2019

Professional Services Application (Release 2) – User Guide

VERSION 1.0

JASON LANDES (KYTC)

PSR2 – User Acceptance Testing (UAT)

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1 Request User Authorization (Internal KYTC / External KYTC)

Overview: This document is to serve as a User Guide for the Professional Services - Release 2 (PRS2) application.

Please note that this document will continually be updated throughout the BETA testing period of this application.

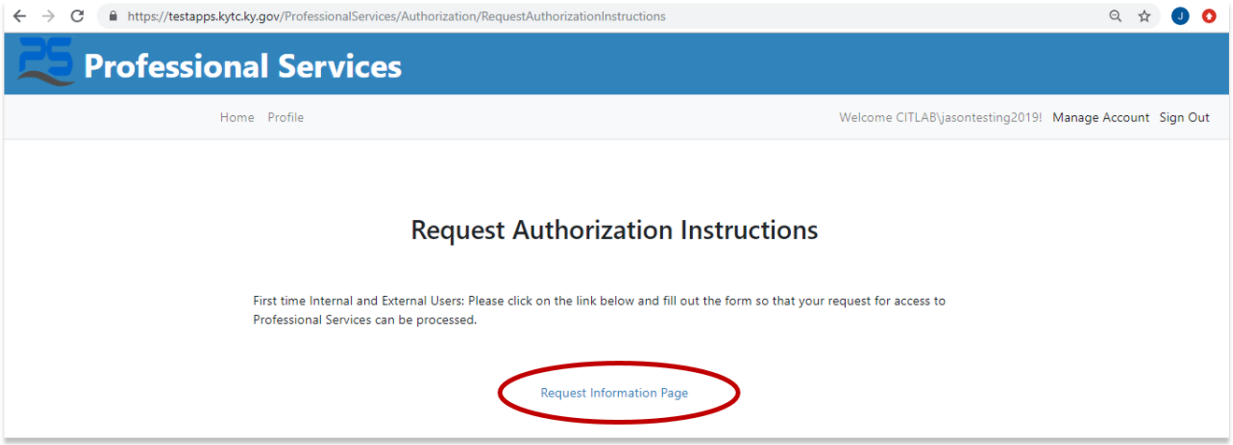
- All authenticated users must undergo a one-time authorization process to gain access to the PSR2 application.
- Internal KYTC user will request access to the PSR2 application using single sign-on with their Active Directory (AD) credentials.
- External users will first need to create a Kentucky Online Gateway (KOG) account. The external user will use their KOG credentials (email address and password) to request authorization to the Professional Services application.
- **Kentucky Online Gateway URL:** https://kog.chfs.ky.gov/home
- Application Approval / Denial of PSR2 access is handled through a "Manage User" Exceptions List role.

1.1 Request User Authorization to PSR2 (Internal KYTC)

Internal KYTC users (on the KYTC network) must request user authorization to access the PSR2 application, in order to perform day-to-day operations assigned to them. The Internal KYTC PSR2 application URL is: https://apps.intranet.kytc.ky.gov/professionalservices

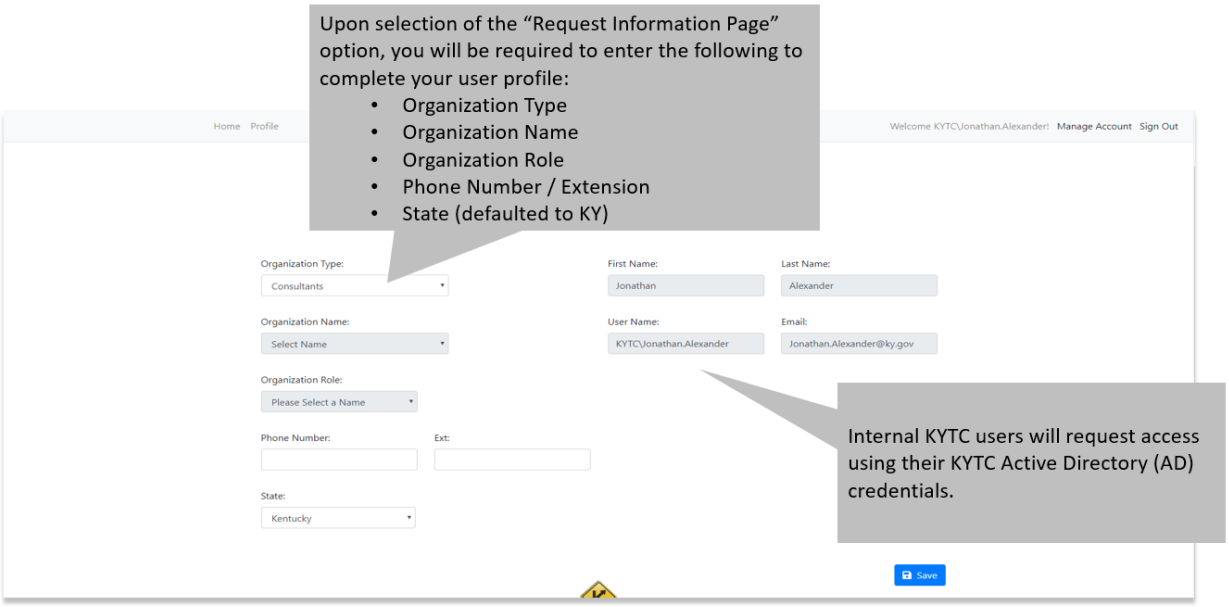
Access User Permission to PSR2 (Internal KYTC):

- An internal KYTC user shall request access to PSR2 using their Active Directory (AD) account.
    - Selection of the following link will prompt users to enter in their KYTC Active Directory (AD) credentials: https://apps.intranet.kytc.ky.gov/professionalservices

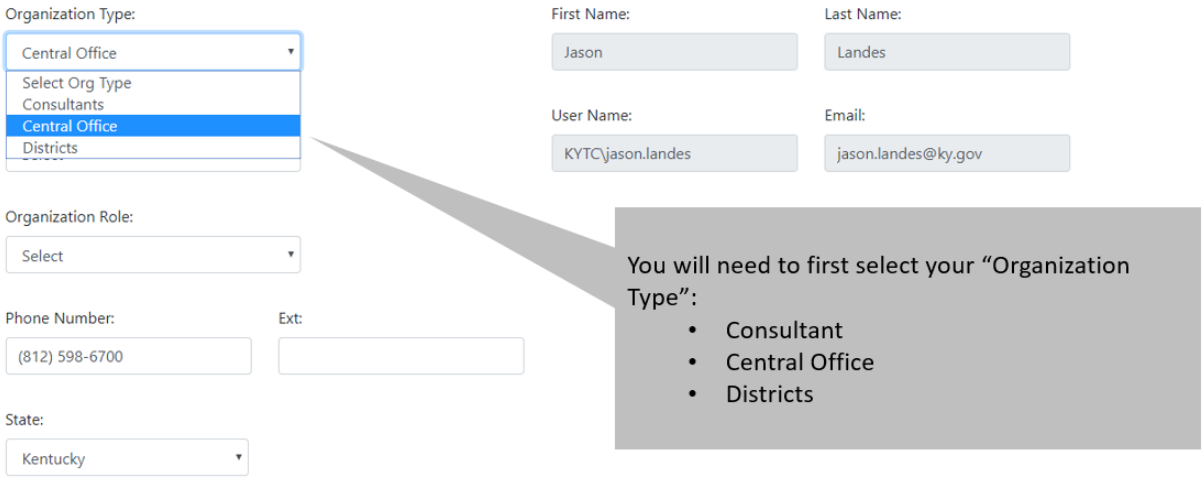


- Upon selection of the "Request Information Page", the user shall be required to select their:
    - Organization Type

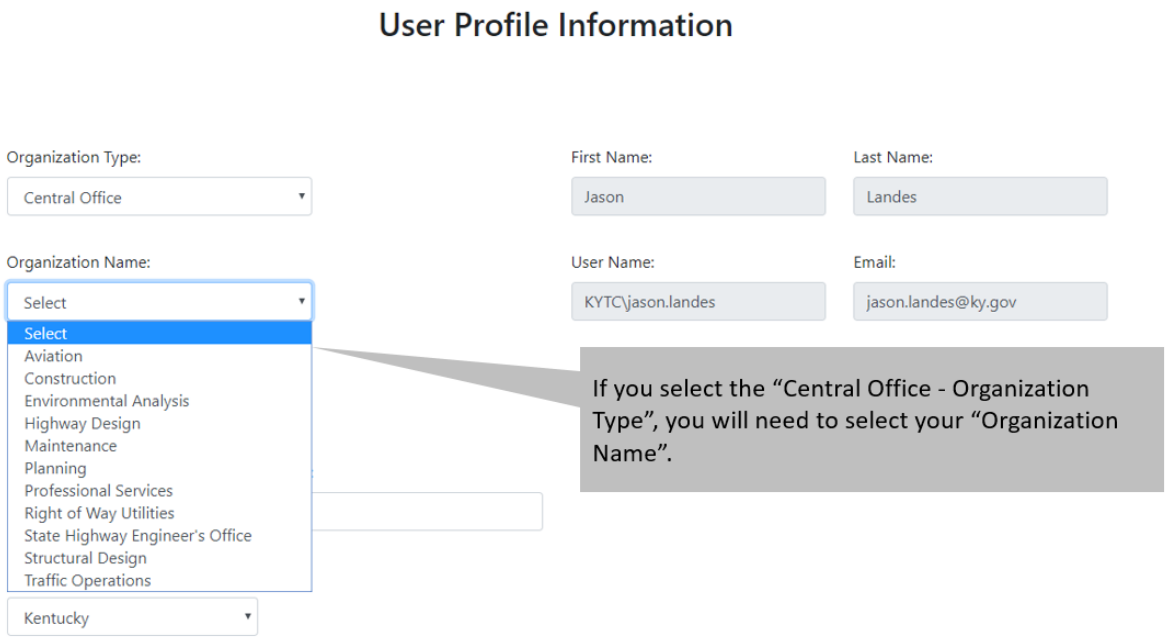
- Organization Name
- Organization Role
- Phone Number



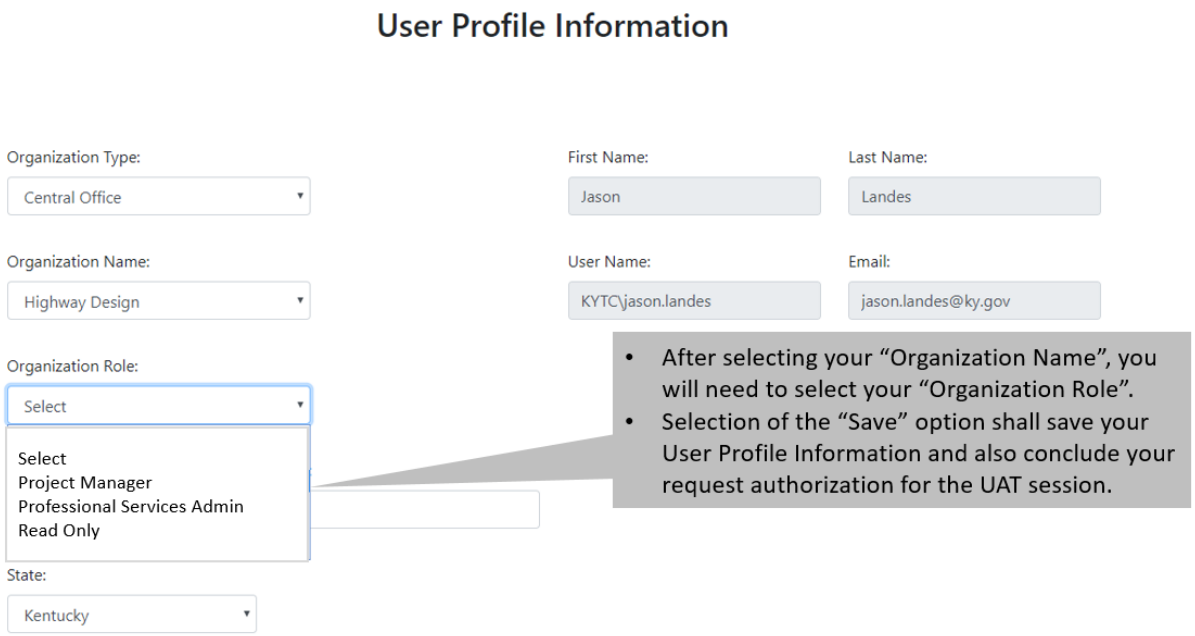
User Profile Information



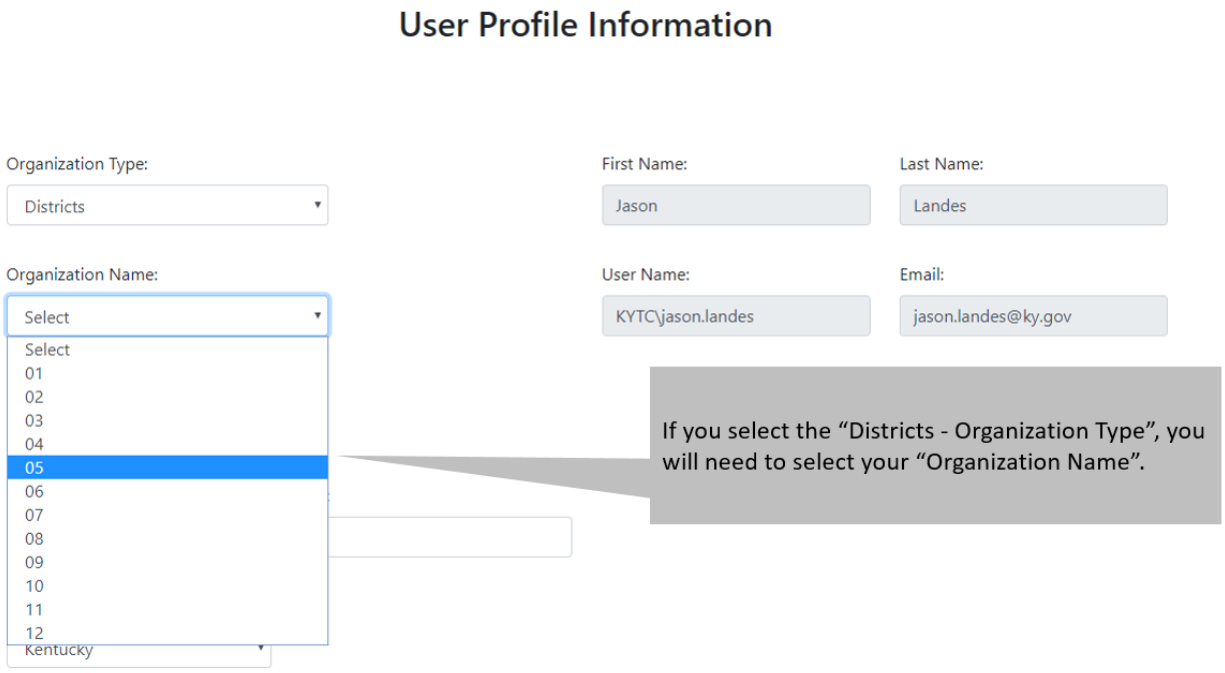
- Selection of the "Central Office" Organization Type will display applicable "Organization Name" options.



