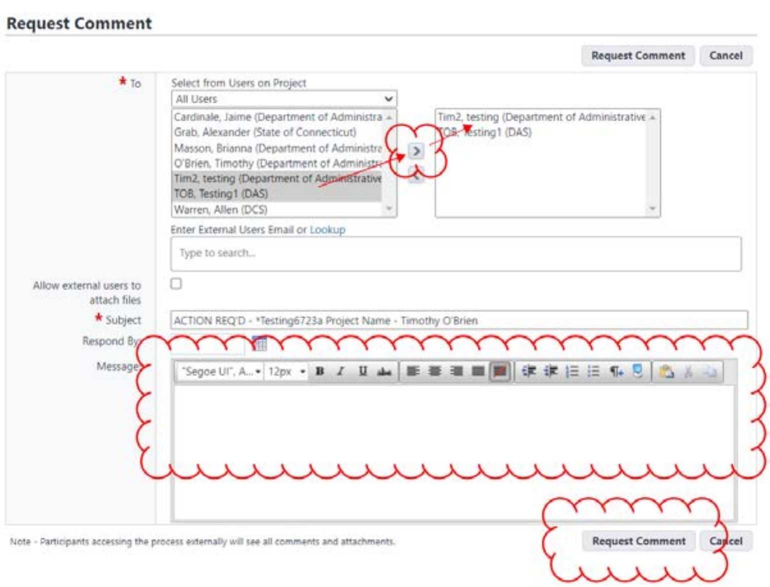
In the Submittal Package, individual submittals can be opened by clicking on the Title or # of the submittal.



In the submittal records, under the "Documents" tab, (A) click on the file name to open a viewer to see the file and (B) click the "Download" link below the file name to download the file. Additional files can be attached by (C) clicking the "Attach" button and (D) click the Comments tab to add or request a comment. In addition to noting the A/E marking/stamp when sending the package back to the CA, the A/E should also note the marking in the comments of each submittal.

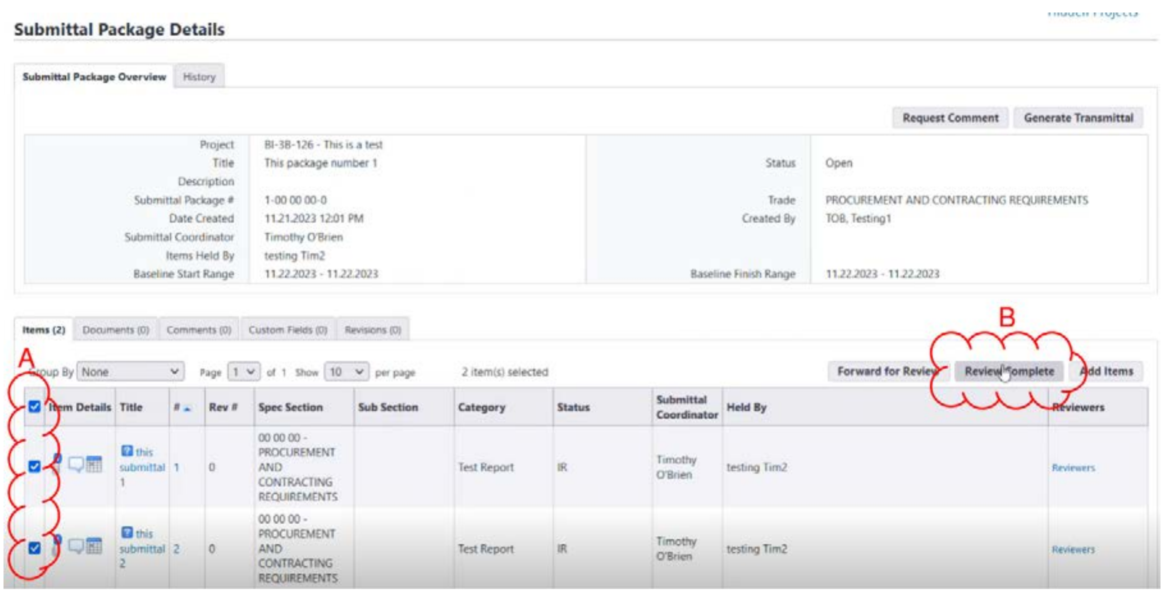


After clicking "Request Comment", a pop-up will appear that allows the A/E to select their subconsultant users in the "To" field by selecting their names and pressing the ">" to move them to the right panel. The "Message" field allows the A/E user to provide instructions to the subconsultants. Upon completion, click the "Request Comment" button to send the notification to the subconsultant.



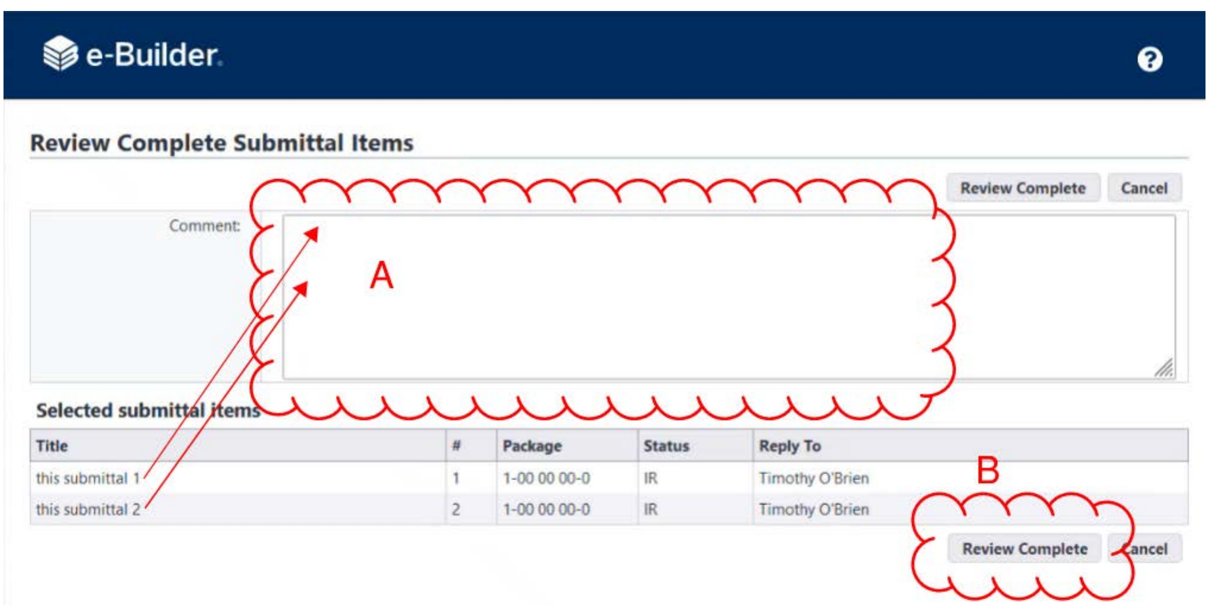
When the subconsultant responds, their comments will be in the Comments tab of the submittal instance.

To complete the review and return the submittals to the CA, the A/E goes into the Submittal Package, (A) selects the applicable submittals and then (B) clicks “Review Complete”.



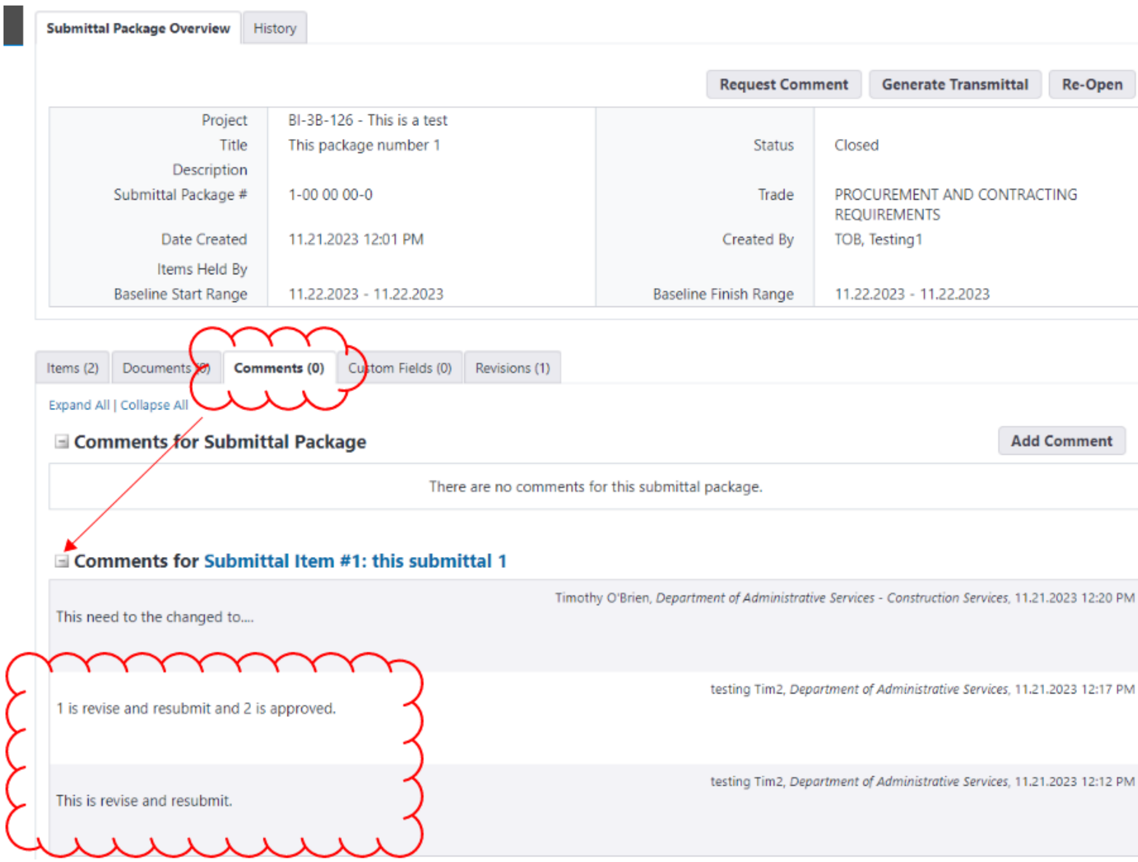
A pop-up screen will appear to allow confirmation.

Very important: (A) The A/E needs to note, for each of the submittals being sent back to the CA, what their marking is. The CA controls the toggle on the Status column for submittals, so this message is important to inform the CA what the A/E stamp says. Then, (B) click “Review Complete”.

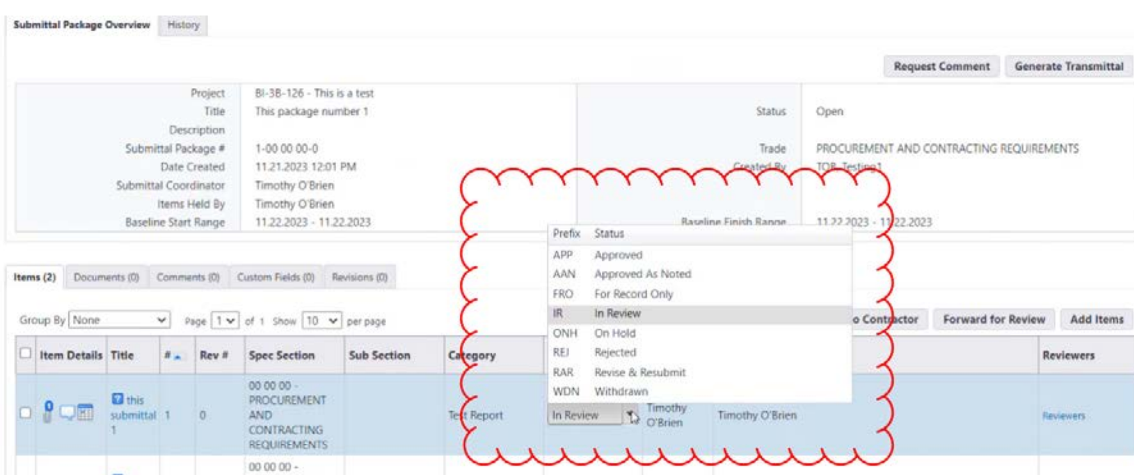


25.10 Return of submittals to GC/CMR (CA)

When the A/E has returned a submittal package, the CA will click on the “Comments” tab to review the comments left by the A/E. Click the “+” sign to the left of the submittal name, as shown below, to open the comments. The comments will also appear in the submittal items, themselves.

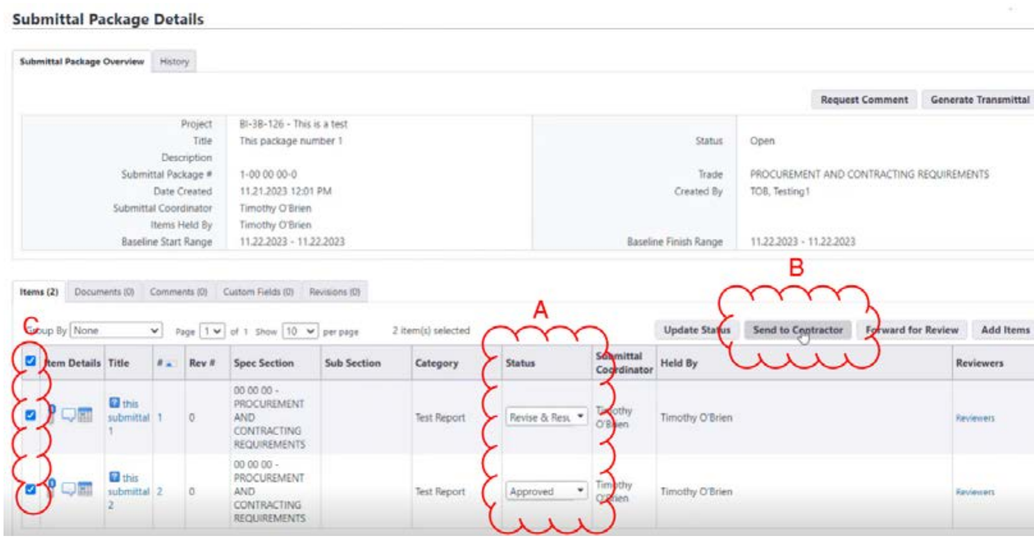


While in the submittal package, click on the “Items” tab, then click the arrow in the Status field in the row of a submittal, and then select the marking indicated by the A/E.