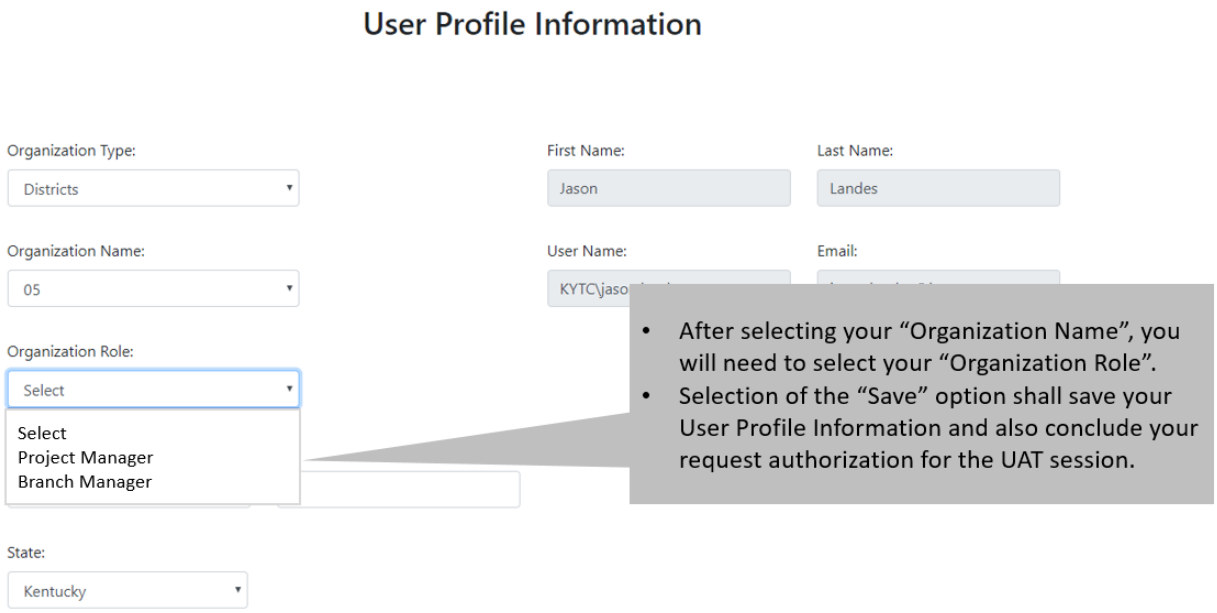
- After selecting the "Organization Name", the user will select their "Organization Role":
  - Project Manager
  - Professional Services Admin
  - Read Only

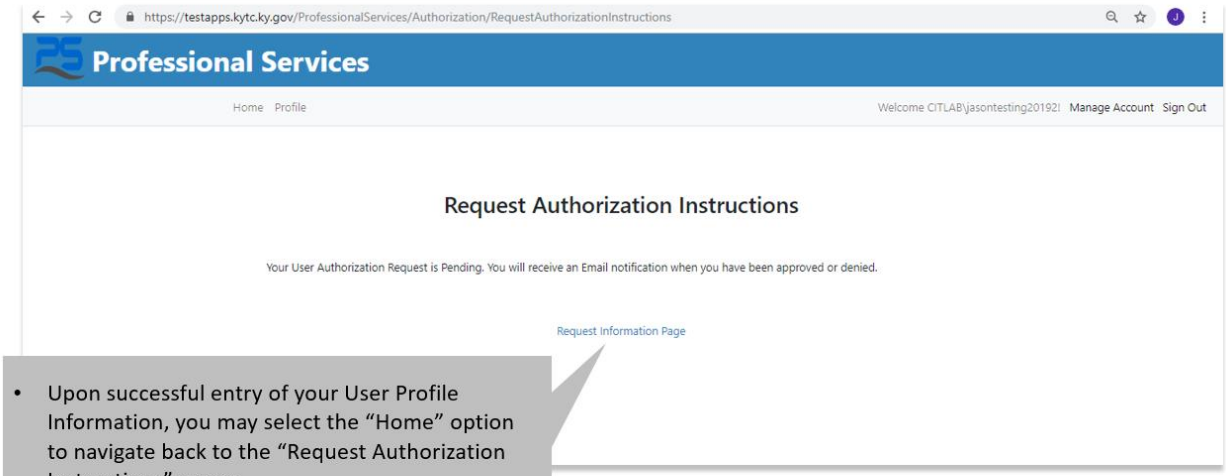


- Selection of the "Districts" Organization Type shall display the applicable "Organization Name" options.



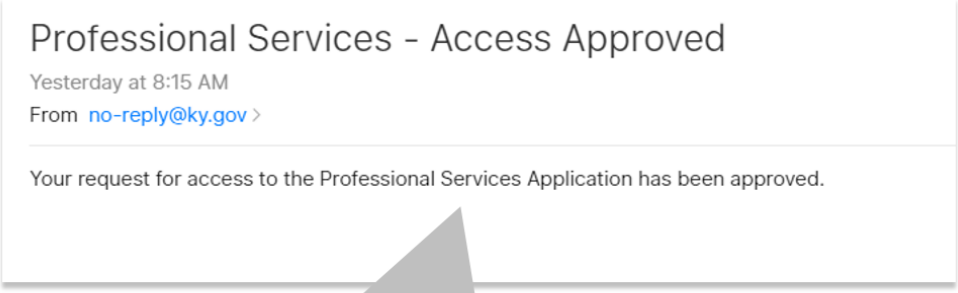
- After selecting the "Organization Name", the user will select their "Organization Role":
  - Project Manager
  - Branch Manager





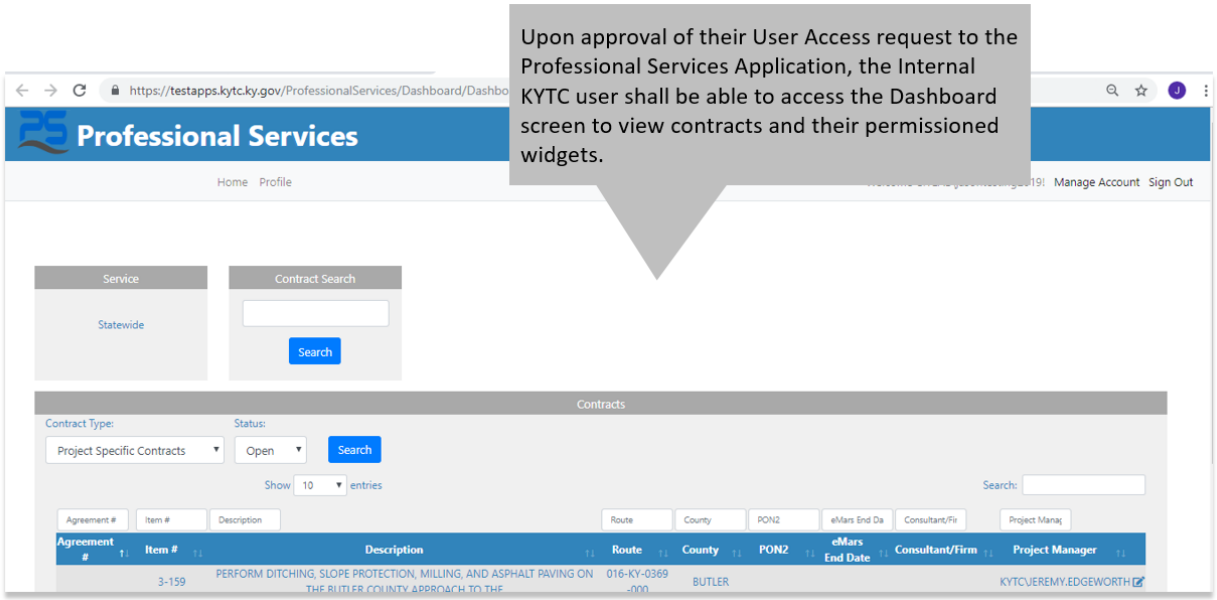
- Upon successful entry of your User Profile Information, you may select the "Home" option to navigate back to the "Request Authorization Instructions" screen.
- You shall see a message indicating that your Authorization request is pending.

- An internal KYTC requestor shall receive an email notification of their authorization request status (Approved / Denied).
    - A Professional Services Admin with Manage Users Exception List permissions will be responsible for approval / denial of Internal KYTC user authorization requests.



Upon approval of their access request to the Professional Services Application, the internal KYTC user shall receive an email confirmation.

- An internal KYTC user than has been granted access to the PSR2 app shall be able to log into the application: https://apps.intranet.kytc.ky.gov/professionalservices



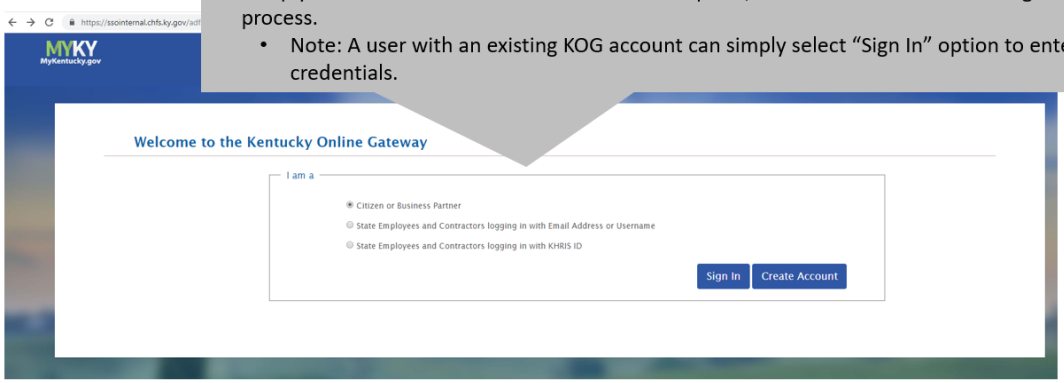
1.2 Request User Authorization to PSR2 (External KYTC)

External KYTC users must request user authorization to access the PSR2 application, in order to perform day-to-day operations assigned to them. **Each external user needing to access the PSR2 application will need to follow the below steps.** The external (non-KYTC user) PSR2 application URL is: https://apps.transportation.ky.gov/professionalservices

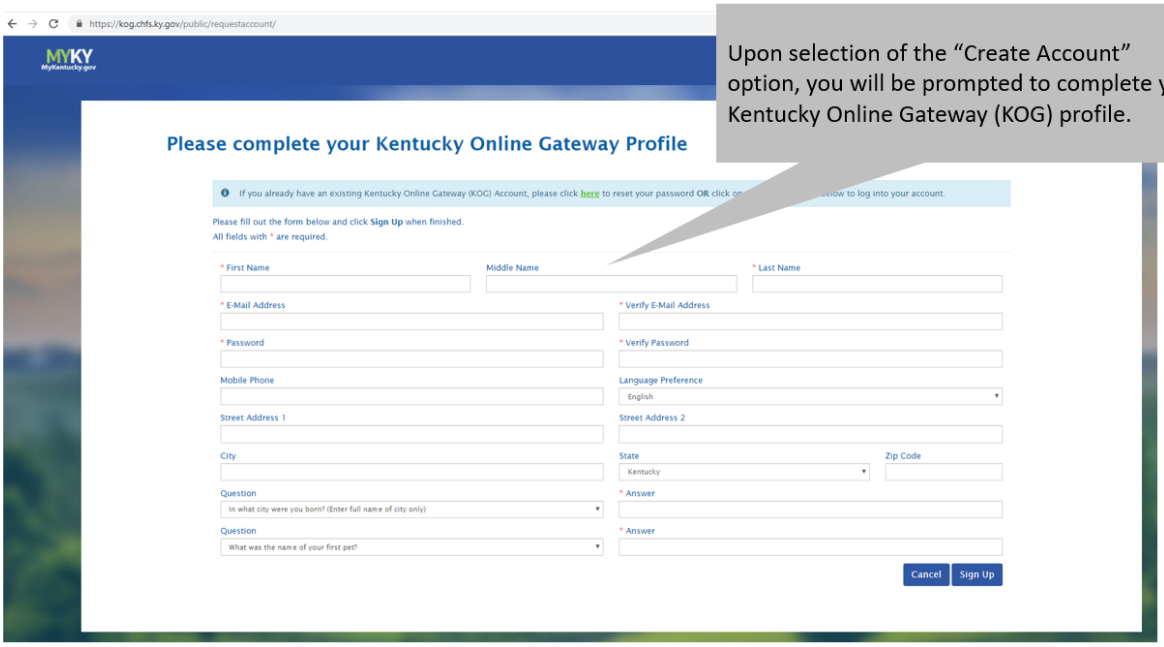
Access User Permission to PSR2 (External KYTC):

- Prior to accessing the PSR2 application (https://apps.transportation.ky.gov/professionalservices), external (non-KYTC) users will be required to have a Kentucky Online Gateway (KOG) profile.
- An external KYTC user can access the PSR2 application through the Kentucky Online Gateway (KOG) (https://kog.chfs.ky.gov/home).
- An external KYTC user, without a KOG profile will NOT be able to access the PSR2 application.

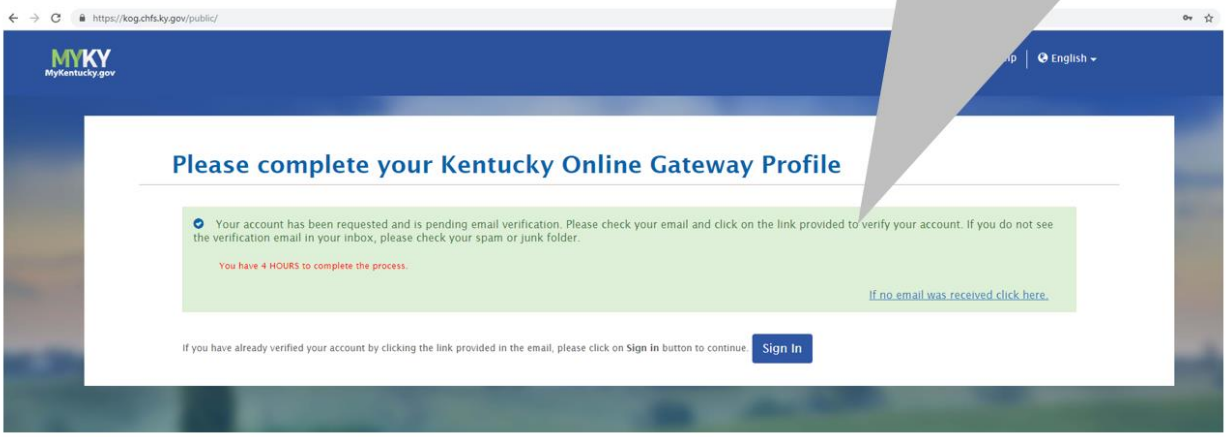
- All first time users of the Professional Services application will be required to request access.
- You will be navigated to the Kentucky Online Gateway (KOG) site: https://kog.chfs.ky.gov/home/
- As an External (non-KYTC) user, you will need to sign-up for a KOG profile to access the Professional Services application.
- Simply select the "Citizen or Business Partner" option, then "Create Account" to begin the sign-up process.
  - Note: A user with an existing KOG account can simply select "Sign In" option to enter their KOG credentials.



Upon selection of the "Create Account" option, you will be prompted to complete your Kentucky Online Gateway (KOG) profile.

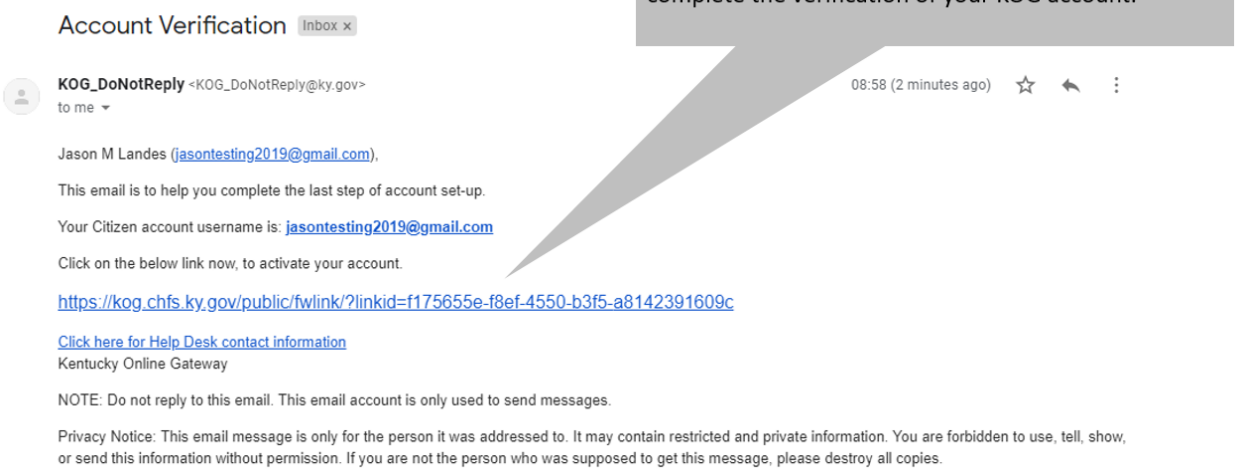


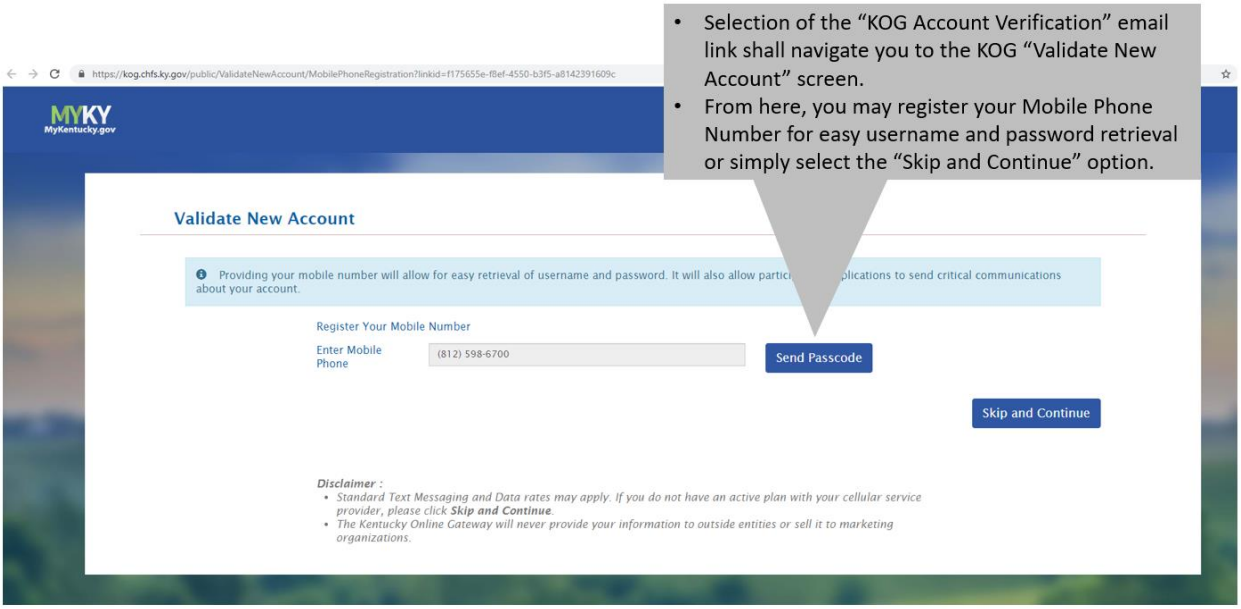
- Upon successful entry of your Kentucky Online Gateway (KOG) profile, you will see messaging indicating that your pending account requires email verification.
- You will need to access the email account that you used when filling out your KOG profile request.
  - Note: You may need to check your email account's spam or junk folders.



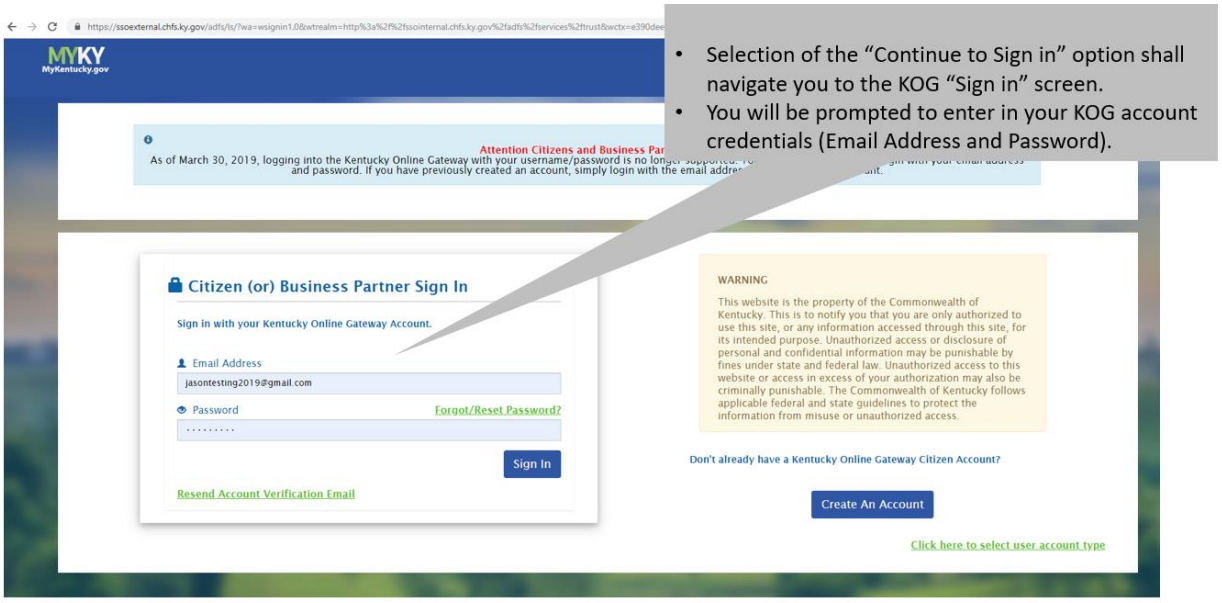
- An external KYTC requestor shall receive an email notification of their authorization request status (Approved / Denied).
  - Consultant – System Admin users, with "Manage Users" Exception List permissions will be responsible for approval / denial of their firm's authorization requests.

The body of the "KOG Account Verification" email shall contain a link that will need to be clicked on to complete the verification of your KOG account.

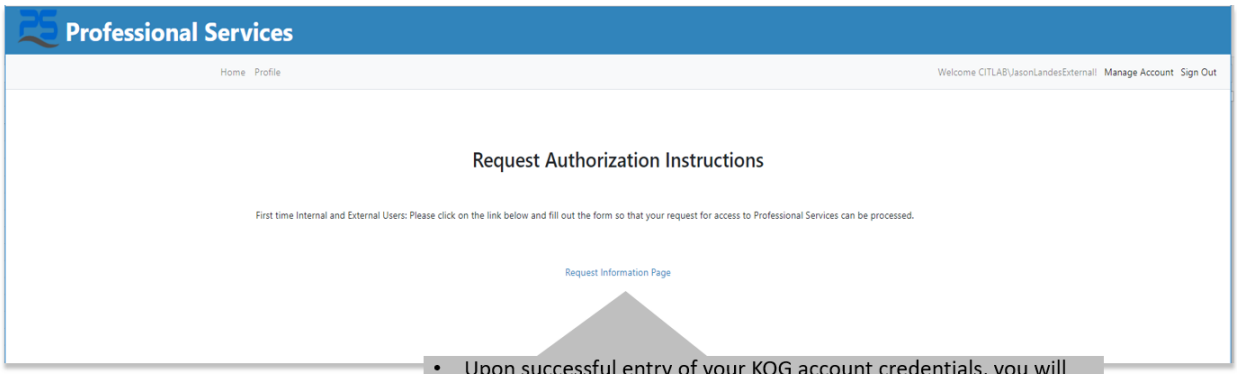




- An external KYTC user than has been granted access to the PSR2 app shall be able to log into the application using their KOG account credentials.



- Upon successful entry of the user's KOG account credentials, the will be navigated to the PSR2 application to complete their user authorization request.

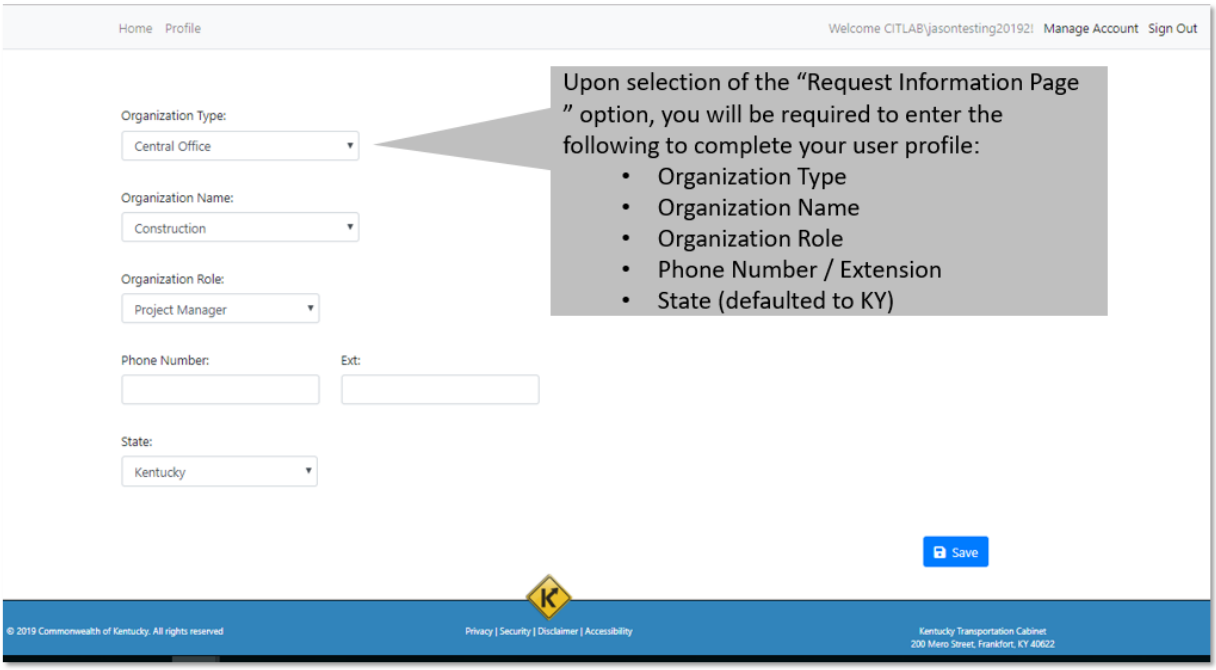


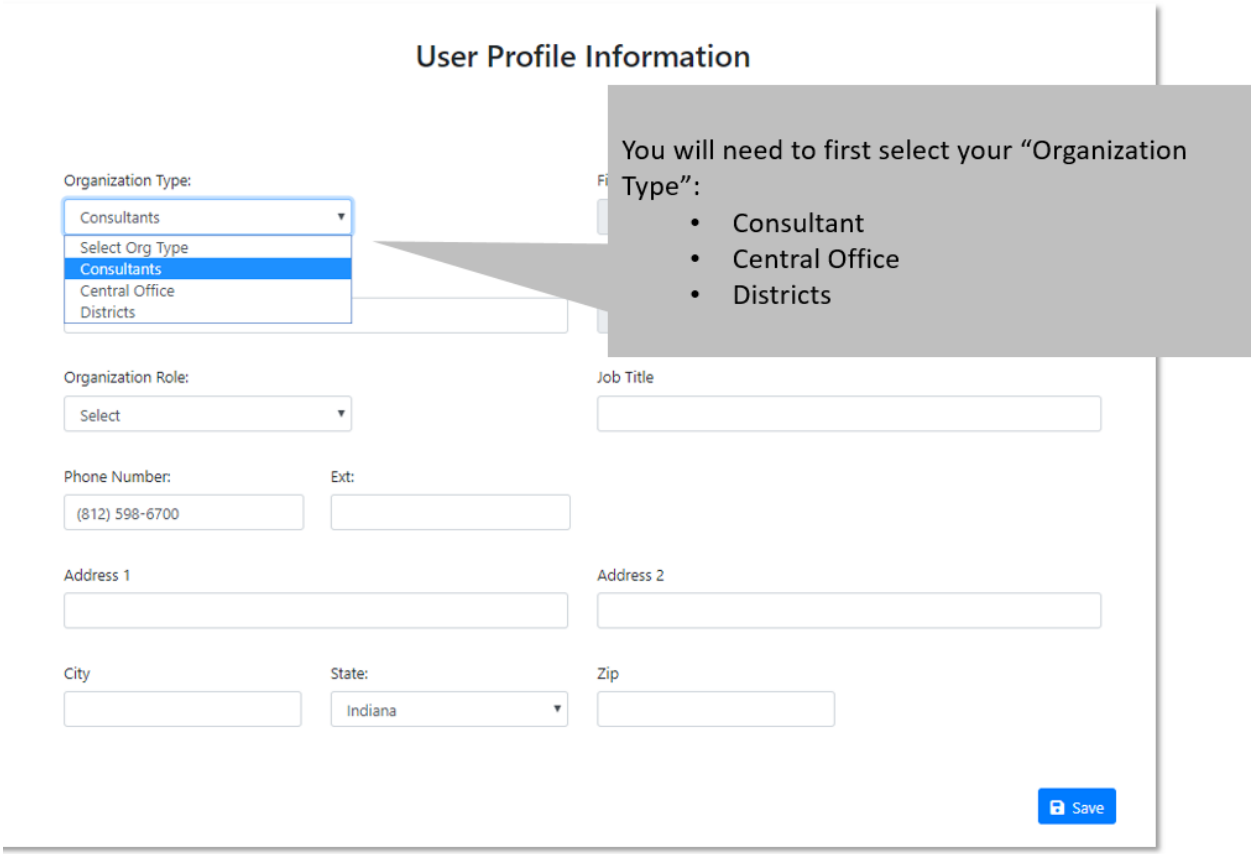
- Upon successful entry of your KOG account credentials, you will then be navigated to the Professional Services application to complete your user authorization request.
- You will now need to enter in your "User Profile Information" that will identify the type of user access you will have within the application.
- Select the "Request Information Page" option.