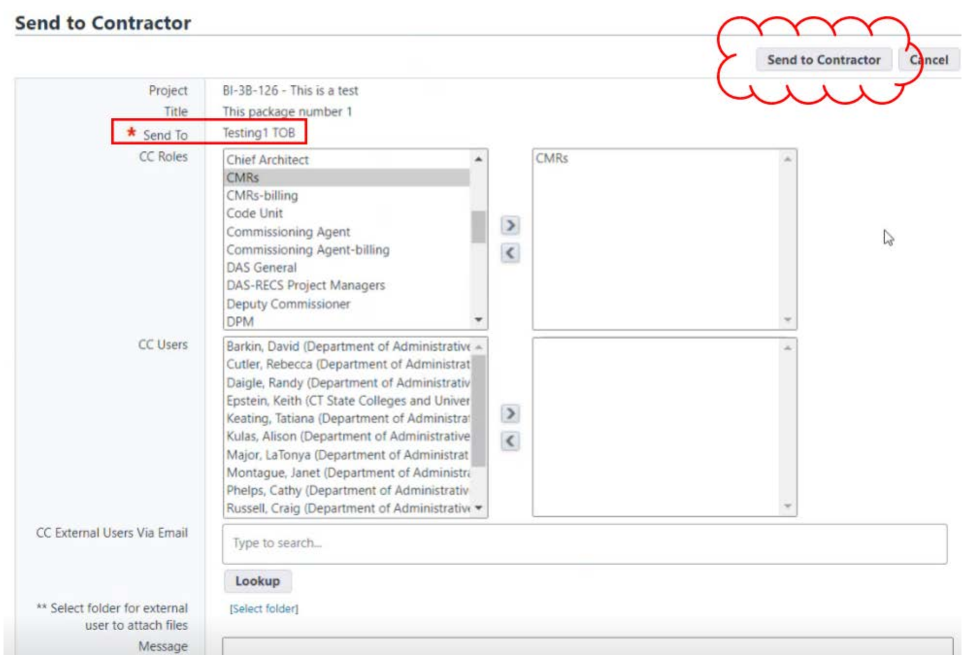


This will prompt the CA to enter a comment about the action.

In the submittal package, after (A) updating the statuses of the submittal items, the CA then (B) selects all of the submittal items and (C) clicks “Send to Contractor.”

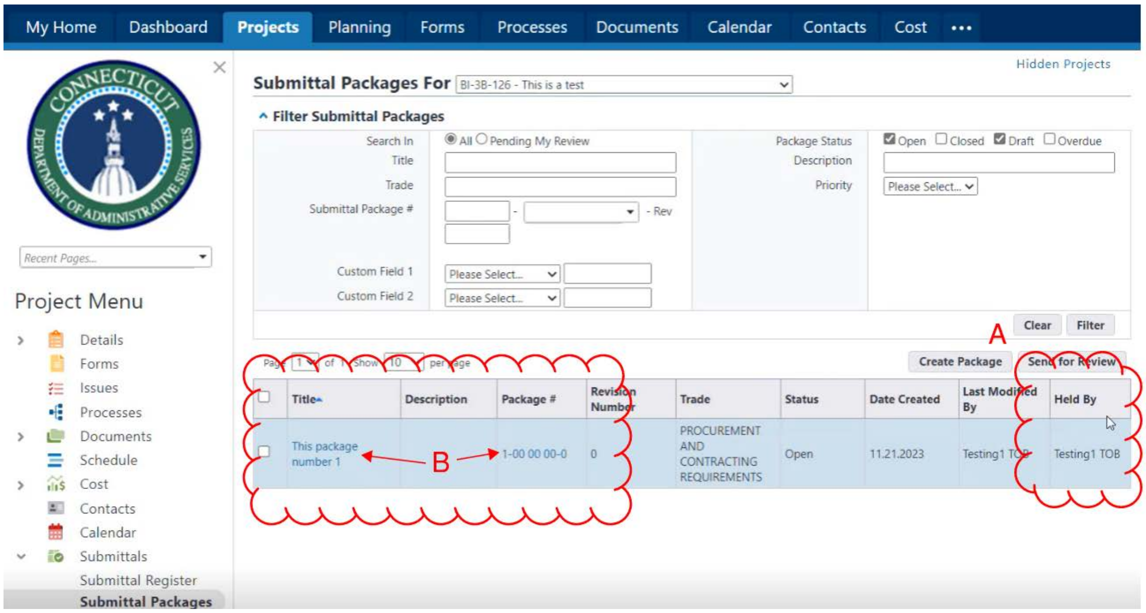


A pop-up will appear. The CA can provide a comment in the message box if applicable, then click “Send to Contractor.”

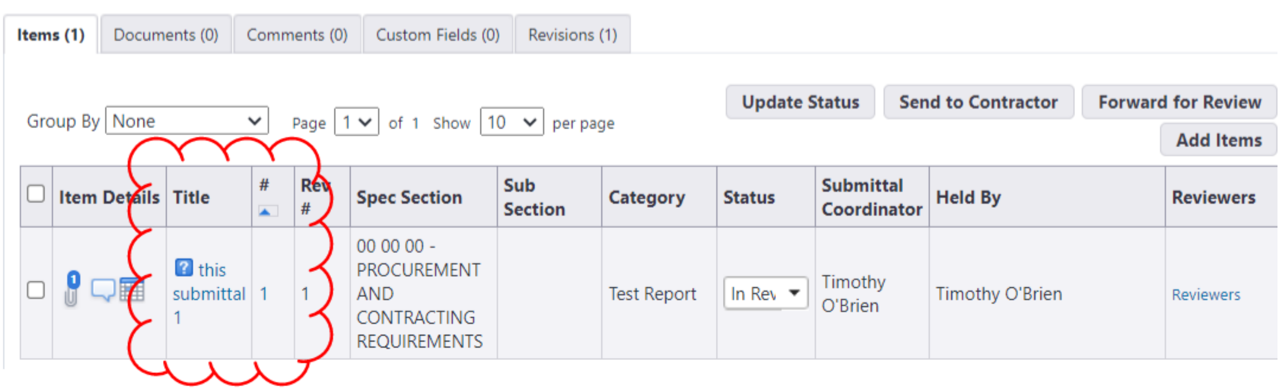


25.11 Closing Returned Submittals (GC or CMR)

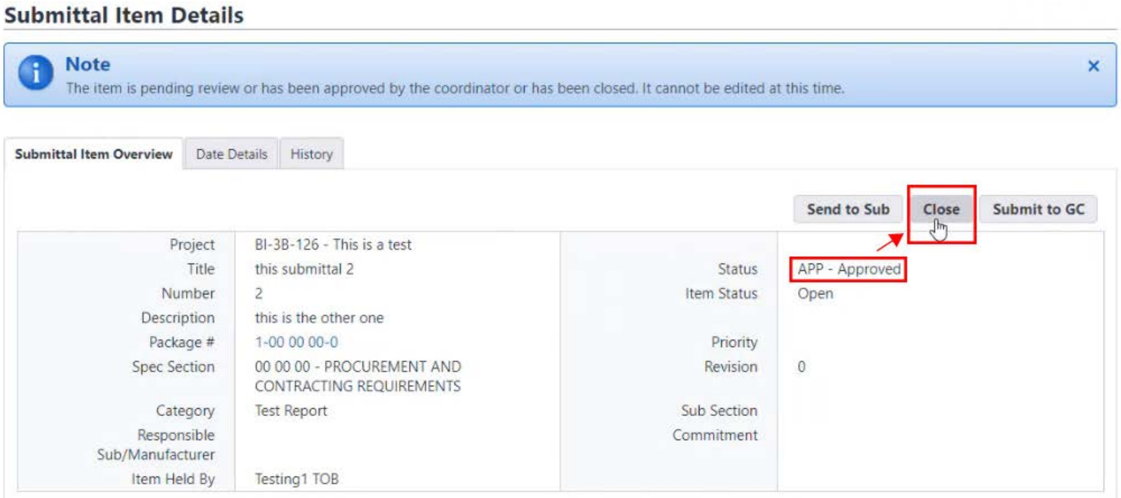
The GC or CMR will receive notification that the submittal package has been returned and can find the submittal package in the Submittal Packages list. Noting that (A) the submittal package is now held by them, as users, (B) the GC or CMR click on the submittal package title or package number.



After opening the package, click on a submittal's title or # to open the submittal, or open the submittal from the Submittal Register.



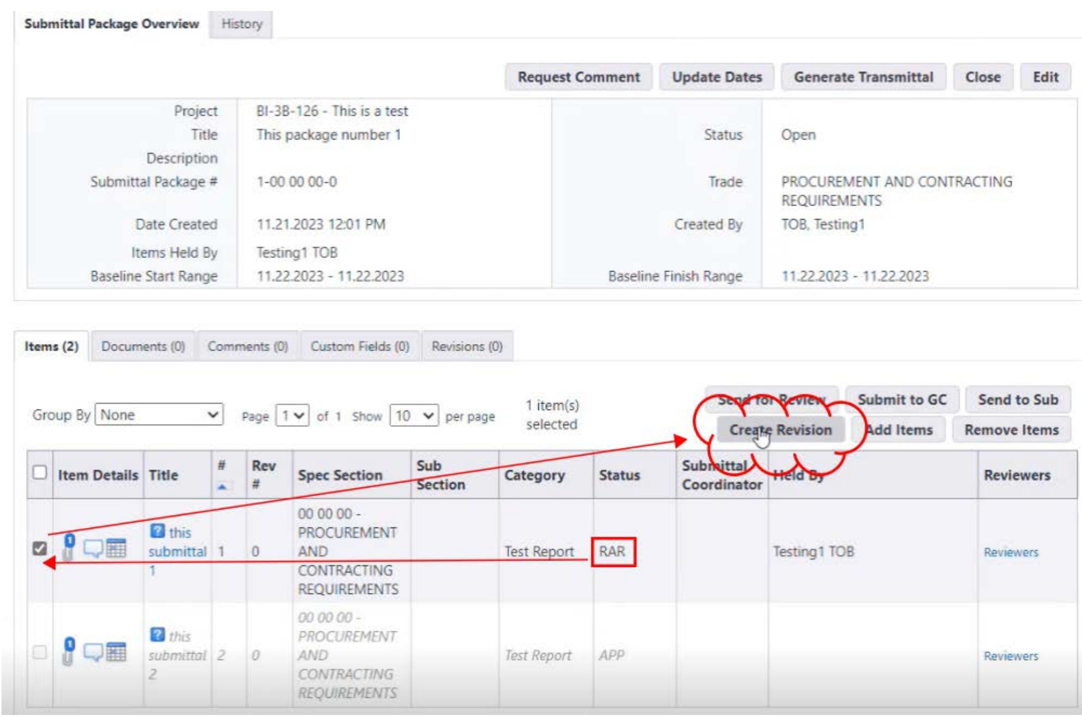
If the submittal is approved, it can be marked by the GC or CMR as closed by clicking the “Close” button. (Note that the “Close” button then changes to a “Re-Open” button, allowing for the submittal to be re-opened.)



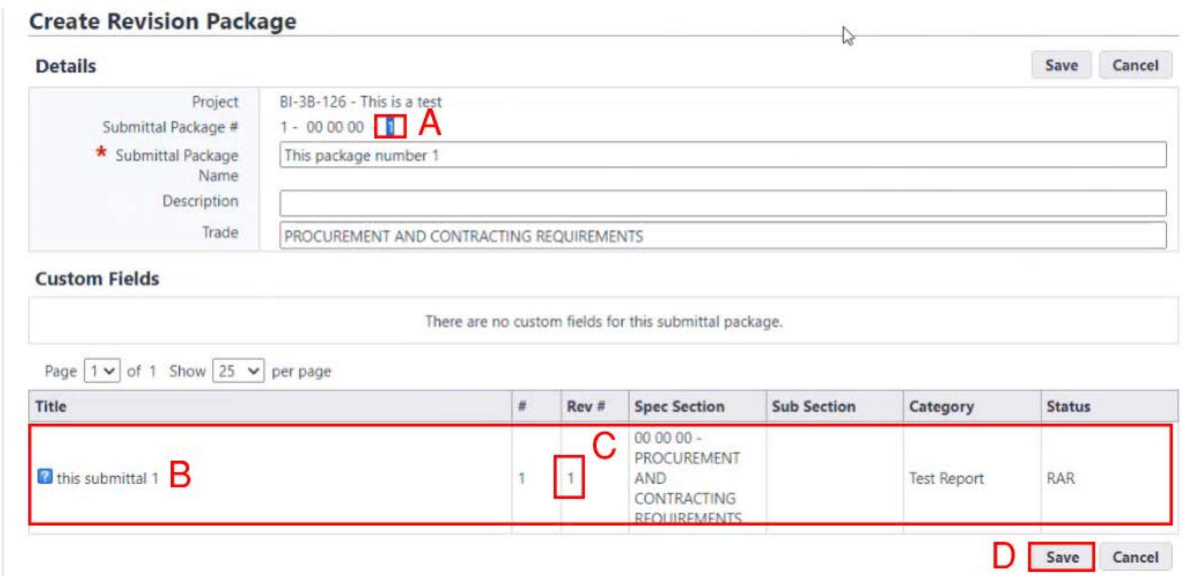
Refer to Section 25.03 for instructions on how to use filtering to list submittals that are Draft, Open and Closed.