- Consultant firms will have three basic roles in the PSR2 application:
    - System Admin
    - Project Manager
    - Read Only
        - Note: Professional Services will initially approve one System Admin for each Consultant Firm. The System Admin role will be responsible for "Organization Role" approvals for their firm. These roles can be changed at any time by the firm's System Admin or by Professional Services.
- Upon selection of the "Request Information Page", the user shall be required to select their user role information. select their:
    - Organization Type
    - Organization Name (Name of your firm)
    - Organization Role
        - Organization Role shall dictate your permissions within the application:
            - System Admin role can:
                - View / approve user authorization requests for their firm.
                - Provide e-Signatures for contract / modification documents.
                - View contracts assigned to their firm.
                - View and enter values within Estimates assigned to their firm.
                - Request contract modifications assigned to their firm.
                - View / upload contract / mod documents assigned to their firm.
            - Project Manager
                - View contracts assigned to their firm.
                - View and enter values within Estimates assigned to their firm.
                - Request contract modifications assigned to their firm.
                - View / upload contract / mod documents assigned to their firm.
            - Read Only
                - View contracts assigned to their firm.

- View Estimates assigned to their firm.
- View contract modifications assigned to their firm.
- View contract / mod documents assigned to their firm.

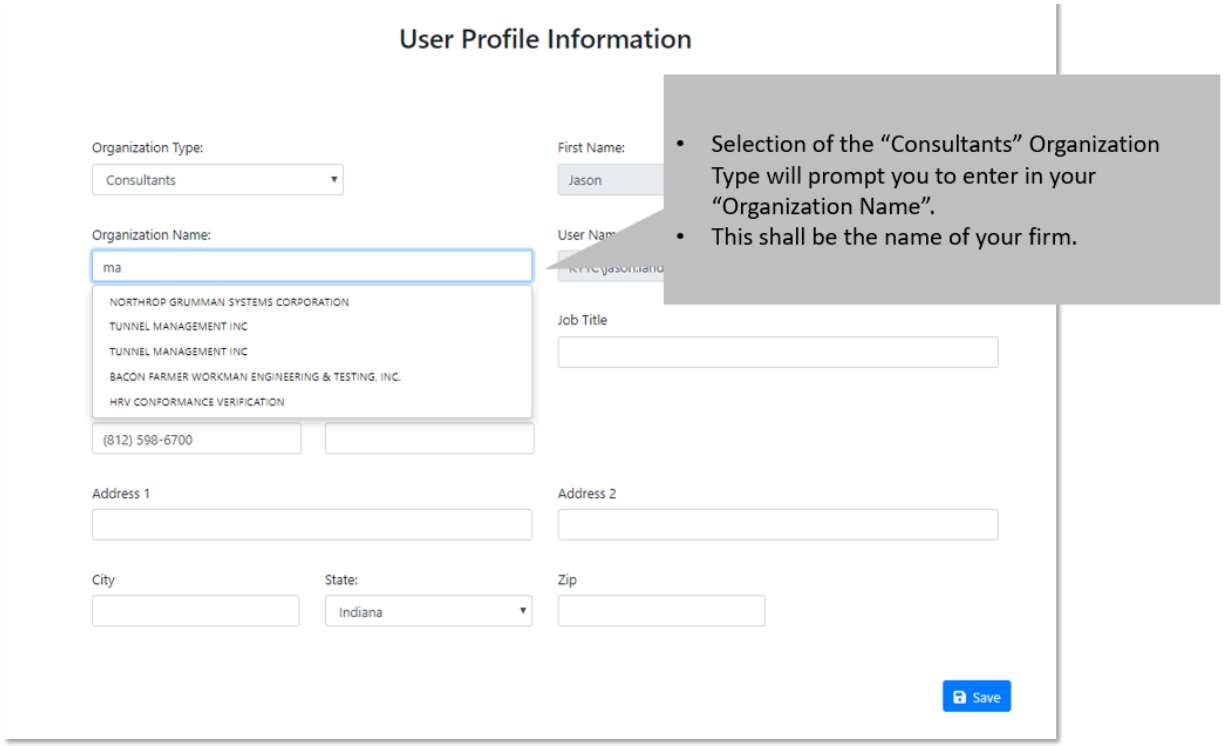
- Phone Number
- Job Title
- Address 1 / Address 2
- City / State / Zip



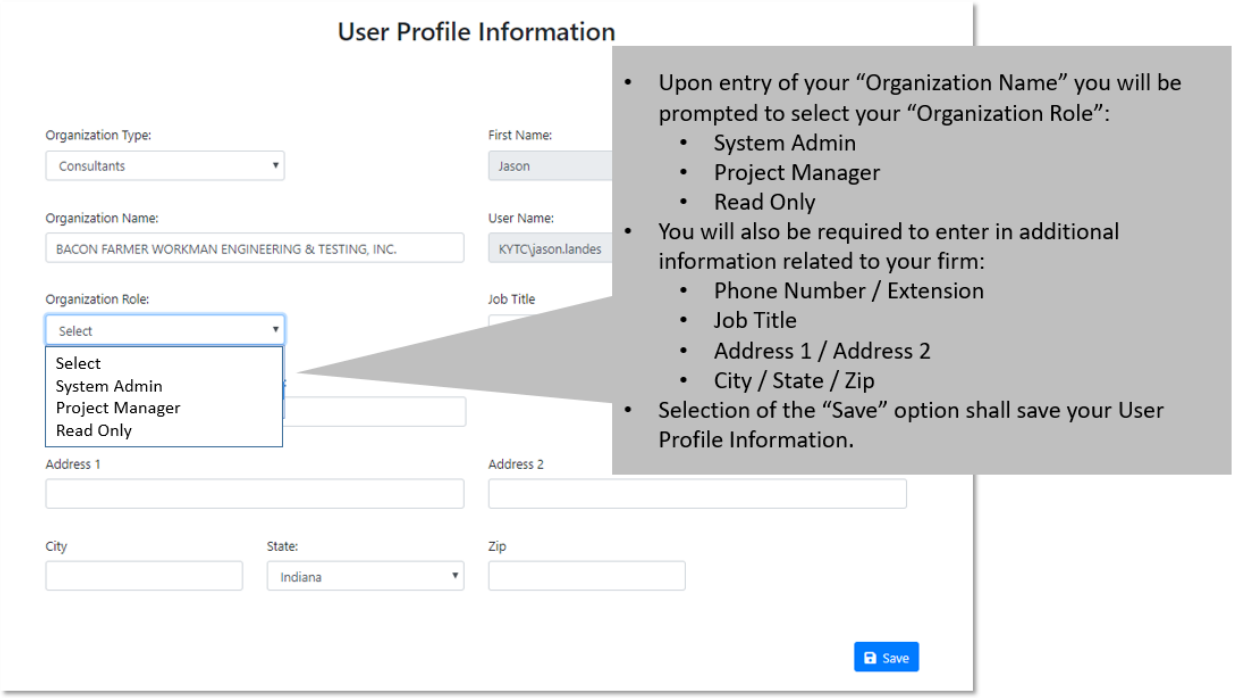


You will need to first select your "Organization Type":

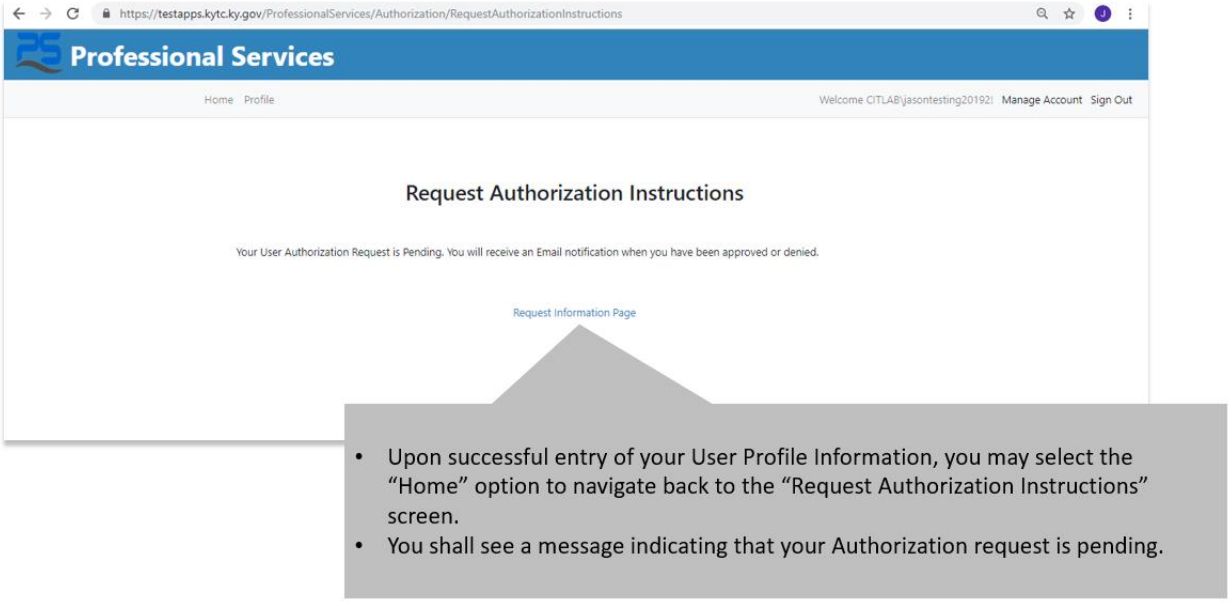
- Consultant
- Central Office
- Districts



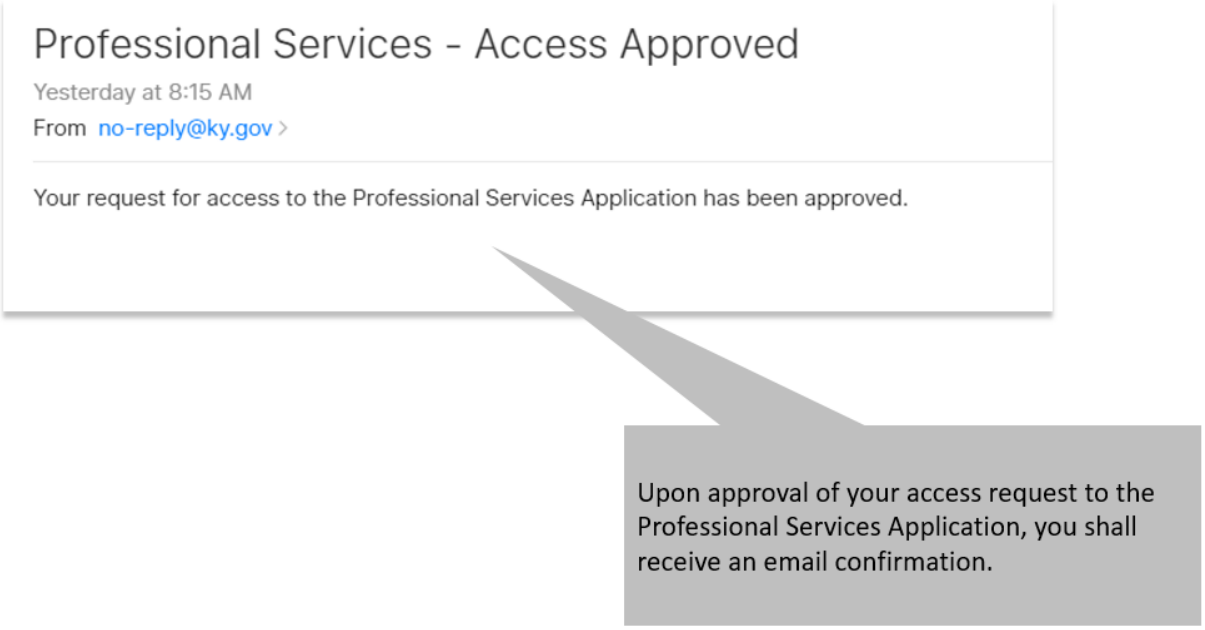
- Selection of the "Consultants" Organization Type will prompt you to enter in your "Organization Name".
- This shall be the name of your firm.