25.12 Revision Submittals

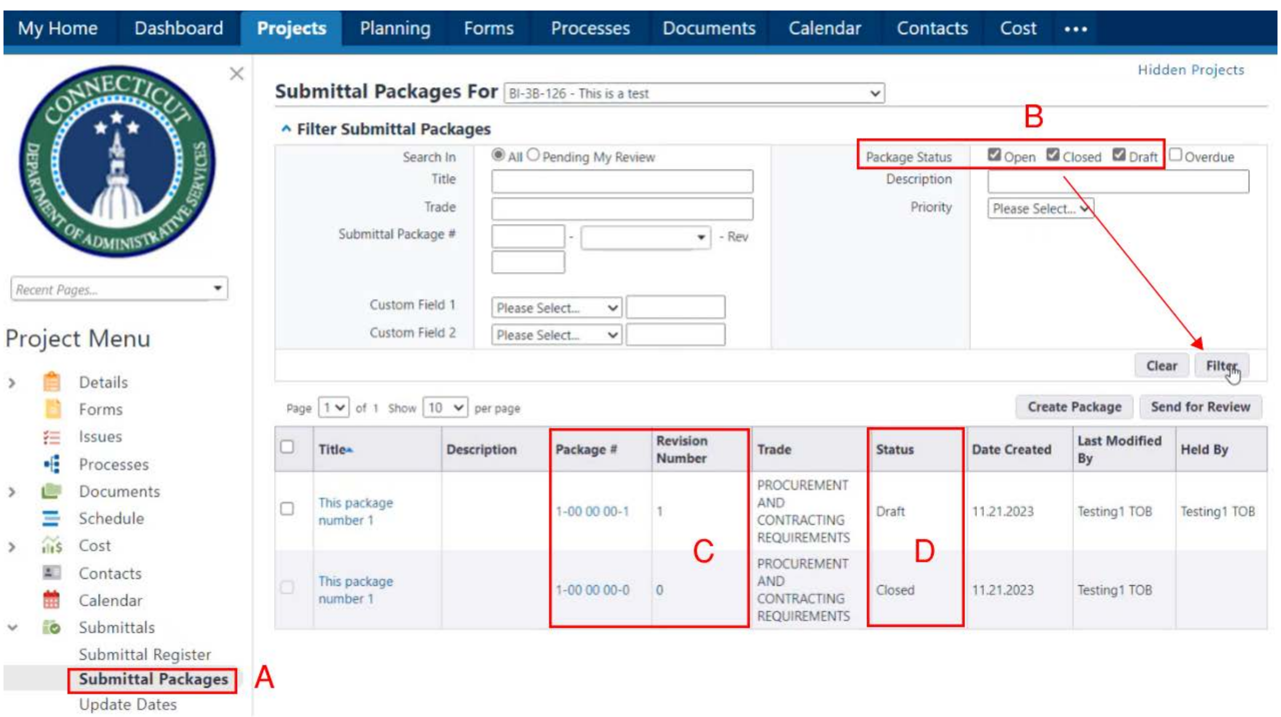
If a submittal package contains one or more submittals that have a “RAR” (Revise and Resubmit) Status, check the box(es) to the left of the submittal(s) and then click the “Create Revision” button.



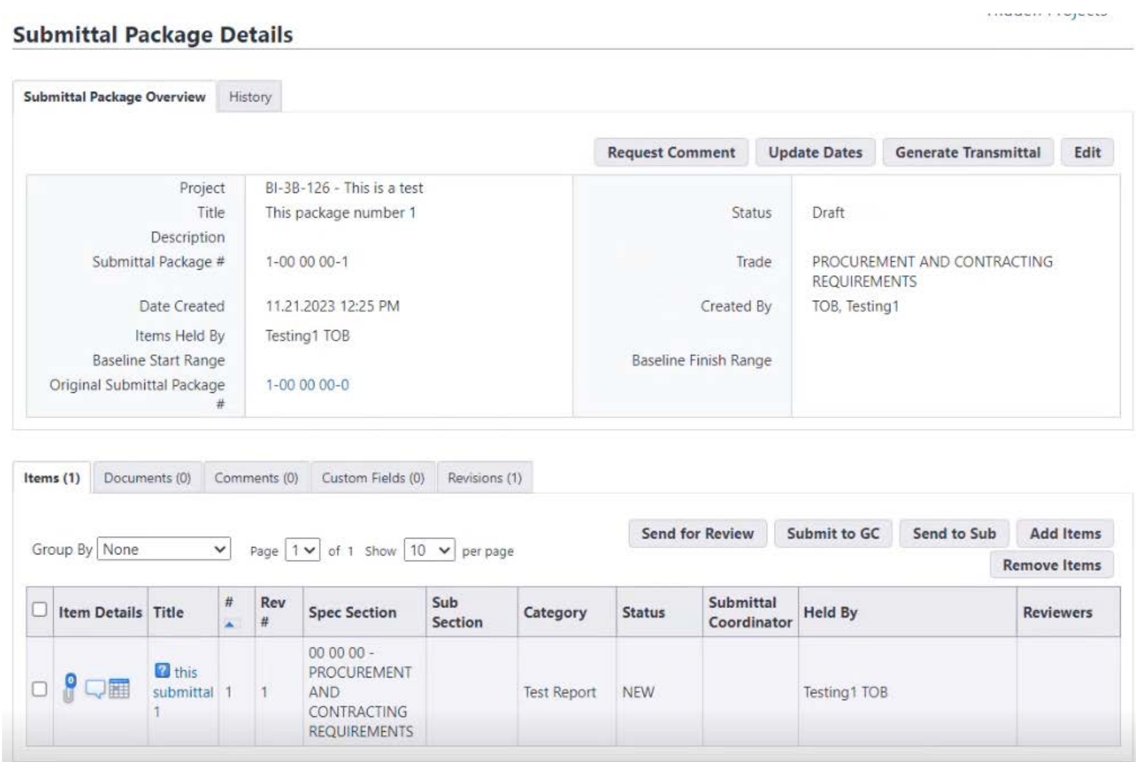
That brings up a screen for the creation of a revised submittal package. The revised package (A) has the same package number as the package being revised, except that the revision number is incremented up by 1; (B) contains a newly created revised submittal (or multiple revised submittals, if multiple submittals require revision); and (C) the revised submittal, itself, is identified by an increased revision number, incremented up by 1. If is all correct, (D) click Save.



The default views in the Submittal Packages list and the Submittal Register will now only show the revised version of each. The original version can still be seen, using the filter controls. For example, (A) in the Submittal Packages list, (B) select the filter options for Open, Closed and Draft to (C) make both the revised and original submittal package visible. The (D) Status of each option will be displayed.



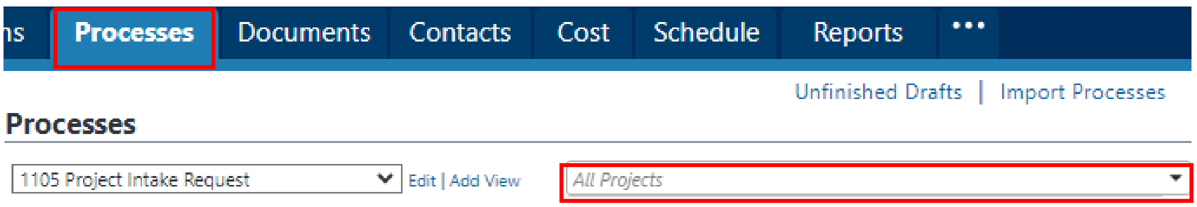
The GC or CMR can access the revised submittal package and upload attachments and comments to the revised submittal, which is now linked to the submittal package. Upon completion, the GC or CMR would follow the steps outlined in Section 25.07 to send the submittal package to the CA.



Section 26: 7989 AA Project Closeout

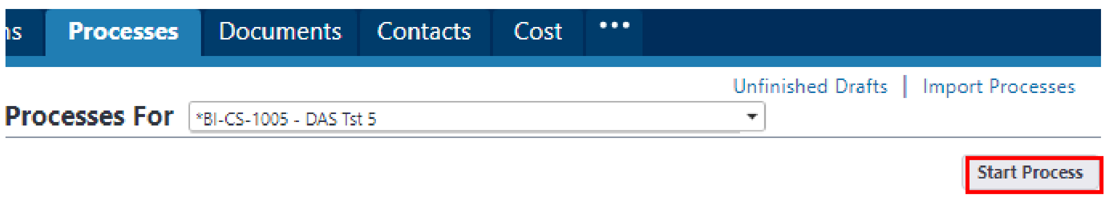
26.01 Accessing the Process

Log in to e-Builder. On your homepage, Go to the "Processes" tab and select the AA Project you want to closeout from the "All Projects" dropdown list.

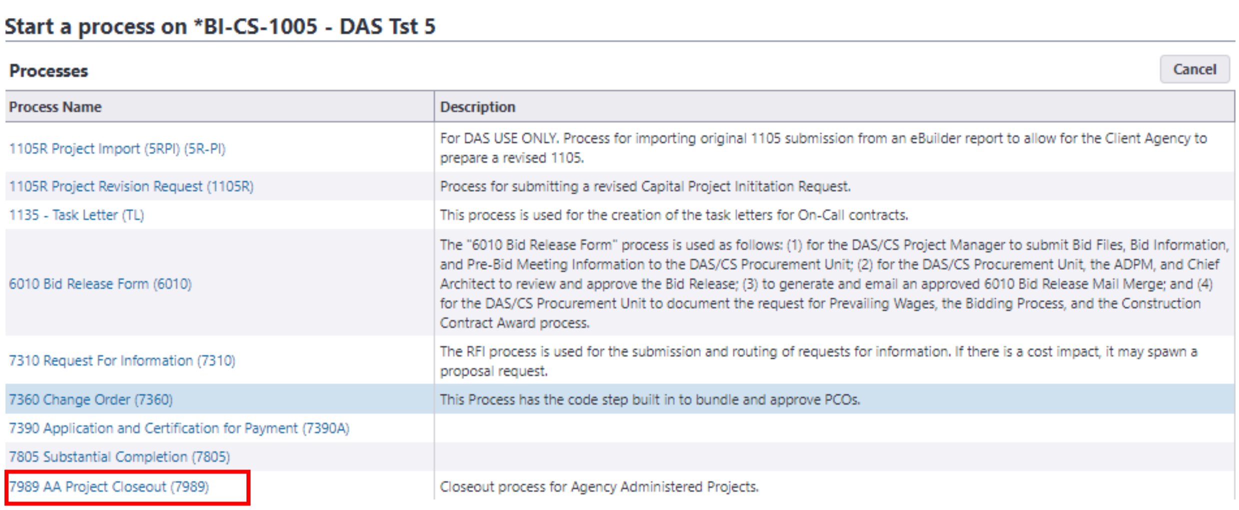


26.02 Form 7989 – AA Project Closeout (Process Initiator)

Click the "Start Process" button.



Click on the link entitled "7989 AA Project Closeout (7989)".

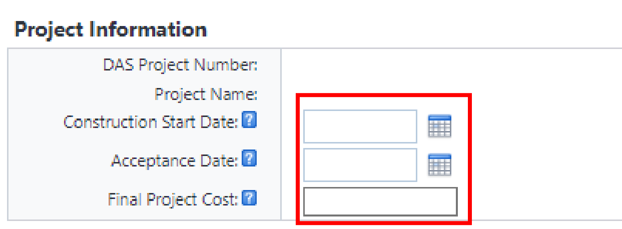

Start a process on *BI-CS-1005 - DAS Tst 5

Processes

Cancel

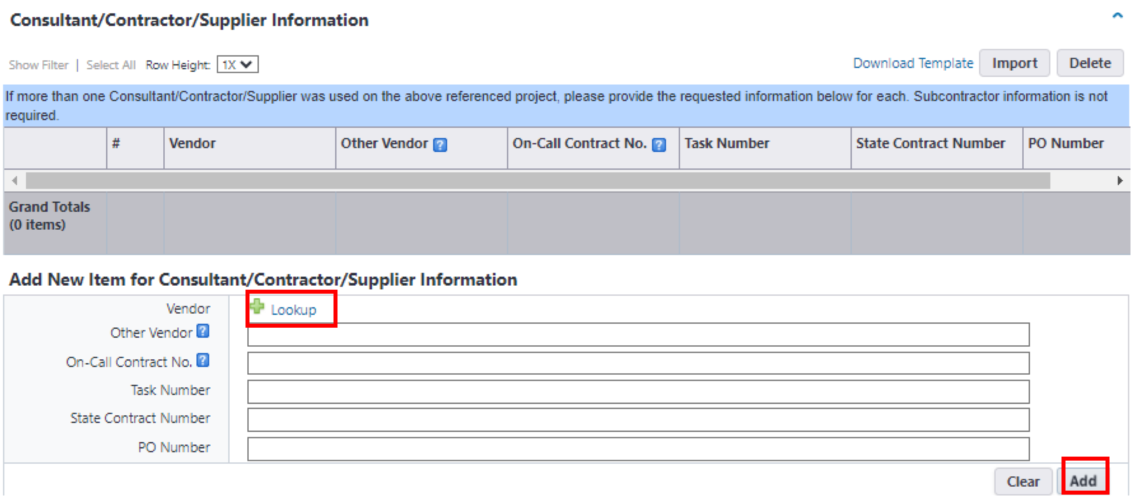
Process Name	Description
1105R Project Import (5RPI) (5R-PI)	For DAS USE ONLY. Process for importing original 1105 submission from an eBuilder report to allow for the Client Agency to prepare a revised 1105.
1105R Project Revision Request (1105R)	Process for submitting a revised Capital Project Inititation Request.
1135 - Task Letter (TL)	This process is used for the creation of the task letters for On-Call contracts.
6010 Bid Release Form (6010)	The "6010 Bid Release Form" process is used as follows: (1) for the DAS/CS Project Manager to submit Bid Files, Bid Information, and Pre-Bid Meeting Information to the DAS/CS Procurement Unit; (2) for the DAS/CS Procurement Unit, the ADPM, and Chief Architect to review and approve the Bid Release; (3) to generate and email an approved 6010 Bid Release Mail Merge; and (4) for the DAS/CS Procurement Unit to document the request for Prevailing Wages, the Bidding Process, and the Construction Contract Award process.
7310 Request For Information (7310)	The RFI process is used for the submission and routing of requests for information. If there is a cost impact, it may spawn a proposal request.
7360 Change Order (7360)	This Process has the code step built in to bundle and approve PCOs.
7390 Application and Certification for Payment (7390A)	
7805 Substantial Completion (7805)	
7989 AA Project Closeout (7989)	Closeout process for Agency Administered Projects.

Read the "General Instructions" and fill in the applicable fields under "Project Information".

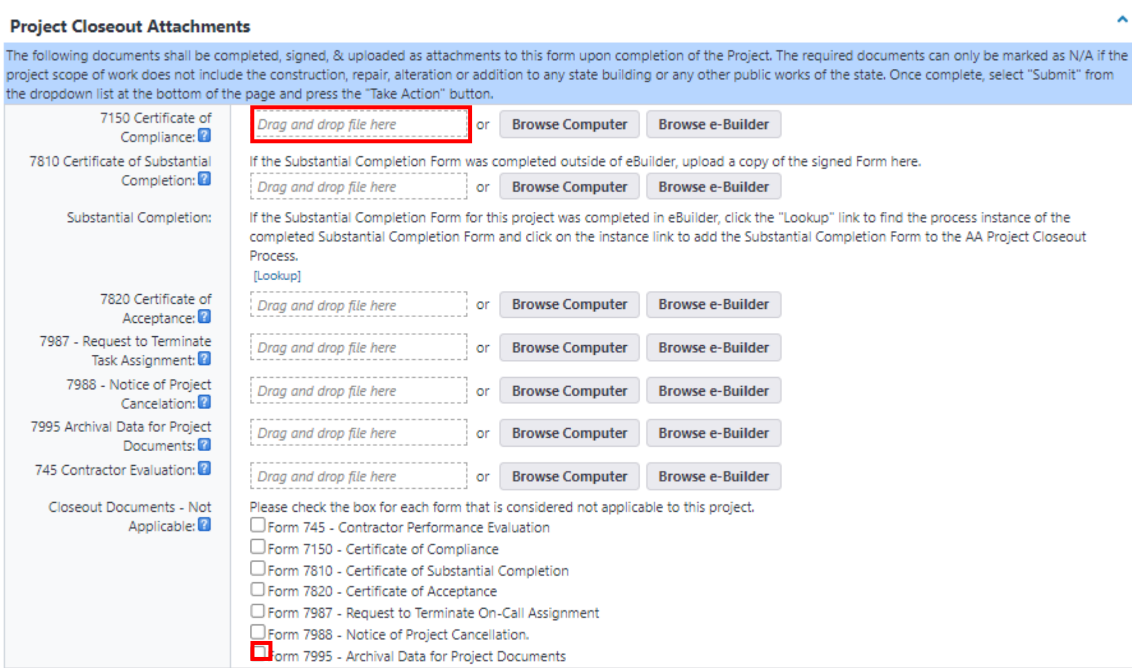


Complete the section entitled “Consultant/Contractor/Supplier Information” under “Add New Item for Consultant/Contractor/Supplier Information”. The first vendor input should be the project On-Call Consultant. To add a vendor, click on the “Lookup” link in the Vendor field to find the project On-Call Consultant. Then, provide the “On-Call Contract No.” and “Task Number” and click the “Add” button.

Next, click on the “Lookup” link in the “Vendor” field to select any other Contractors that provided services on the subject project, the Contract Number and PO Number for the subject Contractor. If the Contractor is not listed in “Lookup”, provide the name of the Contractor in the “Other Vendor” field and click the “Add” button upon completion. Repeat this process for each Contractor having performed Work on the project.



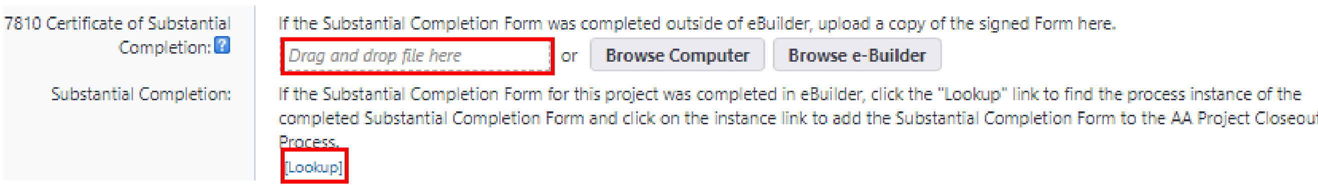
Complete the section entitled “Project Closeout Supporting Documentation”. Drag and drop executed copies of the requested forms into their respective fields.



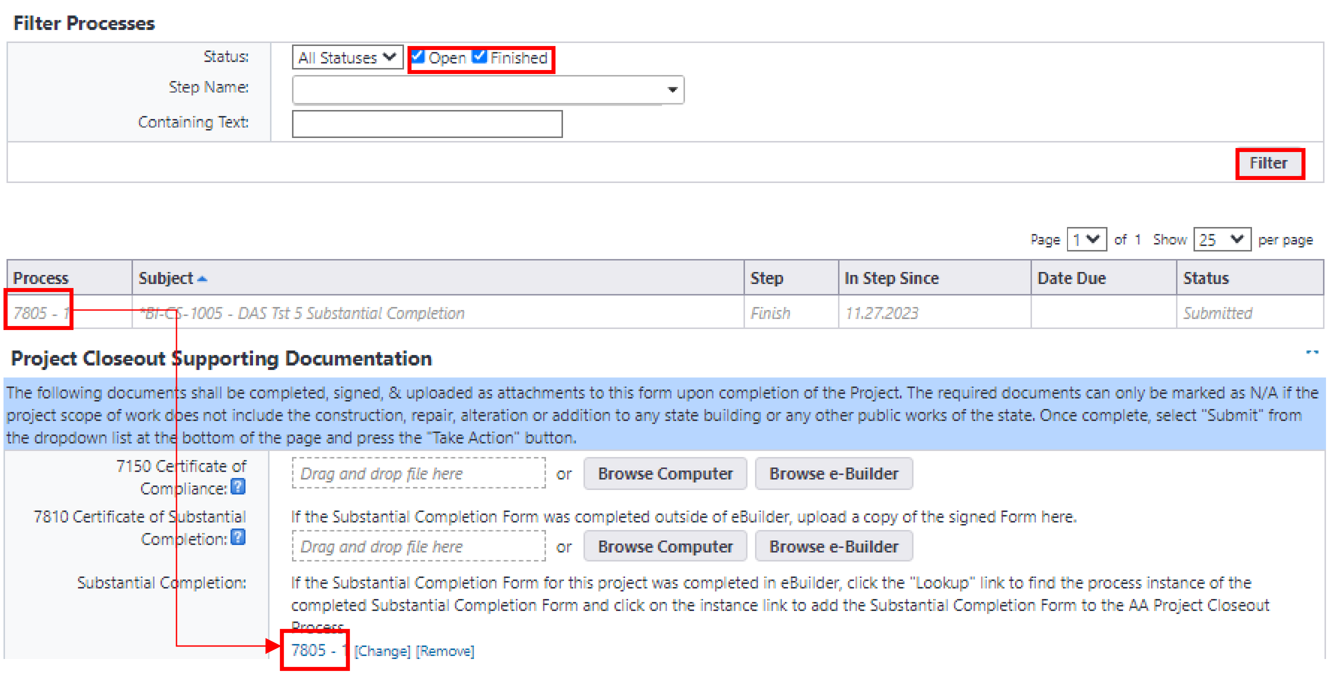
If the form submission is not applicable to this project (the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state), then check the appropriate “Closeout Documents – Not Applicable” field.

* Note that there is a field to upload “Form 7810 – Certificate of Substantial Completion”, as well as a field entitled “Substantial Completion”. If you have a paper copy of the substantial completion form, it should be uploaded to the respective field.

  If the substantial completion form was completed in eBuilder, click on the “Lookup” link in the “Substantial Completion” field to open the “Filter Processes” page for the subject project.



Make sure both the “Open” and “Finished” boxes are checked and click the “Filter” button. The process link to the subject project’s substantial completion form will appear in the process table. Click on the link in the “Process” column for the subject substantial completion form to be added to the closeout supporting documents.

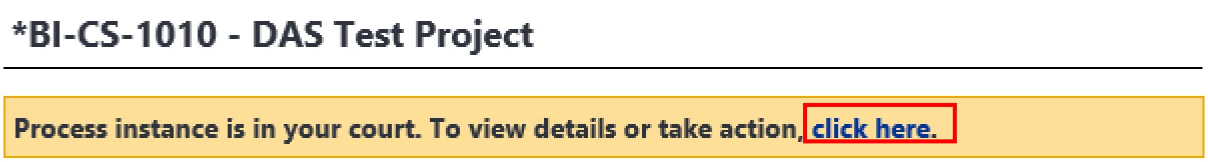


Upon completion, scroll down to the bottom of the page and click the “Take Action” button to submit your project closeout documentation. If the project closeout submission is considered incomplete, the submission will be returned to the Process Initiator to provide additional information. Instructions for the additional information required will be noted under the “Comments” tab. If the project closeout submission is complete, no further action is necessary.

26.03 Closeout Package Review (CSS)

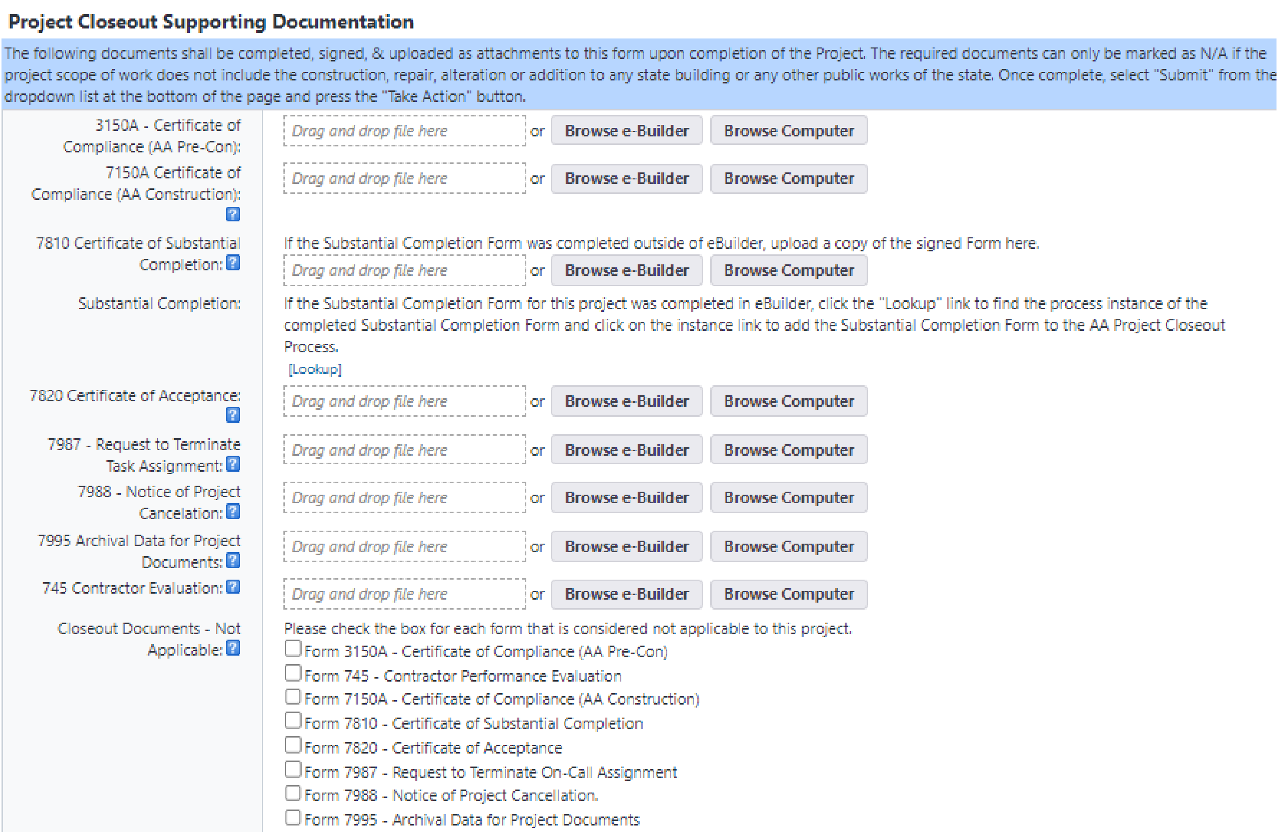
CSS will receive an email from eBuilder as notification that a Project Closeout Package has been submitted for review.

To access the project process, click on the link provided in the email.


*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, click here.

After opening the process instance, review the Form 7989 submission for completeness. Thoroughly review the “Project Closeout Supporting Documentation” section to ensure all applicable documents have been attached and signed by the respective authorized signatories, and all documents that are not applicable have been checked off accordingly.


Project Closeout Supporting Documentation

The following documents shall be completed, signed, & uploaded as attachments to this form upon completion of the Project. The required documents can only be marked as N/A if the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state. Once complete, select "Submit" from the dropdown list at the bottom of the page and press the "Take Action" button.

3150A - Certificate of Compliance (AA Pre-Con):	Drag and drop file here or Browse e-Builder Browse Computer
7150A Certificate of Compliance (AA Construction):	Drag and drop file here or Browse e-Builder Browse Computer
7810 Certificate of Substantial Completion:	If the Substantial Completion Form was completed outside of eBuilder, upload a copy of the signed Form here. Drag and drop file here or Browse e-Builder Browse Computer
Substantial Completion:	If the Substantial Completion Form for this project was completed in eBuilder, click the "Lookup" link to find the process instance of the completed Substantial Completion Form and click on the instance link to add the Substantial Completion Form to the AA Project Closeout Process. [Lookup]
7820 Certificate of Acceptance:	Drag and drop file here or Browse e-Builder Browse Computer
7987 - Request to Terminate Task Assignment:	Drag and drop file here or Browse e-Builder Browse Computer
7988 - Notice of Project Cancelation:	Drag and drop file here or Browse e-Builder Browse Computer
7995 Archival Data for Project Documents:	Drag and drop file here or Browse e-Builder Browse Computer
745 Contractor Evaluation:	Drag and drop file here or Browse e-Builder Browse Computer
Closeout Documents - Not Applicable:	Please check the box for each form that is considered not applicable to this project. ☐ Form 3150A - Certificate of Compliance (AA Pre-Con) ☐ Form 745 - Contractor Performance Evaluation ☐ Form 7150A - Certificate of Compliance (AA Construction) ☐ Form 7810 - Certificate of Substantial Completion ☐ Form 7820 - Certificate of Acceptance ☐ Form 7987 - Request to Terminate On-Call Assignment ☐ Form 7988 - Notice of Project Cancellation. ☐ Form 7995 - Archival Data for Project Documents

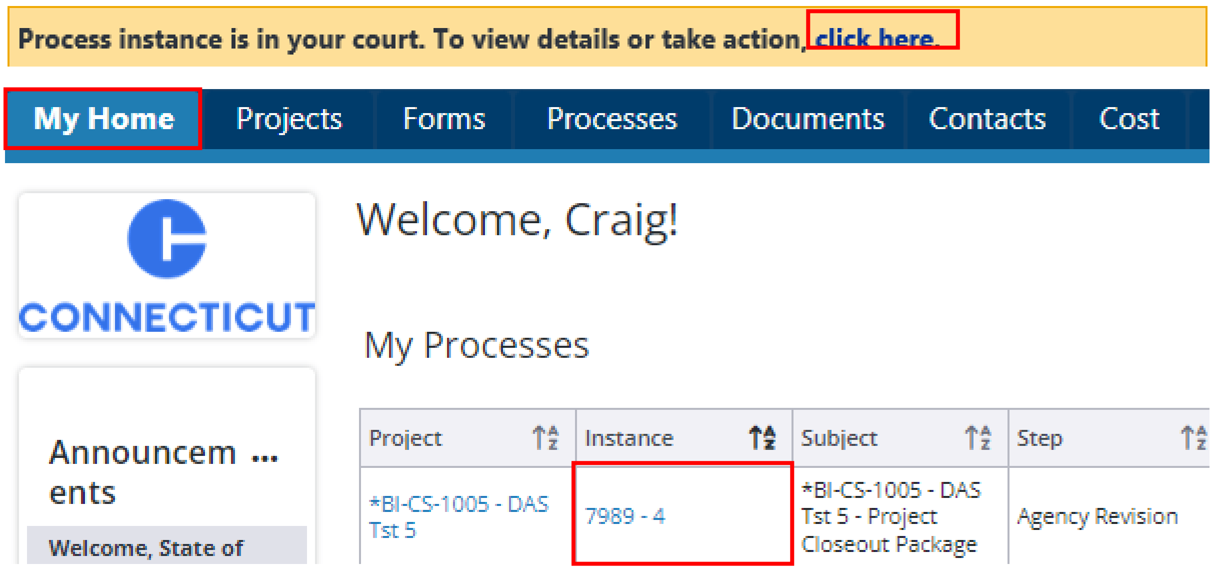
If all required documents are complete with the appropriate signatures and all questions have been appropriately answered, select "Approve" from the dropdown list below and press the "Take Action" button.