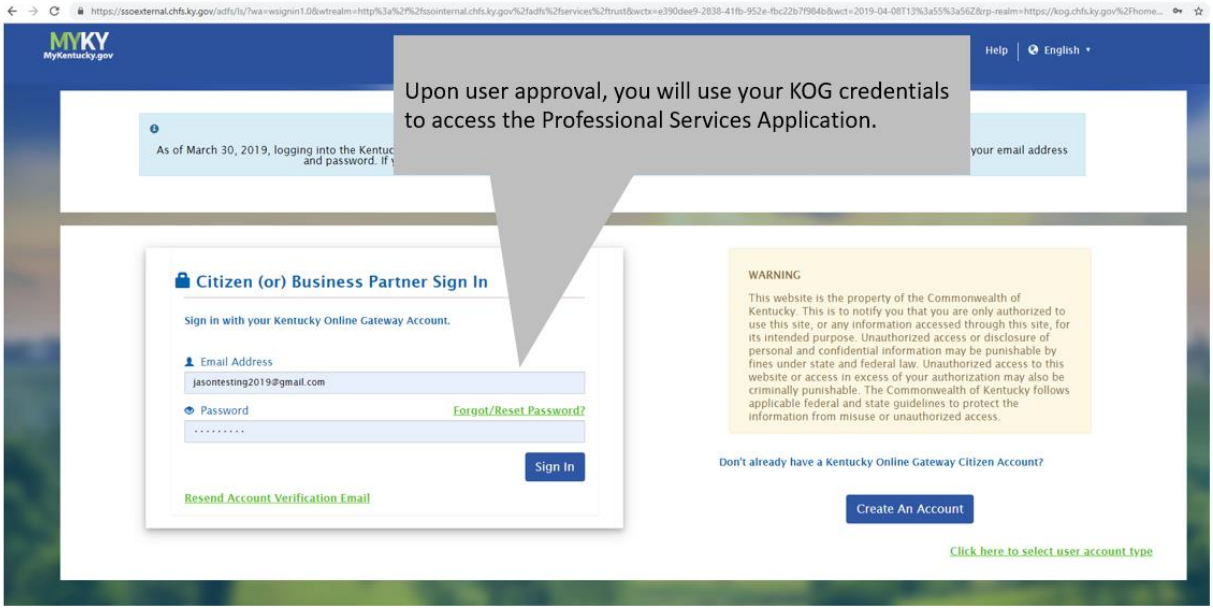
- Upon successful entry of the User Profile Information, the user will be redirected to the "Request Authorization Instructions" screen indicating that their Authorization Request is pending.

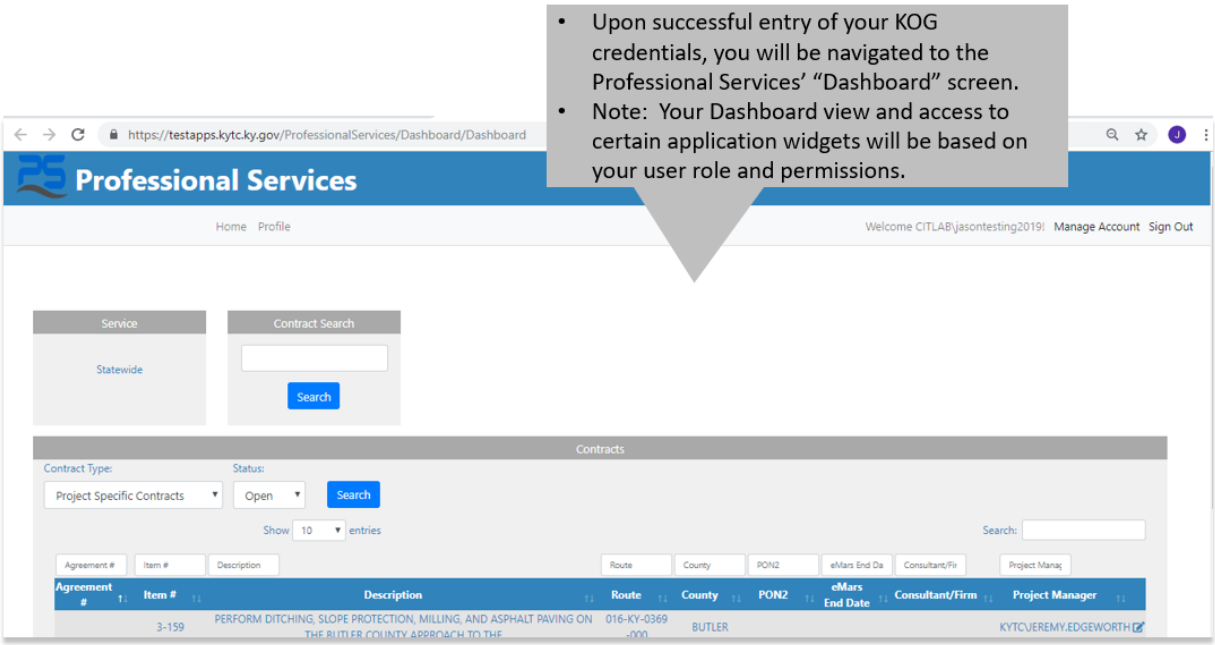


- Once the user's Authorization Request has been approved, they shall receive an email notification.
    - If denied access, the user shall also receive an email.



- Upon approval, the external user (non-KYTC) shall be able to access the PSR2 application using their KOG credentials.





2 Dashboard

The PSR2 application Dashboard displays user role based widgets. Each widget performs specific functionality to handle day-to-day processes. If a user does NOT have permissions to use a particular widget, then they shall NOT be able to access that widget. For example, a Consultant role shall NOT be able to access the Bulletin widget, etc.

Based on the individual user's PSR2 role and permissions, the Dashboard screen may display a combination of the following widgets:

- Admin – Manage Users
- Admin – Manage Exceptions
- Admin – Manage Selection Committee Pools
- Admin- Manage Type Tables
- Bulletin
- Consultant Management widget
- Contract Search
- Create Contract
- Project Specific Contracts Grid
- Statewide Services
- Statewide Contracts Grid
- User Requests

2.1 Dashboard – Create Contract (Project Specific) Widget

An authenticated user can select the "Create Contract" widget from the Dashboard screen to navigate to the Create Contract screen.

Create Contract (Project Specific) Widget

- A Professional Services Admin (PSA) and Project Manager (District) can select the "Create Contract" widget from the Dashboard screen to navigate to the Create Contract screen.

2.2 Dashboard – User Requests Widget

An authenticated user can select the "User Requests" widget from the Dashboard screen to navigate to the User Authorization screen.

User Requests Widget (Manage Users Exceptions List):

- A user with "Manage Users" Exceptions List permissions can select the "User Requests" widget from the Dashboard screen to navigate to the "User Authorization" screen.

2.3 Dashboard – Admin Widget

An authenticated user with "Manage Users" Exceptions List permissions can view the Admin Widget from the Dashboard screen.

2.3.1 Dashboard – Admin Widget – Manage Users

An authenticated user with "Manage Users" Exceptions List permissions can select the "Manage Users" option under the "Admin" widget within the Dashboard screen to navigate to the "Manage Users" screen.

Admin Widget – Manage Users (Manage Users Exceptions List):

- An authenticated user with Manage Users Exceptions List permissions can select the "Manage Users" option under the "Admin" widget within the Dashboard screen to navigate to the "Manage Users" screen.

2.3.2 Dashboard – Admin Widget – Manage Exceptions

An authenticated user with "Manage Users" Exceptions List permissions can select the "Manage Users" option under the "Admin" widget within the Dashboard screen to navigate to the "Exception List Assignment" screen.

Admin Widget – Manage Exceptions (Manage Users Exceptions List):

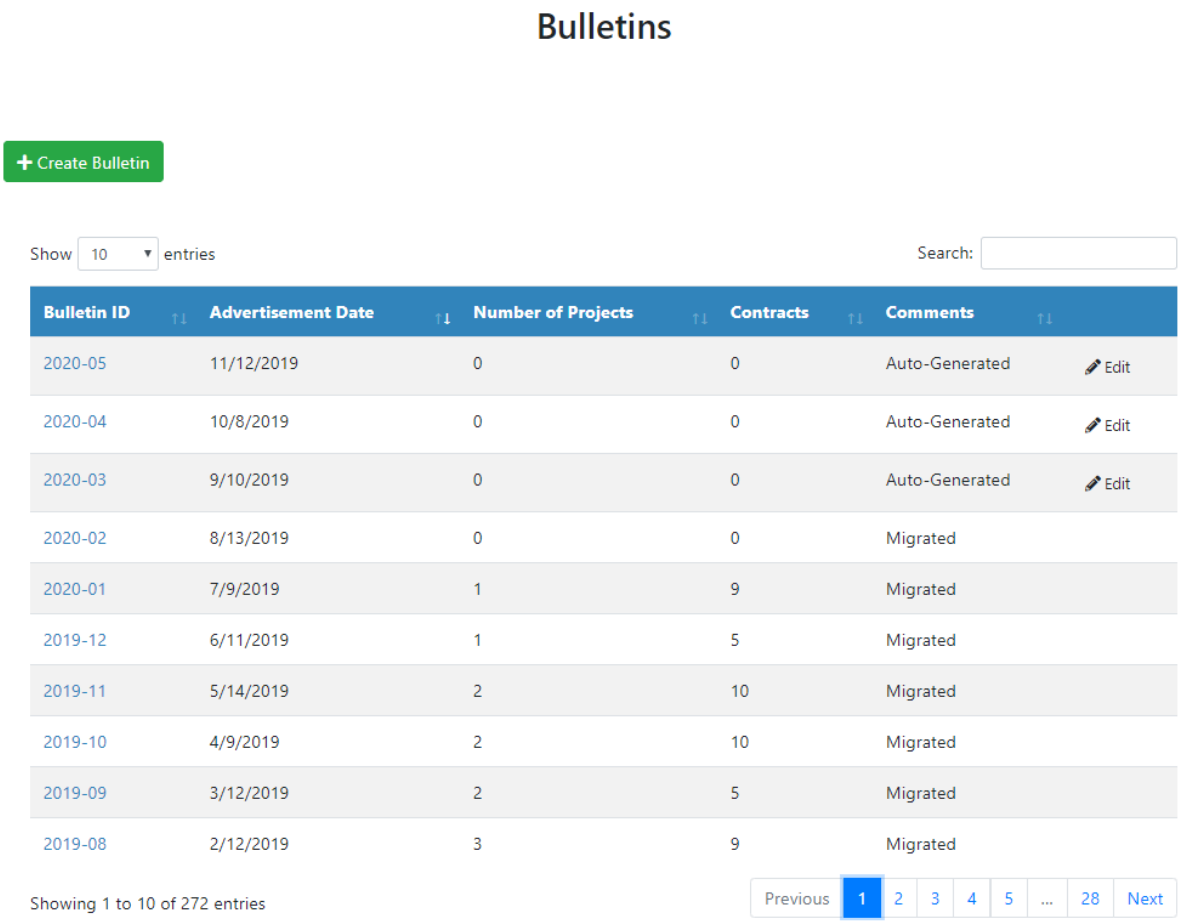
- An authenticated user with “Manage Users” Exceptions List permissions can select the “Manage Exceptions” option under the “Admin” widget within the Dashboard screen to navigate to the “Exception List Assignment” screen.

2.4 Dashboard – Bulletin Widget

An authenticated user with “Bulletins” Exceptions List permissions can select the “Bulletin” option within the Dashboard screen to navigate to the “Bulletins” screen.

Bulletin Widget (Bulletin Exceptions List):

- An authenticated user with “Bulletins” Exceptions List permissions can select the “Bulletins” widget within the Dashboard screen to navigate to the “Bulletins” screen.



2.5 Dashboard – Contract Search Widget

A Professional Services Admin (PSA), Project Manager (Central Office), Project Manager (District) can select search for contracts to select one to view or edit.

The Contract Search widget is a smart list of contracts that will display all contracts that contain the text entered in any of the following contract fields:

- Agreement Number
- Project Number
- PON2

Contract Search Widget:

- An authenticated user can search for contracts to select one to view or edit.

3 Admin Widget

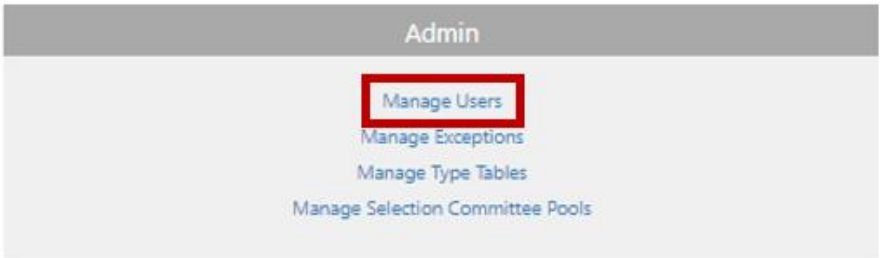
The "Admin Widget" located on the Dashboard provides authenticated users the ability:

- Manage Users
- Manage Exceptions

- Manage Type Tables
- Manage Selection Committee Pools

3.1 Admin Widget– Manage Users

The Manage Users Admin Widget allows authenticated users to edit user profiles and deactivate users. Only users assigned to the "Manage Users" Exception List shall be able to access the Manage Users option within the Admin Widget.



Manage Users Screen:

- Selection of the "Manage Users" option within the Admin Widget shall navigate the user to the "Manage Users" screen.
    - User shall see a "Manage User" grid that displays all of the PSR2 users.
    - User shall be able to sort on each column.
    - User shall be able to enter smart search criteria to locate a specific user.

Manage Users

Show 10 entries Search:

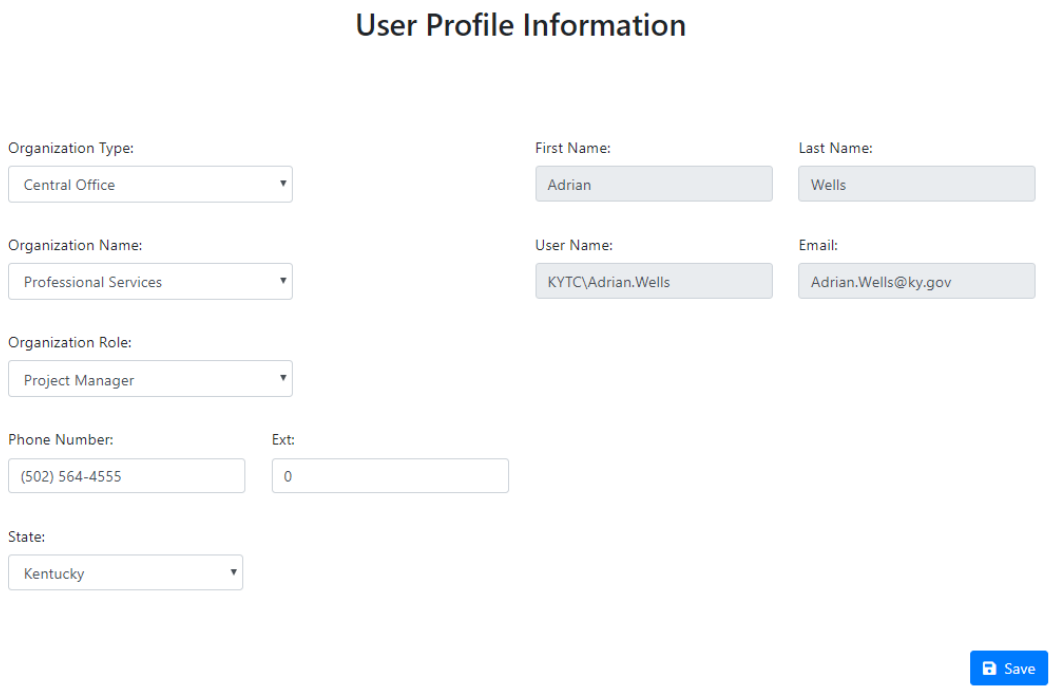
Full Name	Date Added	Org Type	Org Name	Org Role		
Adrian Wells	12/19/2018	Central Office	Professional Services	Project Manager	Edit Profile	Deactivate
Amanda Desmond	7/18/2019	Districts	05	Branch Manager	Edit Profile	Deactivate
Amanda Desmond	8/9/2019	Districts	05	Project Manager	Edit Profile	Deactivate
Amanda Spencer	7/18/2019	Central Office	Planning	Project Manager	Edit Profile	Deactivate
Andre Johannes	7/18/2019	Central Office	Highway Design	Project Manager	Edit Profile	Deactivate
Andrew Stewart	7/18/2019	Districts	03	Branch Manager	Edit Profile	Deactivate
Andy Barber	7/18/2019	Central Office	State Highway Engineer's Office	Project Manager	Edit Profile	Deactivate
Aric Skaggs	7/18/2019	Districts	10	Branch Manager	Edit Profile	Deactivate
Bart Asher	7/18/2019	Central Office	Structural Design	Project Manager	Edit Profile	Deactivate
Beth Niemann	7/18/2019	Central Office	Planning	Project Manager	Edit Profile	Deactivate