If any items are incomplete or missing from the project closeout submission, select "Return" from the dropdown list at the bottom of the page and press the "Take Action" button. You will then be prompted to provide a comment where you should note the incomplete or missing information. After entering the comment, press the "Return" button.

26.04 Closeout Package Revision (Agency PM)

If the project closeout package submitted is deemed incomplete, the Project PM will receive an email from eBuilder as notification that the Project Closeout Package requires additional information.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.



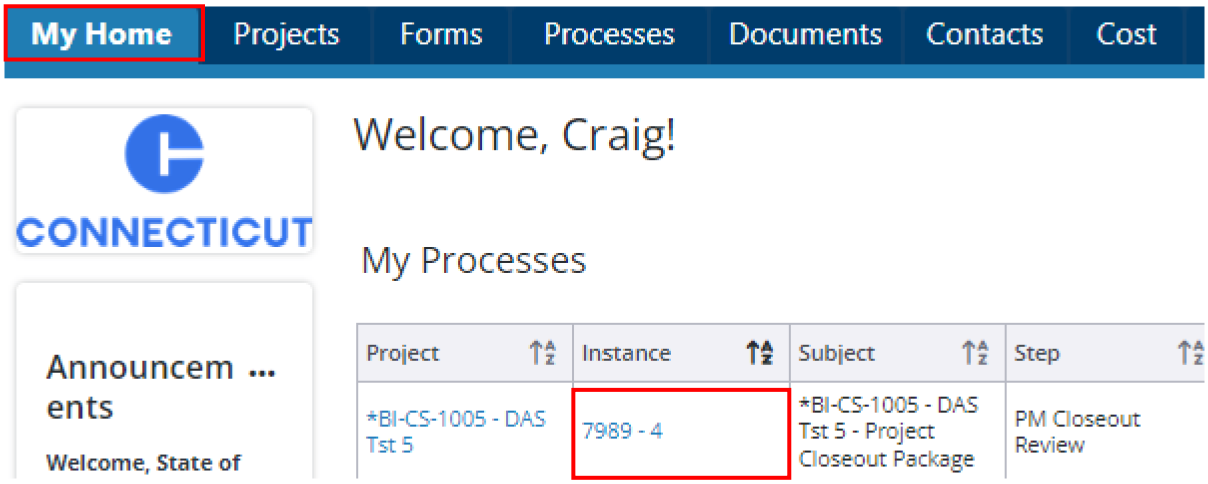
After opening the Project instance, refer to the "Comments" tab for specific requirements needed to complete the submission. Ensure these requirements are met before proceeding.

After addressing all requirements, click the "Take Action" button. This will prompt you to respond to any previous comments and confirm that the submission is now complete, then click "Submit".

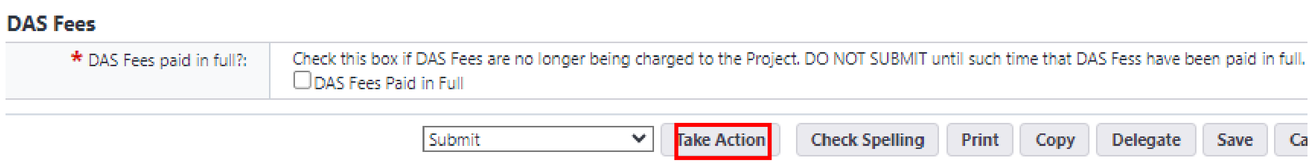
26.05 Closeout Package Review (DAS/RECS PM)

After the Agency PM has submitted all of the required closeout documents for an AA Project and after CSS has approved the submission as complete, the DAS/RECS PM assigned to the project will receive an email notification from eBuilder to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.



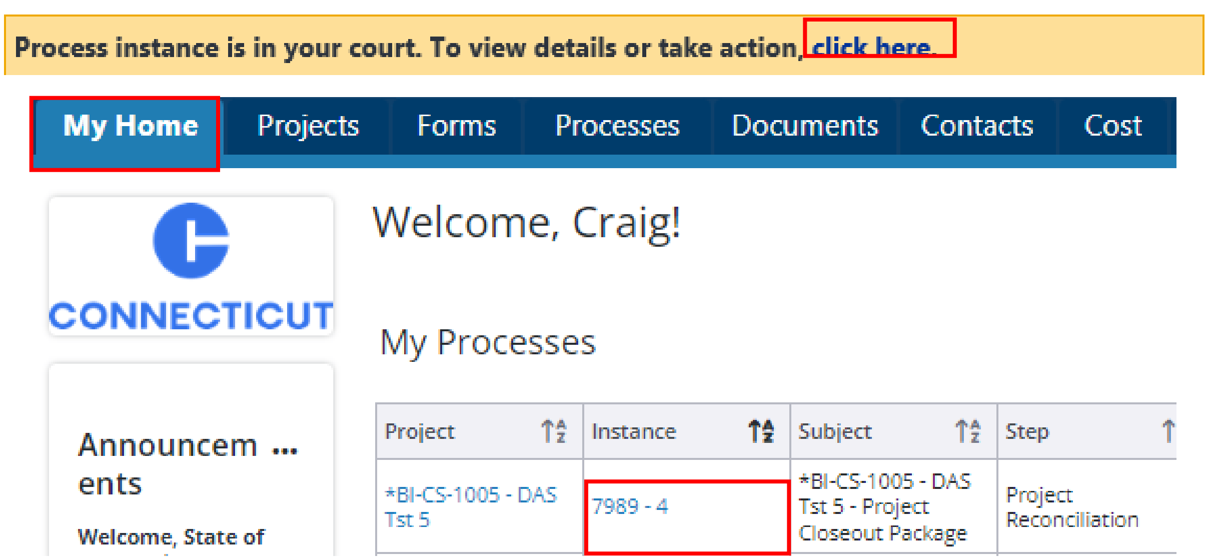
The PM should scroll down to the section entitled “DAS Fees” and answer the question accordingly. If DAS Fees have been paid in full, click the “Take Action” button.



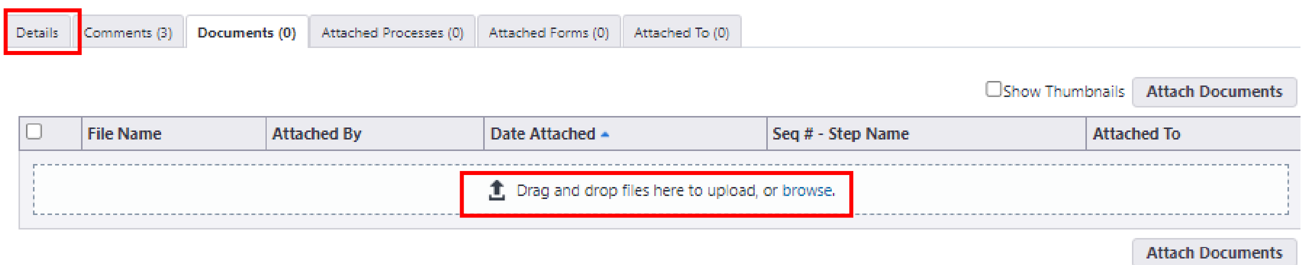
26.06 Reconciliation Review (Accounts Examiner)

The Accounts Examiner will receive an email notification from eBuilder as notification that the project is ready for internal audit after the client agency has submitted the required closeout documentation and after the DAS/RECS PM assigned to the project has confirmed that DAS Fees are no longer being charged to the project.

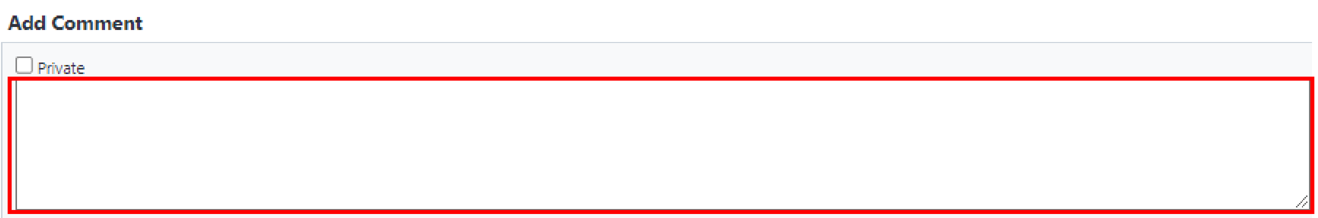
To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.



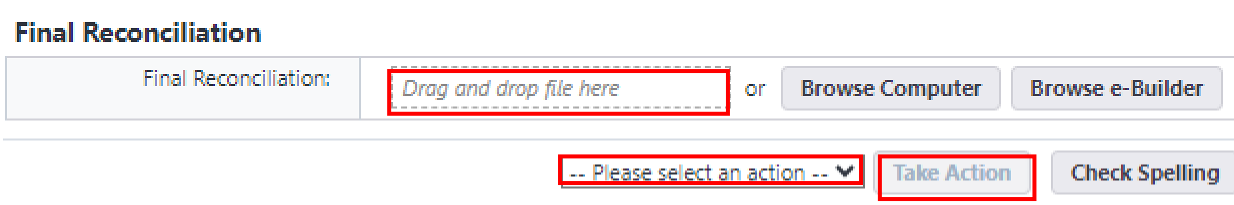
The Accounts Examiner should now conduct its review of the project financials to reconcile with CORE CT to formally close out in eBuilder. After completing the review, if it is determined that additional input is required from the DAS/RECS PM and/or the Business Office (BO) to complete the reconciliation, the Accounts Examiner should return to the process instance to send it to either the “PM” or the “BO” for the required information. To include documentation for the PM or BO to review as part of this process, click on the “Documents” tab, and drag and drop said documentation to the space provided. Then, click on the “Details” tab to return to the closeout application process.



To forward the process instance to the PM or BO, scroll down to the bottom of the page and either select “PM” or “BO” from the dropdown list next to the “Take Action” button and click “Take Action”. A prompt will then appear so that you can add a comment. In the comment box, provide a description of what information and/or documentation is required to complete the reconciliation. After adding the comment, click the “PM” or “BO” button to send the process instance to the respective party.



If the reconciliation is complete and the project can be closed in eBuilder, upload a copy of the final reconciliation to the "Final Reconciliation" field in the “Final Reconciliation” section, select "Complete" from the dropdown list, and click "Take Action".

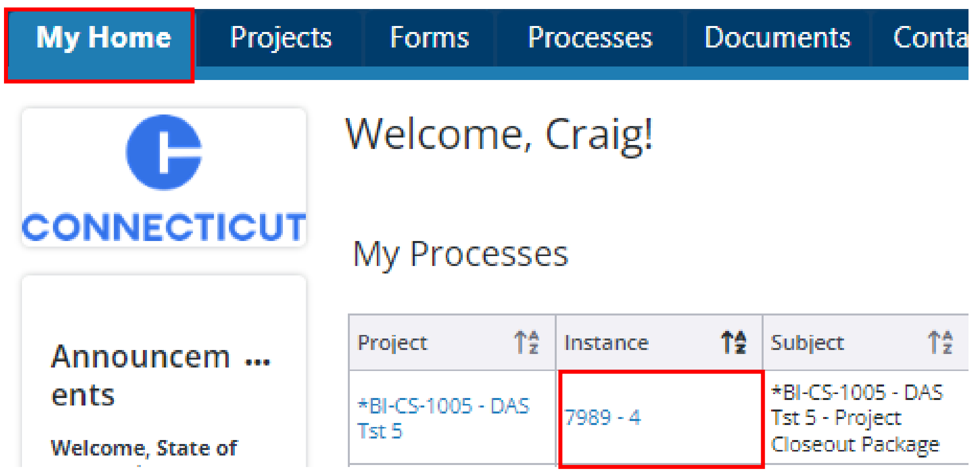


If the process instance has been returned by either the PM or the BO, refer to the “Comments” tab to see comments provided by previous actors and refer to the “Documents” tab to see additional documents that have been uploaded. Proceed with the steps above until the process is complete.

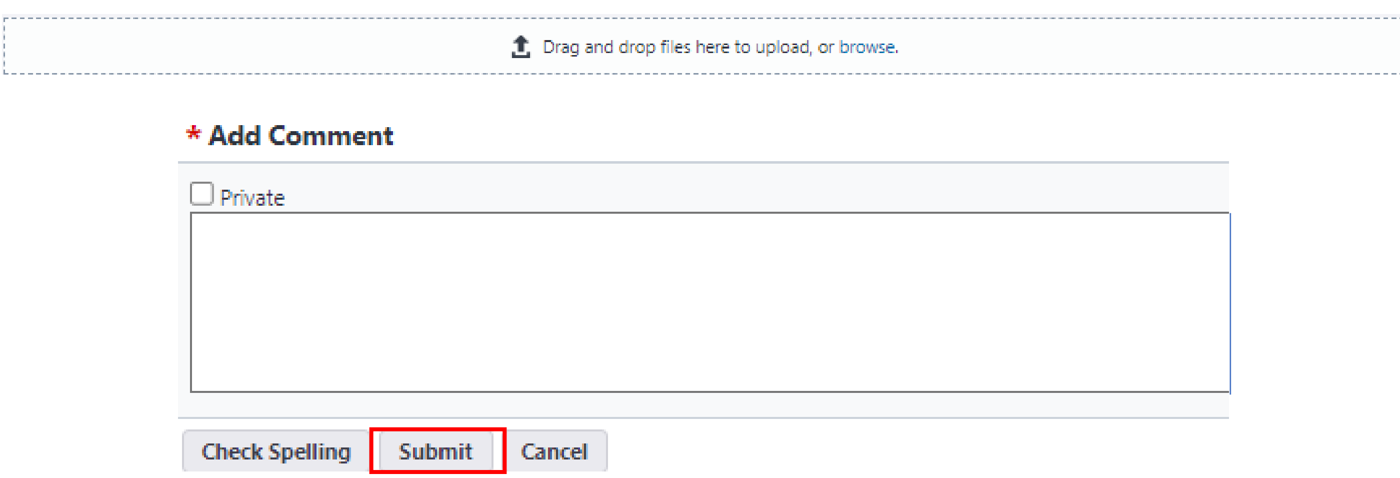
26.07 PM Reconciliation Review (PM)

The PM assigned to an Agency Administered project will receive an email notification from eBuilder if the Accounts Examiner requires additional information and/or documentation to reconcile the project financing.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.



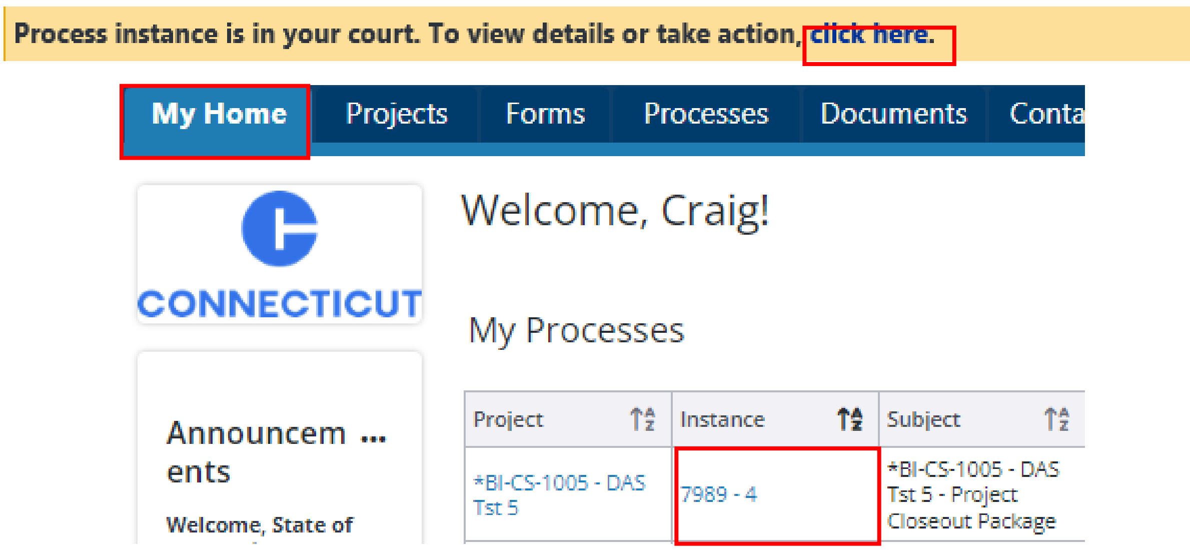
After opening the process instance, click on the “Comments” tab to review comments provided by the Accounts Examiner and to get direction on what information and/or documentation is required to complete the reconciliation process. If additional documentation is required, upload said documentation to the documents tab. Upon completion, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear to provide a comment response to the Accounts Examiner regarding the submission. Click “Submit” after providing your response.



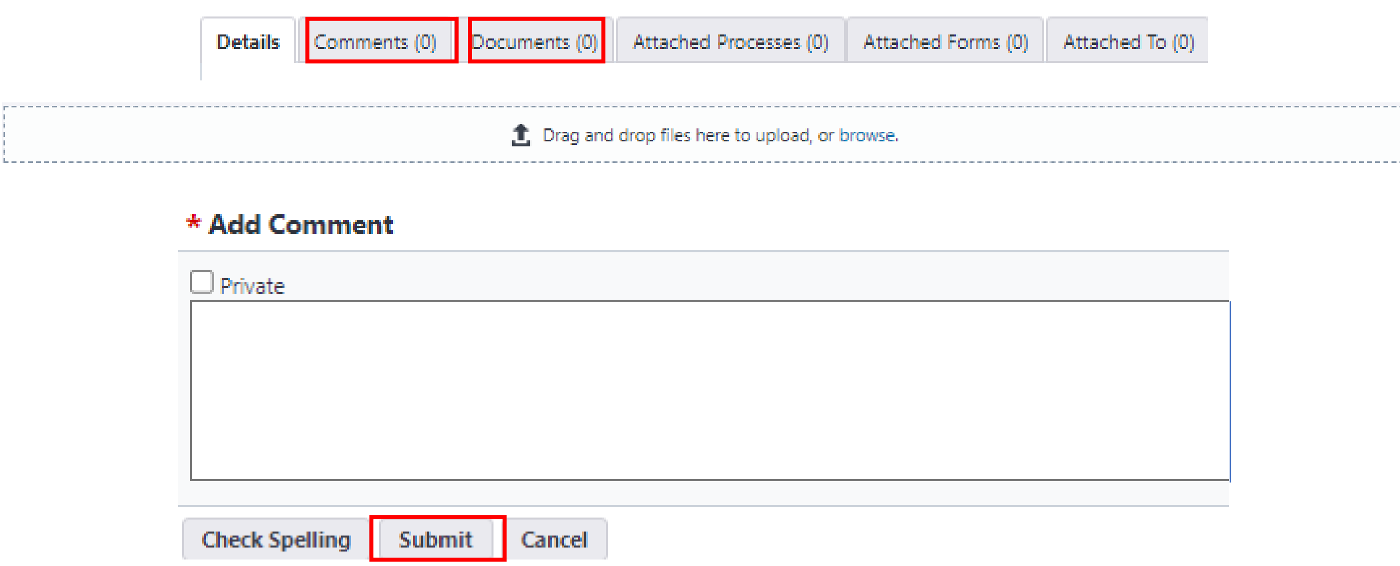
26.07 BO Reconciliation Review (BO)

The Business Office (BO) will receive an email notification from eBuilder if the Accounts Examiner requires assistance in completing the financial reconciliation of an Agency Administered Project.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.



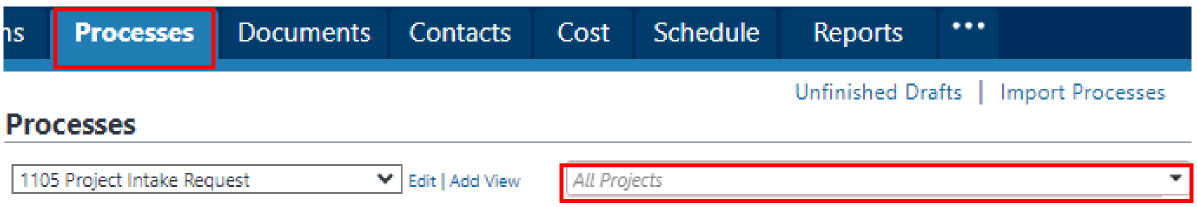
After opening the process instance, click on the "Comments" tab to review comments provided by the Accounts Examiner regarding what is required to complete the reconciliation process. To review related reconciliation documents, click on the "Documents" tab. After completing your review, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear to provide a comment response to the Accounts Examiner regarding the submission. Click "Submit" after providing your response.



Section 27: 7990 Project Closeout

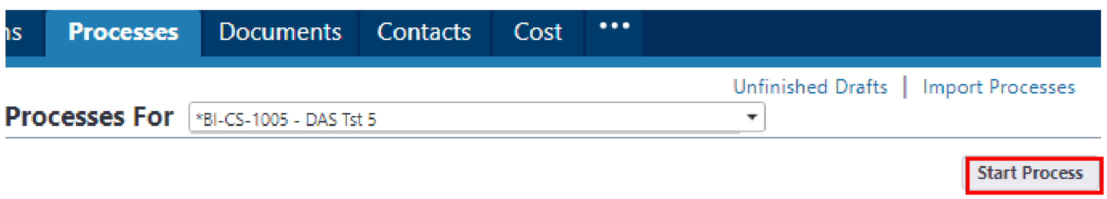
27.01 Accessing the Process

Log in to e-Builder: https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f. On your homepage, Go to the "Processes" tab and select the Project you want to closeout from the "All Projects" dropdown list.



27.02 Form 7990 – Project Closeout (PM)

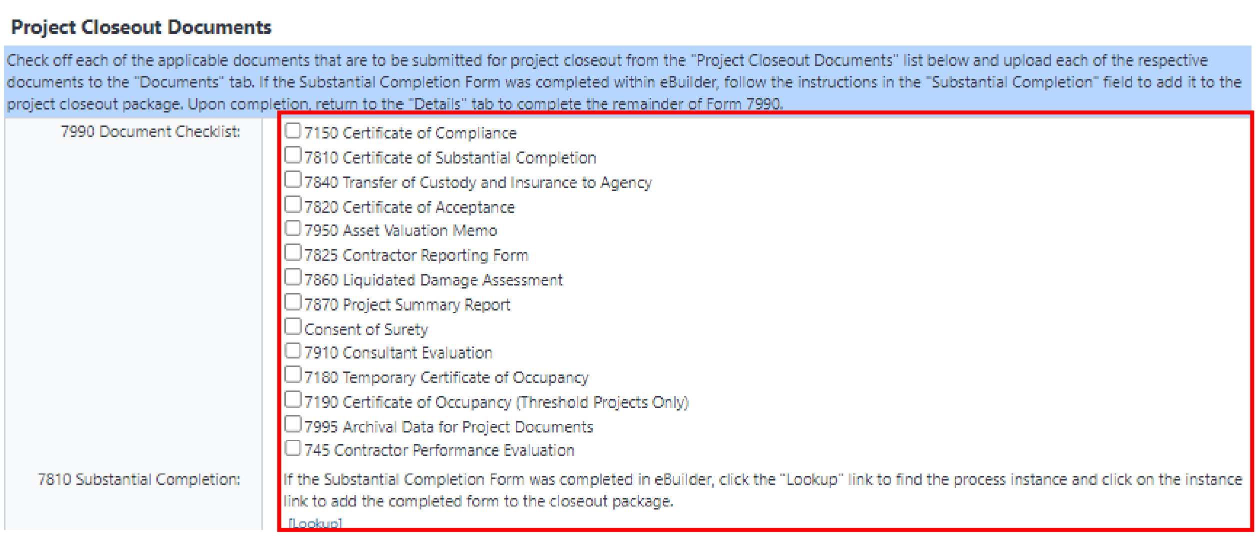
Click the "Start Process" button.



Select "7990 Closeout (7990)" from the list of processes and click the "Start 7990" button.

Begin by filling out the "Subject" line with "Project # - Closeout Package." Follow the instructions provided and ensure that all sections are completed.

Check off each relevant document that is being submitted for project closeout from the list provided in the "Project Closeout Documents" section and upload a copy of each of those documents to the "Documents" tab. If the Substantial Completion Form was completed within eBuilder, follow the guidance in the "Substantial Completion" field to include it in the project closeout package. After completing these steps, return to the "Details" tab to complete the remainder of Form 7990.



Project Closeout Documents

Check off each of the applicable documents that are to be submitted for project closeout from the "Project Closeout Documents" list below and upload each of the respective documents to the "Documents" tab. If the Substantial Completion Form was completed within eBuilder, follow the instructions in the "Substantial Completion" field to add it to the project closeout package. Upon completion, return to the "Details" tab to complete the remainder of Form 7990.

7990 Document Checklist:

- ☐ 7150 Certificate of Compliance
- ☐ 7810 Certificate of Substantial Completion
- ☐ 7840 Transfer of Custody and Insurance to Agency
- ☐ 7820 Certificate of Acceptance
- ☐ 7950 Asset Valuation Memo
- ☐ 7825 Contractor Reporting Form
- ☐ 7860 Liquidated Damage Assessment
- ☐ 7870 Project Summary Report
- ☐ Consent of Surety
- ☐ 7910 Consultant Evaluation
- ☐ 7180 Temporary Certificate of Occupancy
- ☐ 7190 Certificate of Occupancy (Threshold Projects Only)
- ☐ 7995 Archival Data for Project Documents
- ☐ 745 Contractor Performance Evaluation

7810 Substantial Completion: If the Substantial Completion Form was completed in eBuilder, click the "Lookup" link to find the process instance and click on the instance link to add the completed form to the closeout package.
[Lookup]

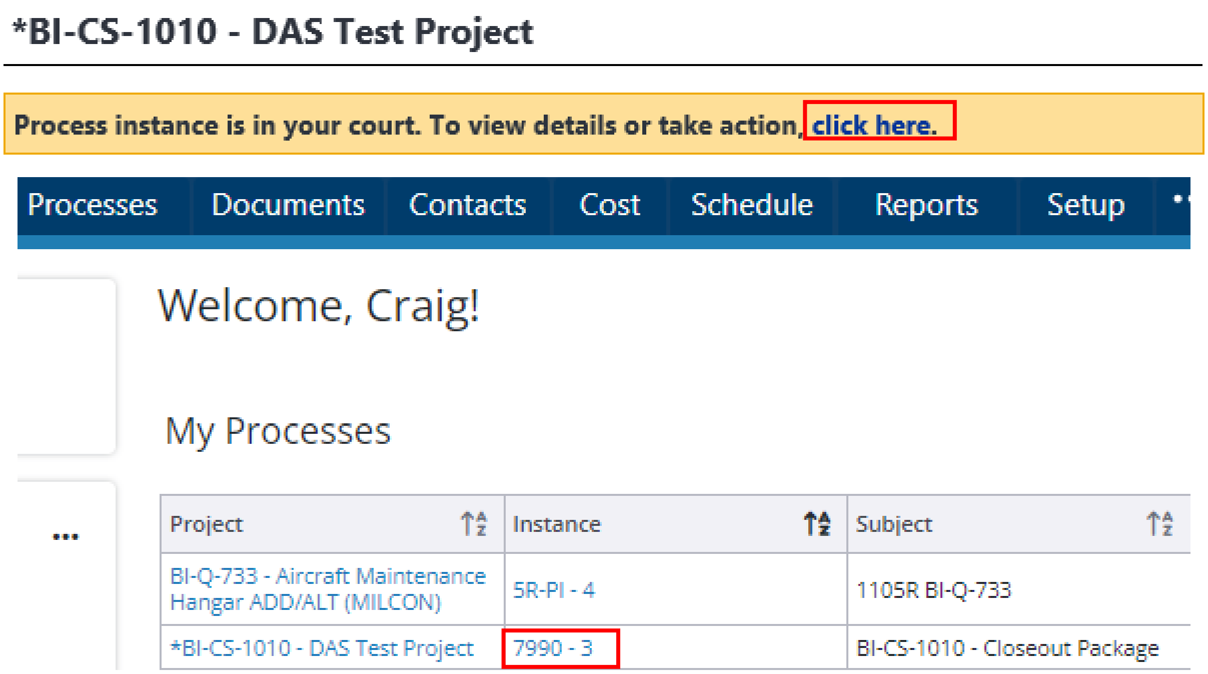
Once finished, click the "Submit" button to proceed.