Showing 1 to 10 of 202 entries

Previous 1 2 3 4 5 ... 21 Next

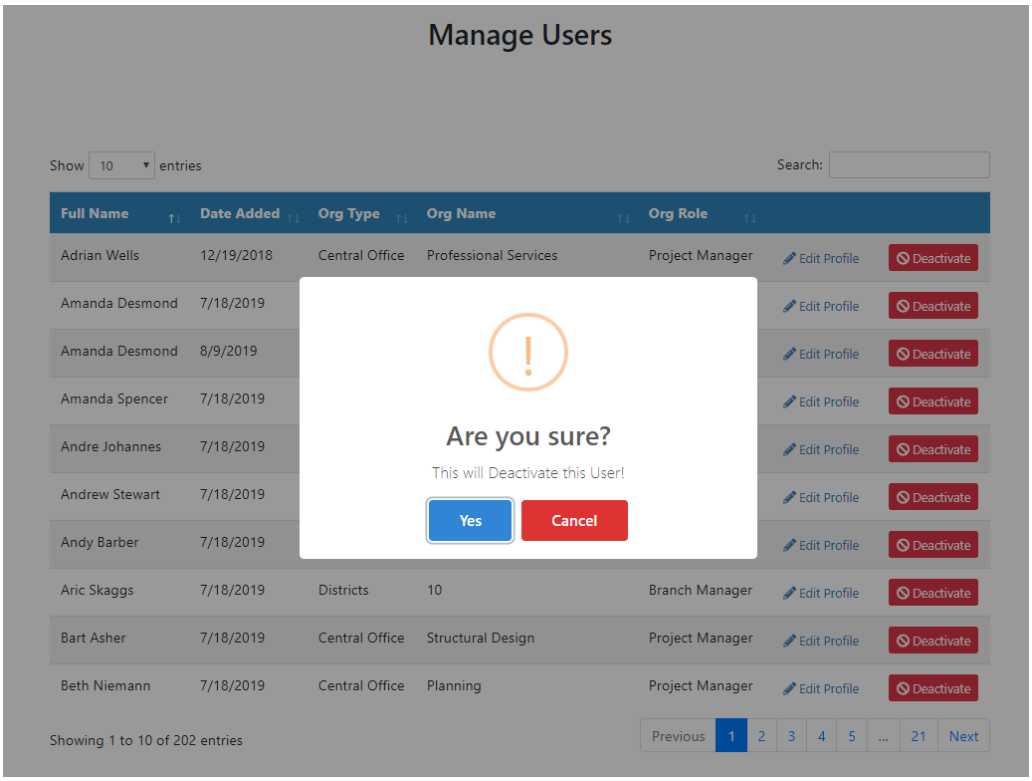
Manage Users Screen – Edit Profile

- Selection of "Edit Profile" option shall navigate user to the "User Profile Information" screen to make updates to the selected user profile record.
- User selection of "Save" option shall save updates to PSR2 application.



Manage Users Screen - Deactivate Users:

- User selection of "Deactivate" option shall display a dialog box – "Are you sure? – This will deactivate this user!"
    - User selection of "Yes" option shall deactivate user from PSR2 application.
        - Deactivated users will be removed from all exception lists.
    - User selection of "Cancel" shall NOT deactivate user.



3.2 Admin Widget – Manage Exceptions

An Exception List provides users with special authorities or permissions for specific tasks within the PSR2 application. A user with "Manage Exceptions" Exceptions List permissions can add or remove other users to one or many Exceptions Lists.

Only users assigned to the "Manage Users" Exception List shall be able to access the "Manage Exceptions" option within the Admin Widget.

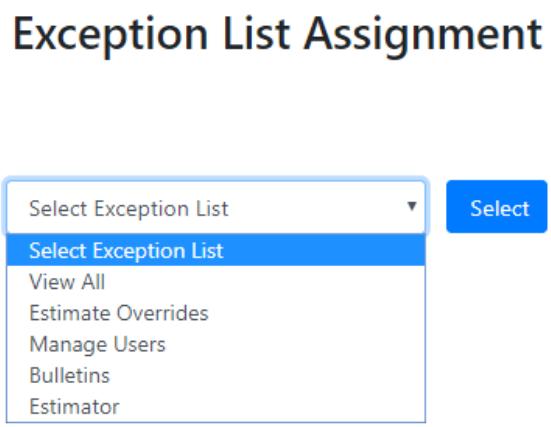
PSR2 Exception List areas include:

- Estimate Overrides
- Manage Users
- Bulletins
- Estimator

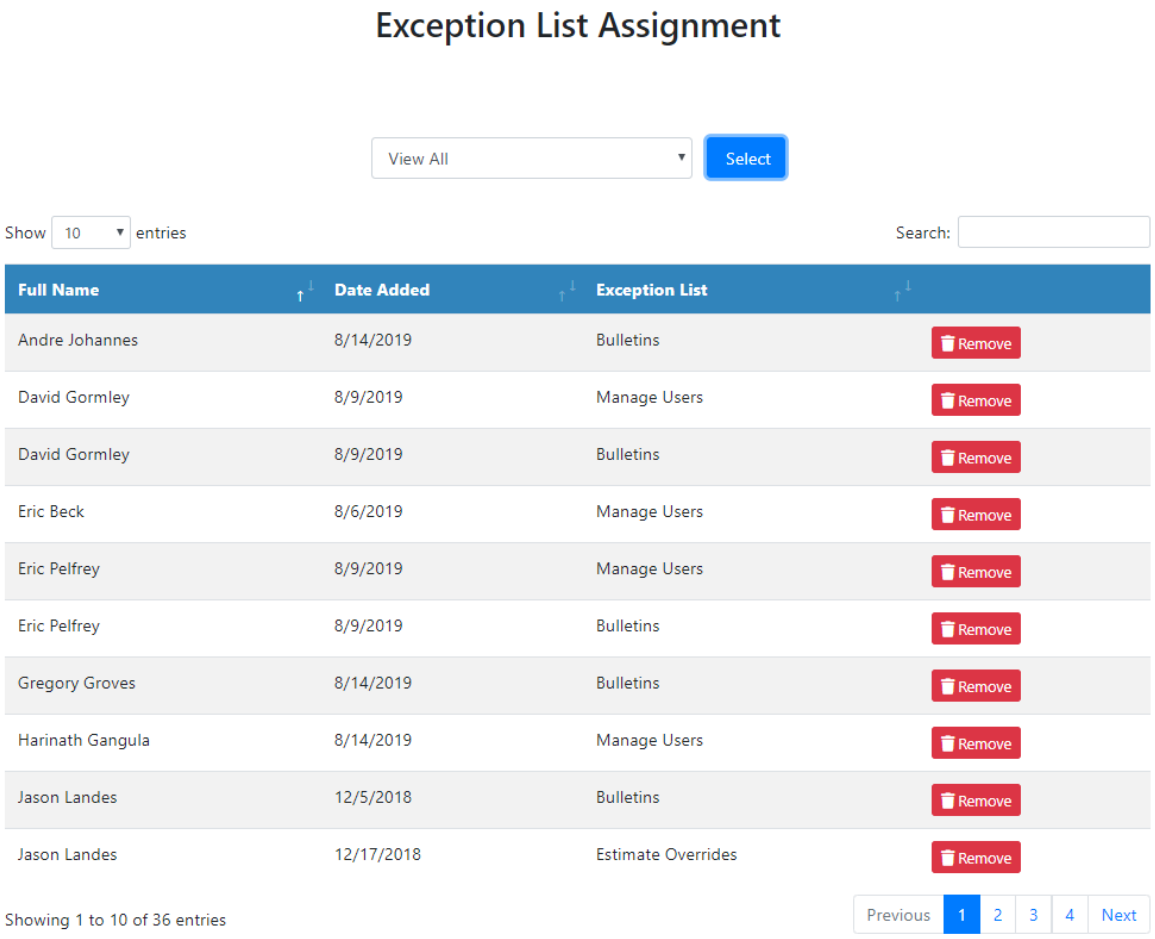
<u>Exception List Assignment Screen:</u>

- Selection of the "Manage Exceptions" option within the Admin widget shall navigate the user to the "Exception List Assignment" screen.

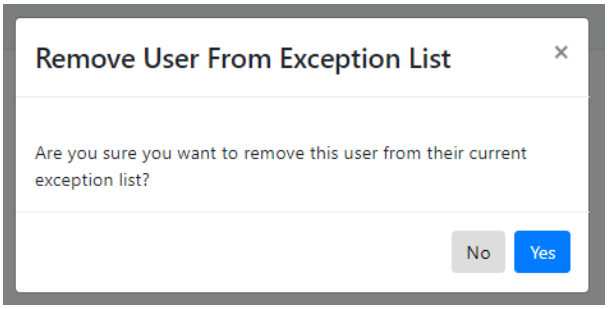
- Selection of the "Select Exception List" option within the "Exception List Assignment" screen shall display a list of available Exception List categories:
    - View All (Displays all Exception List Assignment categories)
    - Estimate Overrides
    - Manage Users
    - Bulletins
    - Estimator



- Selection of the "View All" option shall display all assigned Exception List users in all categories.
    - User shall be able to sort on each column.
    - User shall be able to enter smart search criteria to locate a specific user.



- Selection of the “Remove” option within the grid shall display the “Remove User From Exception List” pop-up window.
    - Selection of the “Yes” option shall remove the user from that Exception List.
    - Selection of the “No” option shall NOT remove the user from that Exception List.



3.2.1 Exception List – Estimate Overrides

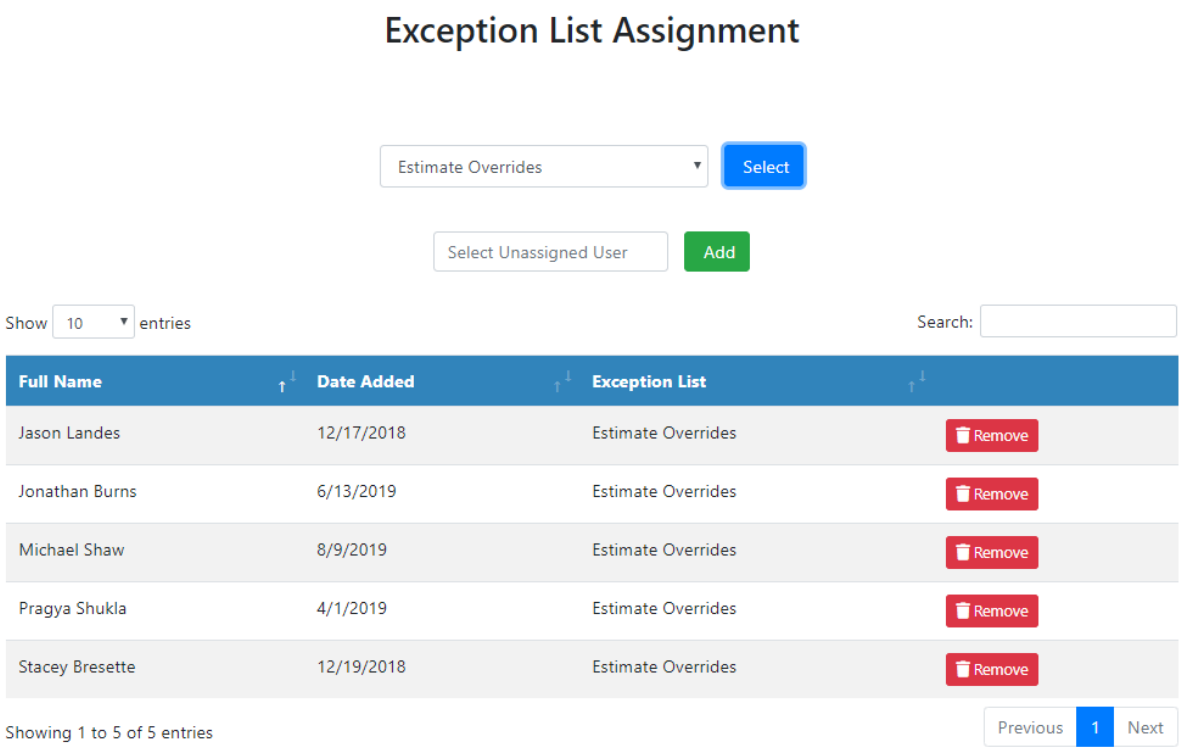
A user with "Estimate Overrides" Exceptions List permissions can update Agreed Units Estimate values after approval as part of the "Agreed Units Approval" Estimates step.