Note that during this process, the Final Payment Application will be initiated, and all project closeout documents that have been uploaded will be stored in the subject project Closeout Phase file folder.

27.03 Closeout Package Review (CSS)

CSS will receive an email from eBuilder as notification that a Project Closeout Package has been submitted for review.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.



After opening the process instance, review the “7990 Document Checklist” to make sure that all of the required documents have been checked off. Then click on the “Documents” tab to make sure that all of the 7990 Checklist Documents have been uploaded to the tab, the document submissions are filled out in their entirety and have the required authorized signatures.

Upon completion, return to the “Details” tab and review the “Percent for Art” and the “CHRO Contract Compliance” sections, to verify that all of the question have been fully answered.

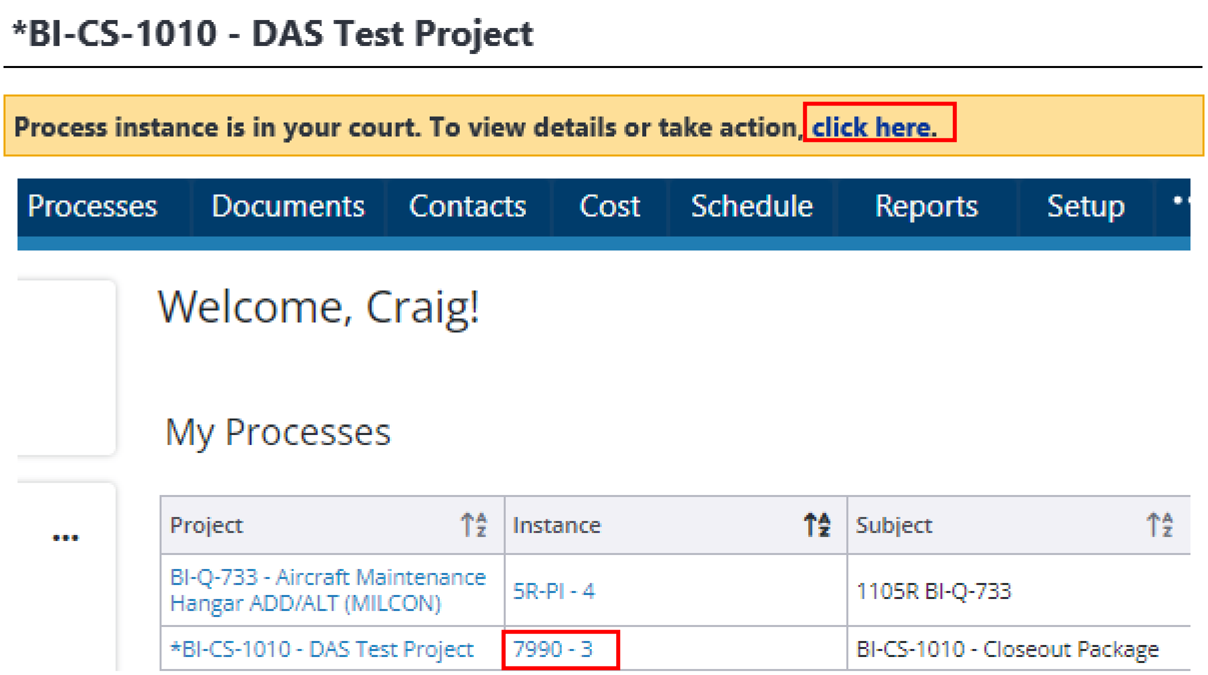
If all necessary documents are complete with the appropriate signatures, and all questions are answered as required, proceed to the bottom of the page and select "Approve" from the dropdown list, next to the “Take Action” button and then press the "Take Action" button. If any items are found to be incomplete or missing from the project closeout submission, select "Revise" from the dropdown list and press the "Take

Action" button. You will be prompted to provide a comment detailing any incomplete or missing information. Click the "Revise" button after providing your comment.

27.03 Closeout Package Revision (PM)

If the project closeout package submitted is deemed incomplete, the Project PM will receive an email from eBuilder as notification that the Project Closeout Package requires additional information.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.



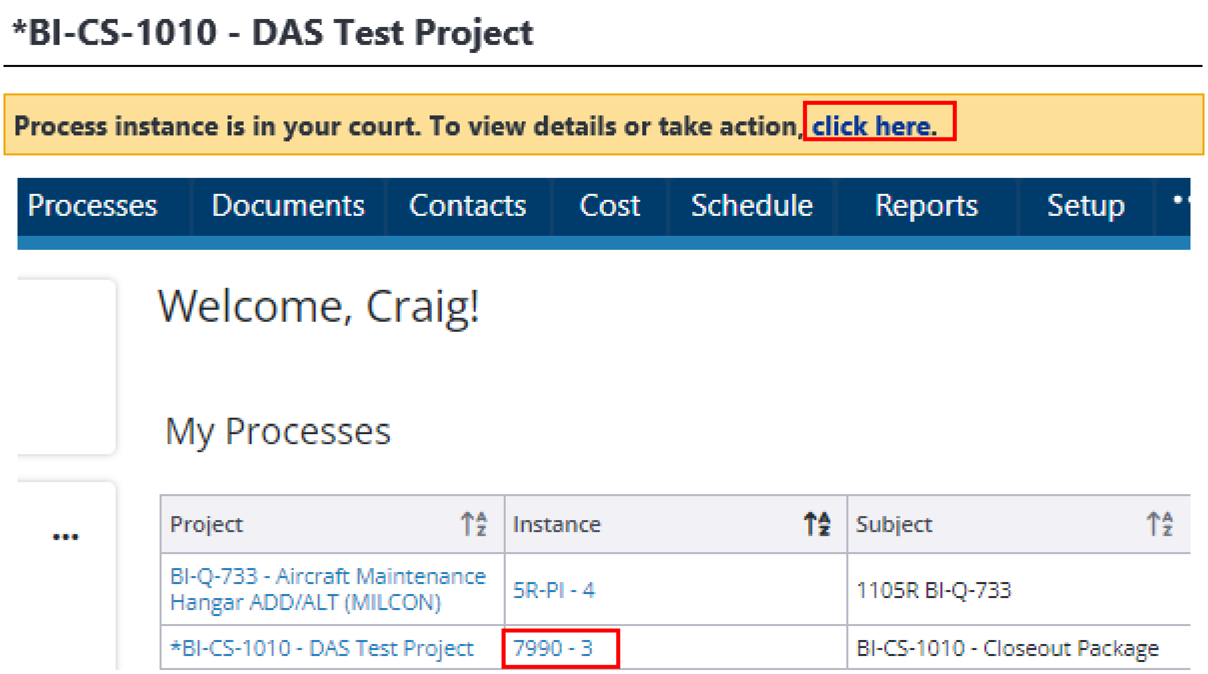
After opening the Project instance, refer to the "Comments" tab for specific requirements needed to complete the submission. Ensure these requirements are met before proceeding.

After addressing all requirements, click the "Take Action" button. This will prompt you to respond to any previous comments and confirm that the submission is now complete, then click “Submit”.

27.04 Closeout Package Review (ADPM)

If the project closeout package is deemed complete by CSS, the Project ADPM will receive an email from eBuilder as notification that the Project Closeout Package is ready for their review.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

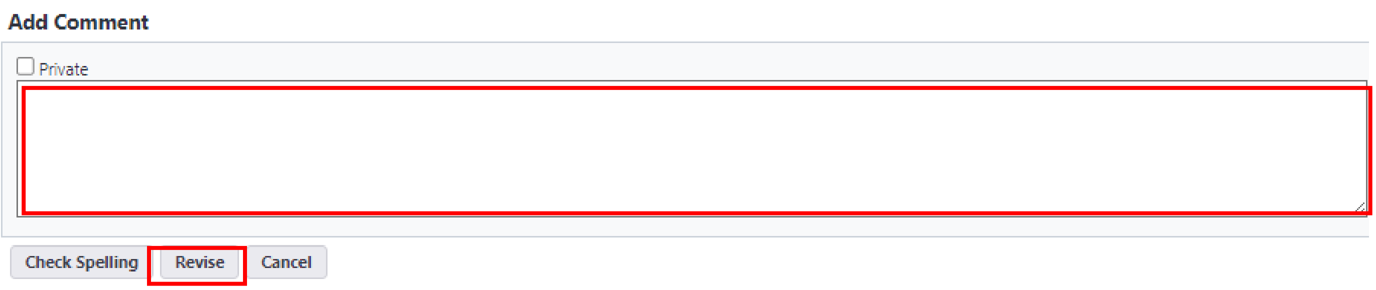


After opening the Project instance, refer to the "Comments" tab to review previous correspondence regarding the submission.

Then, return to the “Details” tab to conduct your own review to verify that the project closeout package is indeed complete and ready for final payment processing. To review the Project Closeout Package in its entirety, double click on the PDF in the “Closeout Package” field in the “Project Closeout Documents” section.

If everything is in order, scroll to the bottom of the page and select "Approve" from the dropdown list. Then, press the "Take Action" button to proceed. If any items are found to be incomplete or missing, select "Revise" to return the package to the Project PM for further action. If the revisions require additional review by CSS, select "CSS" for further review.

If either "Revise" or "CSS" is selected, you will be prompted to provide a comment where you can provide additional direction. Once you have entered your comment, click the "Revise" or "CSS" button respectively to forward the submission package to the appropriate party.



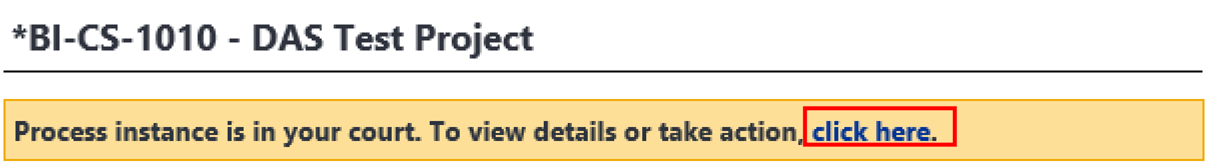
27.05 Final Payment Application (GC/CMR)

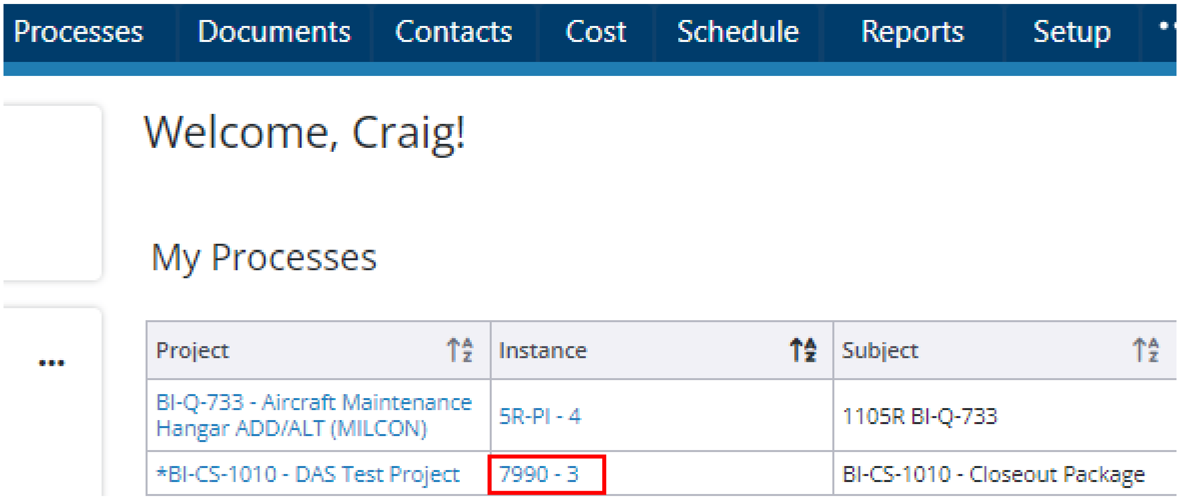
Refer to Section 19F - 7390 Application and Certification for Payment – Final Payment Application.

27.06 Final Payment (BO)

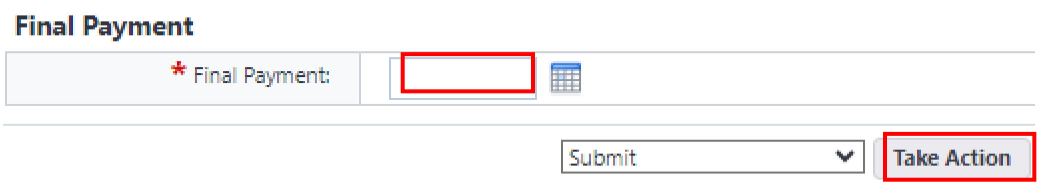
If the project closeout package is deemed complete and the final payment has been submitted for processing, the Business Office (BO) will receive an email from eBuilder as notification to confirm the final payment has been made.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.





After opening the Project instance, go to the “Final Payment” section and input the date the “Final Payment” was made in the field with the same name. Upon completion, click the “Take Action” button.

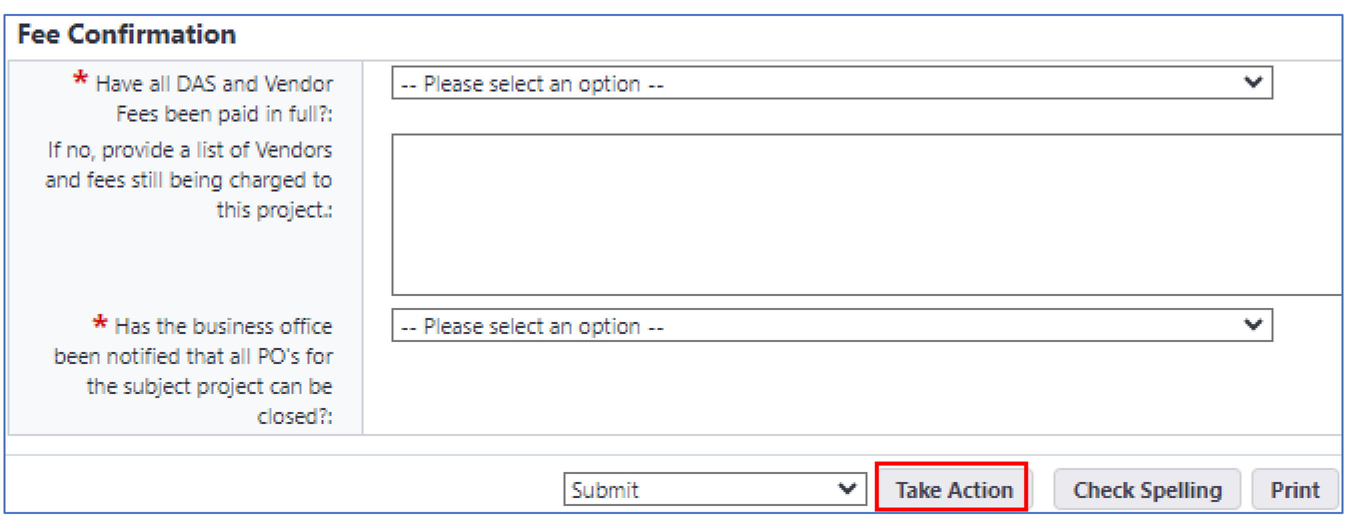


27.07 Fee Confirmation (PM)

After the Final Payment Application has been processed and the fee paid, the PM will receive an email from eBuilder as notification that the final payment has been made.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

After opening the process instance, scroll down to the “Fee Confirmation” section and complete the section in its entirety. Upon completion, click the “Take Action” button to submit to the BO to close all Project POs.



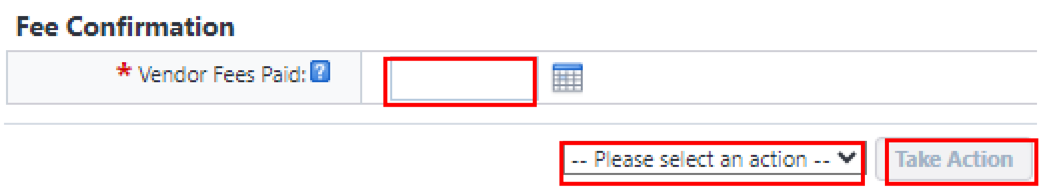
27.08 Close POs (BO)

After the PM has confirmed that all Vendor Fees and all DAS Fees have been paid in full, the BO will receive an email from eBuilder as notification that the BO can proceed to close all vendor Purchase Orders (POs) associated with the project.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

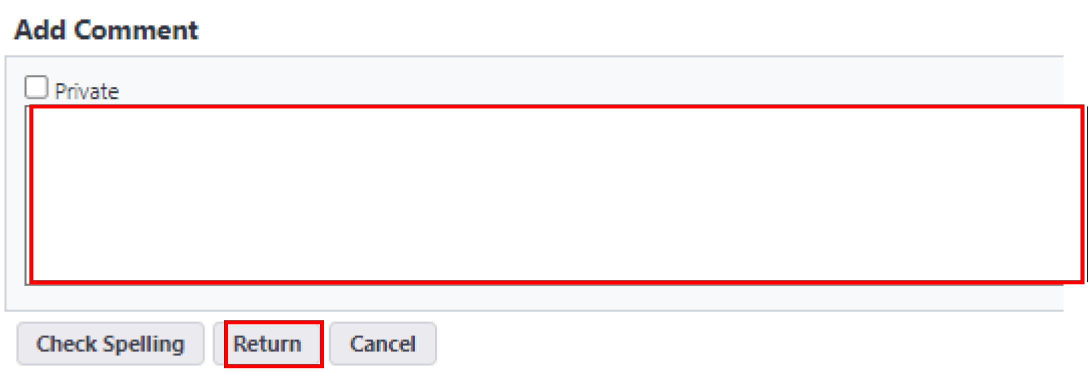
Prior to reviewing the Project Payment Schedule in CORE to ensure that all Vendor and DAS Fees have been paid in full and before all POs are closed, click on the "Comments" tab to review previous comments regarding the Project Closeout Submission Package, which may be of use in closing the subject POs.

If all vendors have been paid and all POs can be closed, input the date the last vendor payment was made in the "Fee Confirmation" section to certify that all POs have been closed. Once this is done, scroll to the bottom of the page and select "Submit" from the dropdown list and click the "Take Action" button to forward the submission to DAS Accounting for project reconciliation.



If after review of the Project Payment Schedule in CORE, it is determined that there are any outstanding fees to be paid or there is some other reason that a PO cannot be closed, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button, and then click "Take Action" to return the submission package to the Project PM.

After clicking "Take Action", a prompt will appear to allow you to provide direction to the Project Manager on what is required to close the associated POs. Click the "Return" button, after adding comments, to process the submission.



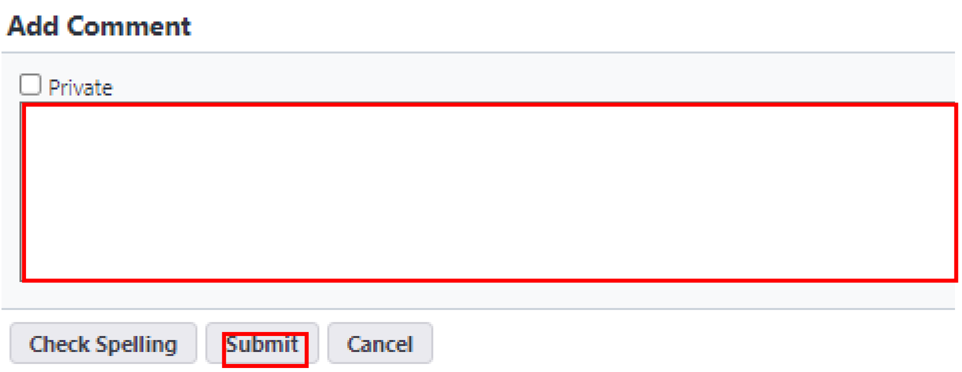
27.09 Fee Confirmation Revision (PM)

If the Business Office (BO) determined that all Project POs cannot be closed, the PM will receive an email from eBuilder as notification that additional information is required to close the POs.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

After opening the process instance, click on the "Comments" tab for direction from the BO regarding what is required to closeout all POs.

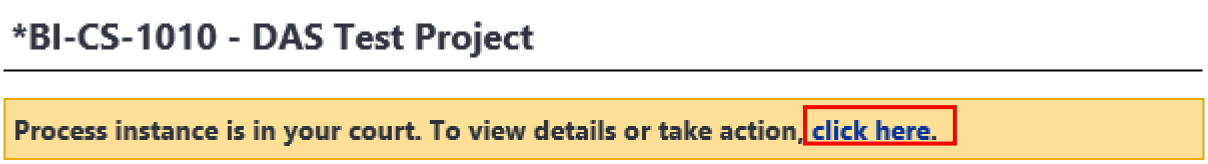
After reviewing the comments provided by the BO and, if applicable, after uploading any additional documentation required by the BO, click the "Take Action" button to return the Project Closeout Package to the BO. A prompt will appear, after you click "Take Action", to allow you to respond to the BO's comment with your own comment. Click the "Submit" button after adding your comment.

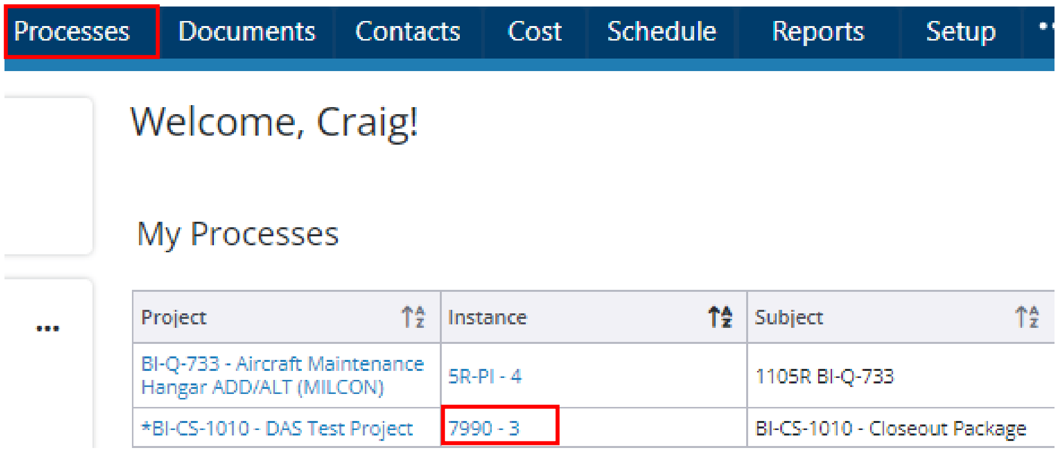


27.10 Final Reconciliation (The Accounts Examiner)

Once all of the required documents have been submitted and reviewed for project closeout, the final payment application has been processed and paid, all DAS and Vendor fees have been paid in full, and the Business Office has closed all Vendor PO's on the project, The Accounts Examiner will receive an email from eBuilder as notification that the Project is ready for financial review and internal audit.

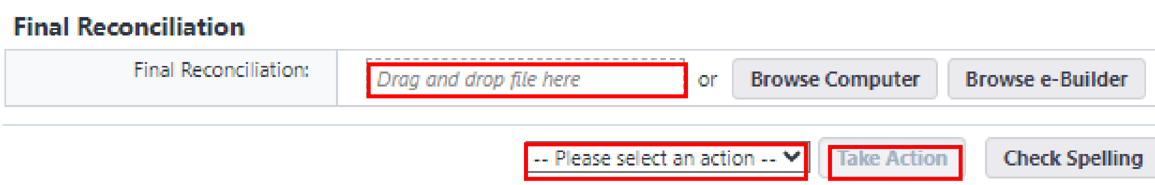
To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.



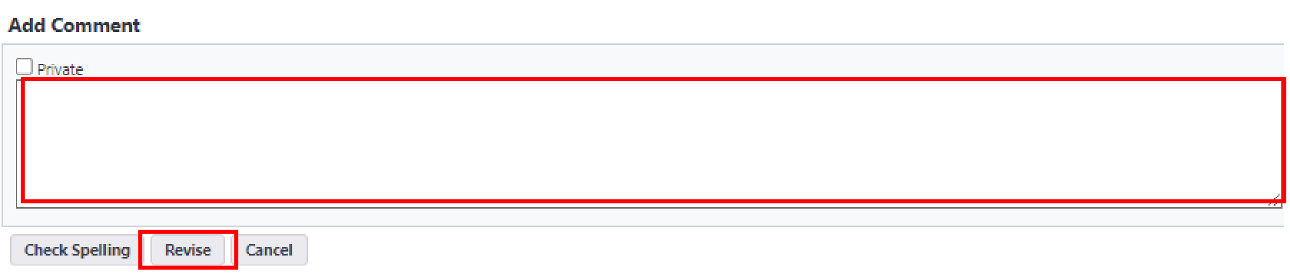


After opening the process instance, click on the "Comments" tab to review all previous correspondence regarding the subject Project Closeout Package. Once complete, begin working on the final reconciliation.

If the reconciliation cannot be finalized, scroll down to the bottom of the page and either select "Revise" from the dropdown list next to the "Take Action" button, to return the closeout submission to the PM to request additional information and/or documentation to complete the financial review, or select "BO" if you require Business Office input prior to completing the reconciliation. If the reconciliation is complete and the project can be closed in eBuilder, upload a copy of the final reconciliation to the "Final Reconciliation" field, select "Approve" from the dropdown list and click the "Take Action" button.



If "Revise" or "BO" was selected, a prompt will appear to allow you to add comments regarding the financial review and/or provide direction on the requirements to complete your review. Once you have entered your comment, click the "Revise" or "BO" button respectively to forward the submission package to the appropriate party.

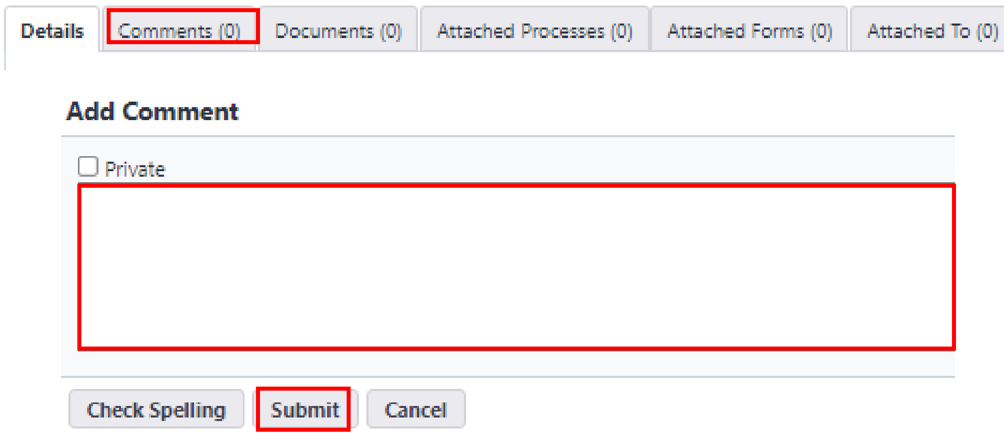


27.11 Reconciliation Review (PM)

If The Accounts Examiner is unable to complete the final reconciliation for the subject Project, the PM will receive an email from eBuilder as notification that additional information is required to complete the final reconciliation.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

After opening the process instance, click the "Comments" tab to review the requirements to complete the project reconciliation process. Once you have completed the required revisions, click the "Take Action" button. You will then be prompted to provide a comment where you can provide an explanation of the corrective actions taken to complete the project reconciliation process.



27.12 Reconciliation Review (BO)

If The Accounts Examiner is unable to complete the final reconciliation for the subject Project, the Business Office (BO) will receive an email from eBuilder as notification that The Accounts Examiner requires assistance from the BO to complete the reconciliation process.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

After opening the process instance, click the "Comments" tab to get direction from The Accounts Examiner regarding the assistance needed to complete the reconciliation process. Once you have completed your review, and are ready to respond, scroll down to the bottom of the page and click the "Take Action" button. You will then be prompted to provide a comment where you can respond to The Accounts Examiner.