Agreed Units values include:

- Item
- Crew
- Unit Type
- Amount

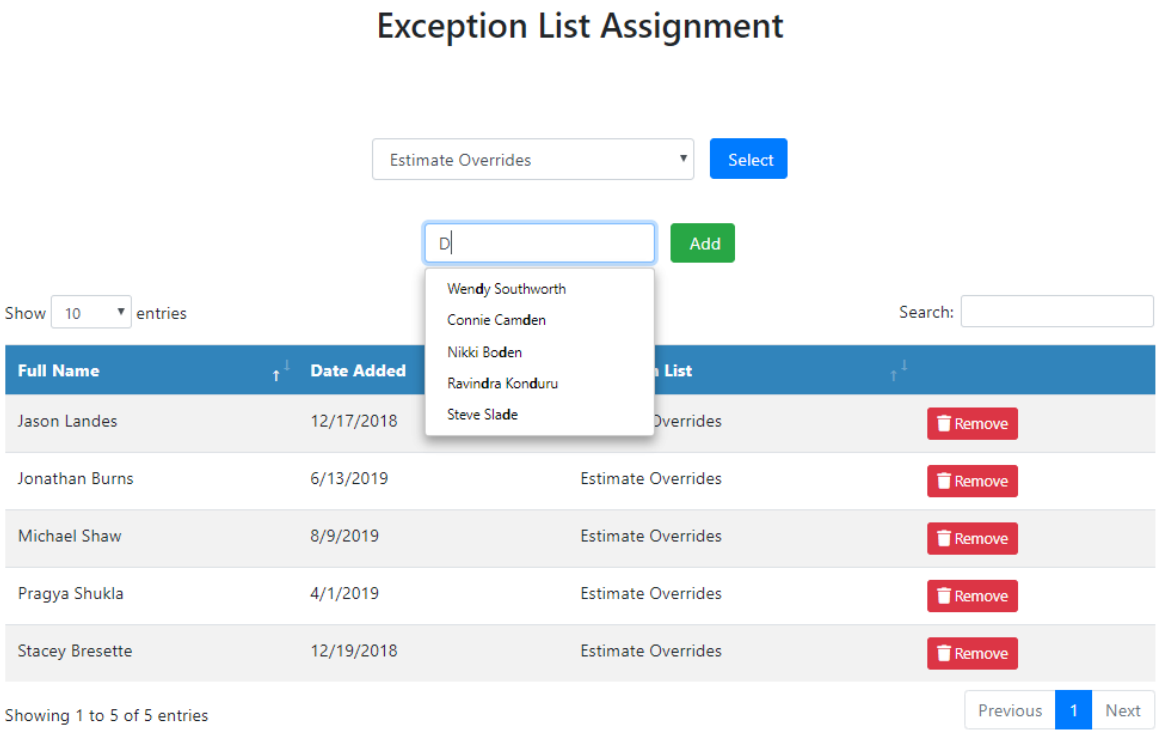
Select "Estimate Overrides" Exception List Category:

- Selection of the "Estimate Overrides" option shall display all assigned users in that category.
  - User shall be able to sort on each column.
  - User shall be able to enter smart search criteria to locate a specific user.



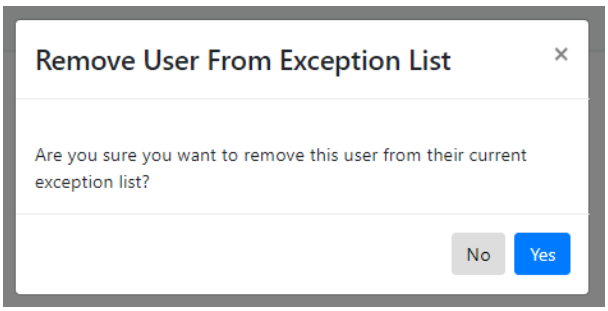
Assign User to "Estimate Overrides" Exception List:

- A user can be added to the "Estimate Overrides" Exception List by typing in a desired user in the "Select Unassigned User" field.
  - User must be an authenticated PSR2 user to display in the search criteria.
  - Upon selection of the "Add" option, the desired user's profile shall be displayed within the "Estimate Overrides" grid.



Remove User from "Override Estimates" Exception List):

- Selection of the "Remove" option within the grid shall display the "Remove User From Exception List" pop-up window.
  - Selection of the "Yes" option shall remove the user from that Exception List.
  - Selection of the "No" option shall NOT remove the user from that Exception List.

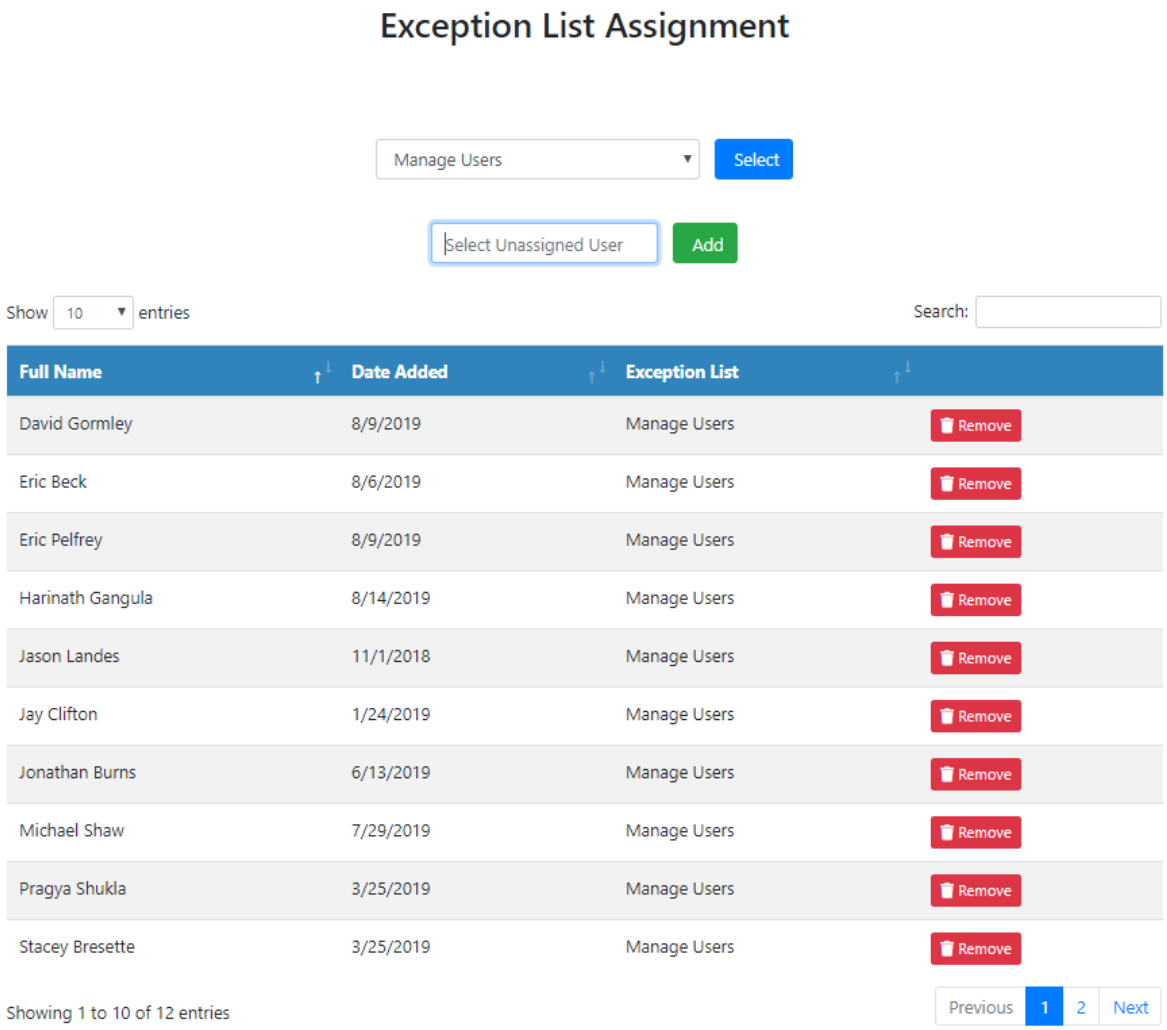


3.2.2 Exception List – Manage Users

The "Manage Users" Exception List category allows authenticated users to edit user profiles and deactivate users.

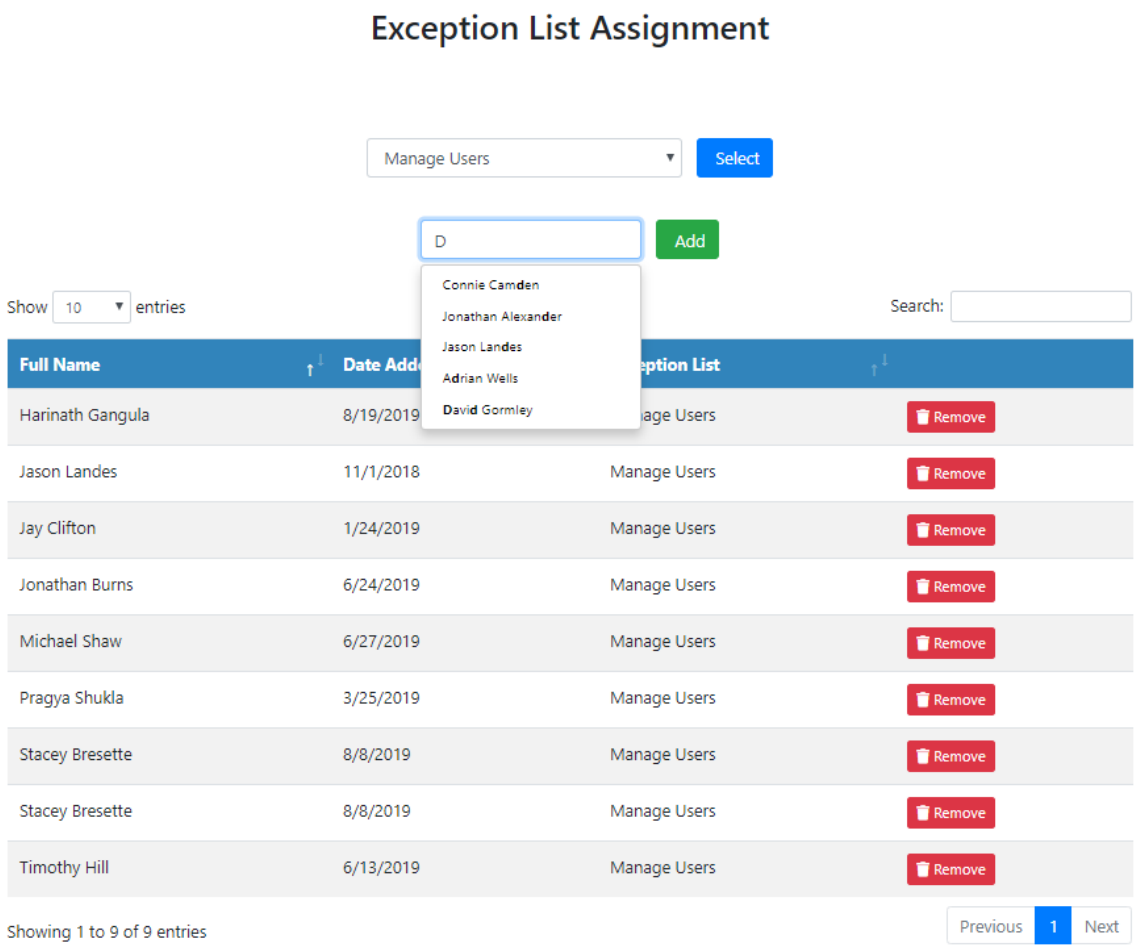
Select "Manage Users" Exception List Category:

- Selection of the "Manage Users" option shall display all assigned users in that category.
  - User shall be able to sort on each column.
  - User shall be able to enter smart search criteria to locate a specific user.



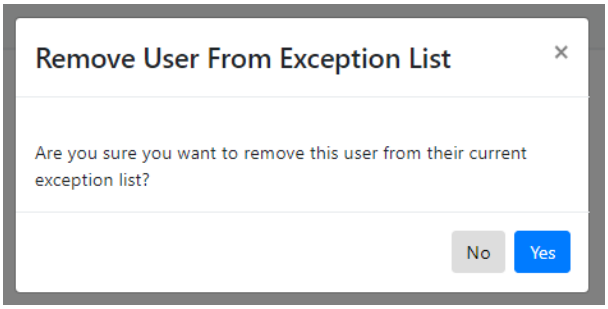
Assign User to "Manage Users" Exception List:

- A user can be added to the "Manage Users" Exception List by typing in a desired user in the "Select Unassigned User" field.
  - User must be an authenticated PSR2 user to display in the search criteria.
  - Upon selection of the "Add" option, the desired user's profile shall be displayed within the "Manage Users" grid.



Remove User from "Manage Users" Exception List:

- Selection of the "Remove" option within the grid shall display the "Remove User From Exception List" pop-up window.
    - Selection of the "Yes" option shall remove the user from that Exception List.
    - Selection of the "No" option shall NOT remove the user from that Exception List.

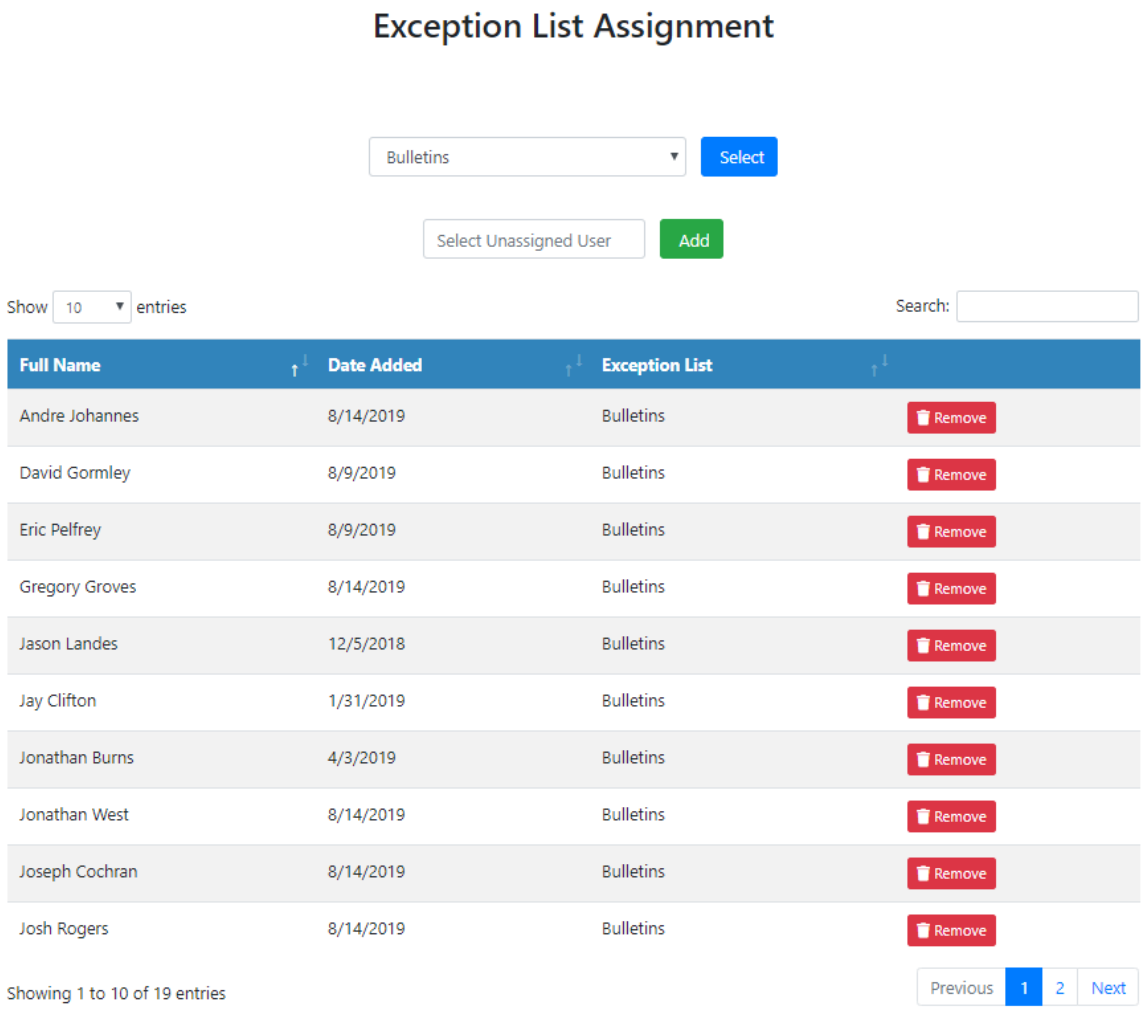


3.2.3 Exception List – Bulletins

A "Bulletin" Exception List user shall be able to access the "Bulletins" widget from the Dashboard. Selection of the "Bulletins" widget shall navigate users to the "Bulletins" screen, where Bulletins are created and edited.

Select "Bulletins" Exception List Category:

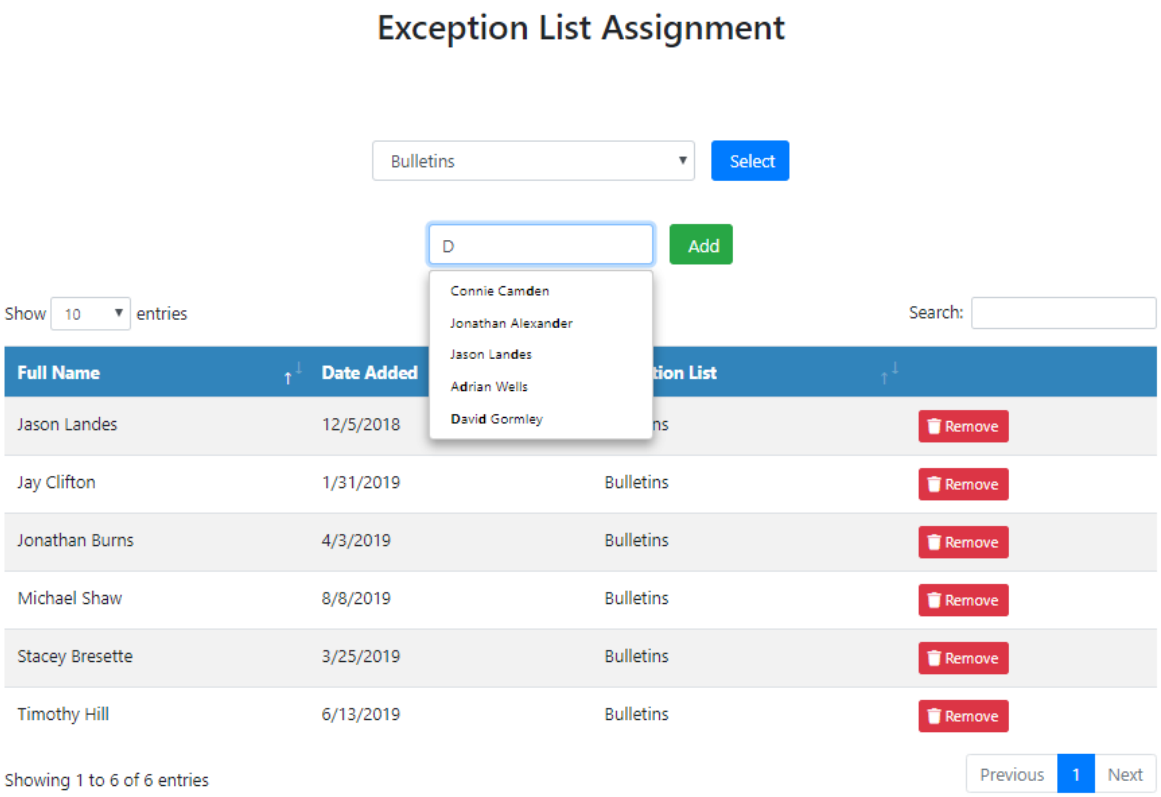
- Selection of the "Bulletins" option shall display all assigned users in that category.
  - User shall be able to sort on each column.
  - User shall be able to enter smart search criteria to locate a specific user.



Assign User to "Bulletins" Exception List:

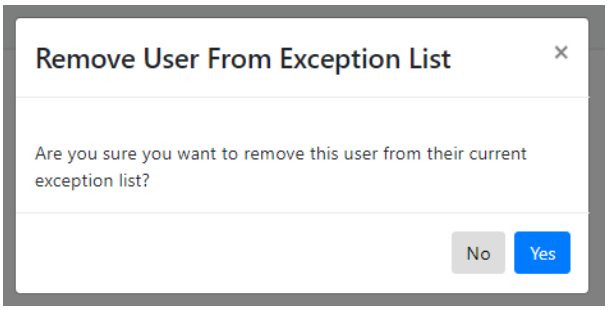
- A user can be added to the "Bulletins" Exception List by typing in a desired user in the "Select Unassigned User" field.
  - User must be an authenticated PSR2 user to display in the search criteria.

- Upon selection of the "Add" option, the desired user's profile shall be displayed within the "Bulletins" grid.



Remove User from "Bulletins" Exception List:

- Selection of the "Remove" option within the grid shall display the "Remove User From Exception List" pop-up window.
  - Selection of the "Yes" option shall remove the user from that Exception List.
  - Selection of the "No" option shall NOT remove the user from that Exception List.



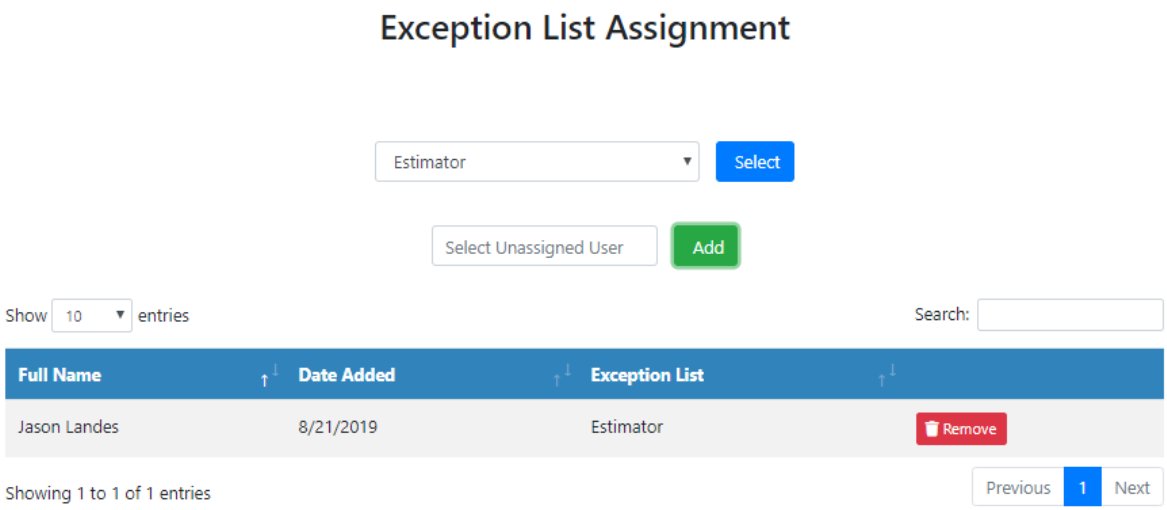
3.2.4 Exception List – Estimator

An "Estimator" Exception List user shall be able to access Estimate worksheets and negotiate Estimates with consultants on behalf of the Professional Services Admin. The Estimator will have full PSA permissions on the Estimate screen only.

In most instances, the "Estimator" user will be a "Read Only" role in the application and only interact with a contract's Estimate process.

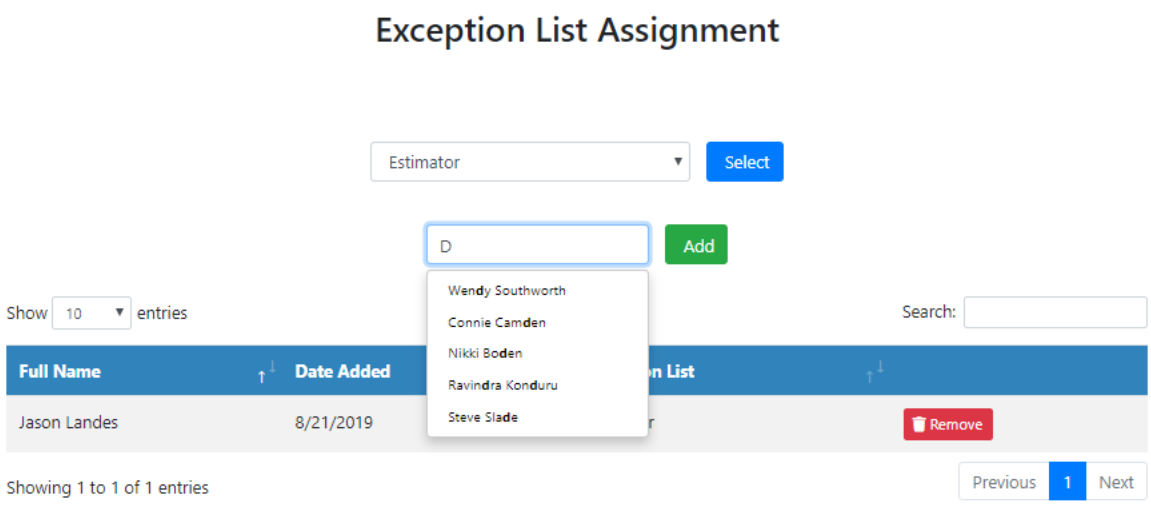
Select "Estimator" Exception List Category:

- Selection of the "Estimator" option shall display all assigned users in that category.
  - User shall be able to sort on each column.
  - User shall be able to enter smart search criteria to locate a specific user.



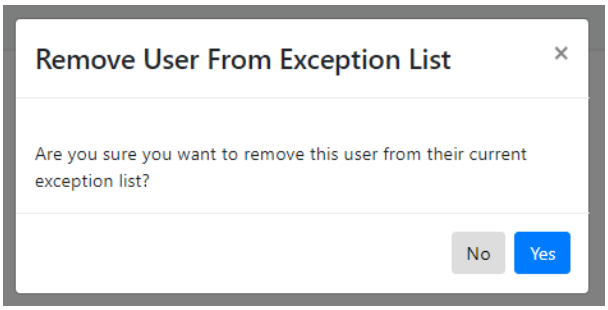
Assign User to "Estimator" Exception List:

- A user can be added to the "Estimator" Exception List by typing in a desired user in the "Select Unassigned User" field.
  - User must be an authenticated PSR2 user to display in the search criteria.
  - Upon selection of the "Add" option, the desired user's profile shall be displayed within the "Estimator" grid.



Remove User from "Bulletins" Exception List:

- Selection of the "Remove" option within the grid shall display the "Remove User From Exception List" pop-up window.
    - Selection of the "Yes" option shall remove the user from that Exception List.
    - Selection of the "No" option shall NOT remove the user from that Exception List.



4 User Requests Widget

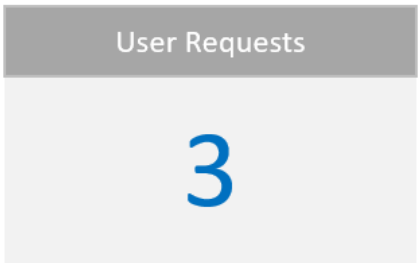
An Internal KYTC user with "Manage Users" Exceptions List permissions shall be able to see the "User Requests" Dashboard widget. The "User Request" widget within the Dashboard shall display the number of pending User Authorization Requests. Within the "User Requests" widget, the user can approve or deny user access to the PSR2 application.

In addition, a user with a Consultant – System Administrator role shall be able to see the "User Requests" Dashboard widget. This role shall see all Consultant – Ready Only, Consultant – Project Manager and Consultant – System Administrator user authorization requests within their own Consulting firm.

Select "User Requests" Widget:

- Selection of the "User Request" widget shall navigate the user to the "User Authorization" screen that displays pending authorization requests within a grid.
    - User shall be able to sort on each column.
    - User shall be able to enter smart search criteria to locate a specific user.

User Requests Widget:



View User Authorization Request:

- Selection of "Edit" option within the User Authorization grid shall navigate the user to the "User Profile Information" to review / edit the user's profile.

Approve User Authorization Request:

- Selection of the "Approve" option shall grant user authorization to the PSR2 application.
- Upon user request approval, the Internal / External KYTC requestor shall receive email notification of their authorization.

Deny User Authorization Request:

- Selection of the "Deny" option shall NOT grant user authorization to the PSR2 application.
- Upon authorized user request denial, the Internal / External KYTC requestor shall receive email notification of their denied request.
- Authorized users can select the "View Users who have been Denied" link to navigate to the "Denied Users" requests.

User Authorization

View Users who have been Denied

Search:

Full Name	Org Type	Org Name	Org Role	Request Date	
Jill Eubanks	Consultants	ABCD Associates	Project Manager	9/14/2019	Edit Approve Deny

Showing 0 to 0 of 0 entries

View Denied User Authorization Requests:

- Selection of the "View Users who have been Denied" option within the "User Authorization" screen shall navigate the user the "Denied Users" screen that displays the denied user authorization requests within a grid.
    - User shall be able to sort on each column.
    - User shall be able to enter smart search criteria to locate a specific user.
- Selection of the "Approve" option shall grant user authorization to the PSR2 application.
- Upon user request approval, the Internal / External KYTC requestor shall receive email notification of their authorization.
- Selection of the "View User waiting Approval" shall navigate the user back to the "User Authorization" screen.

Denied Users

View Users waiting Approval

Search:

Full Name	Org Name	Org Role	Denied Date	Reason	Comment	
Adrian Wells	10	Project Manager	12/19/2018	Denied	User Deactivated	Approve
Clairessa Hamilton	Professional Services	Project Manager	12/19/2018	Denied	User Deactivated	Approve
Jonathan Alexander	Professional Services	Project Manager	3/21/2019	Denied	User Deactivated	Approve
Marie Floyd	Aviation	Professional Services Admin	12/19/2018	Denied	User Deactivated	Approve
Stacey KYTC	Palmer Engineering	Project Manager	6/11/2019	Denied	User Deactivated	Approve

Showing 1 to 5 of 5 entries

4.1 Admin Widget – Manage Type Tables

4.2 Admin Widget – Manage Selection Committee Pools

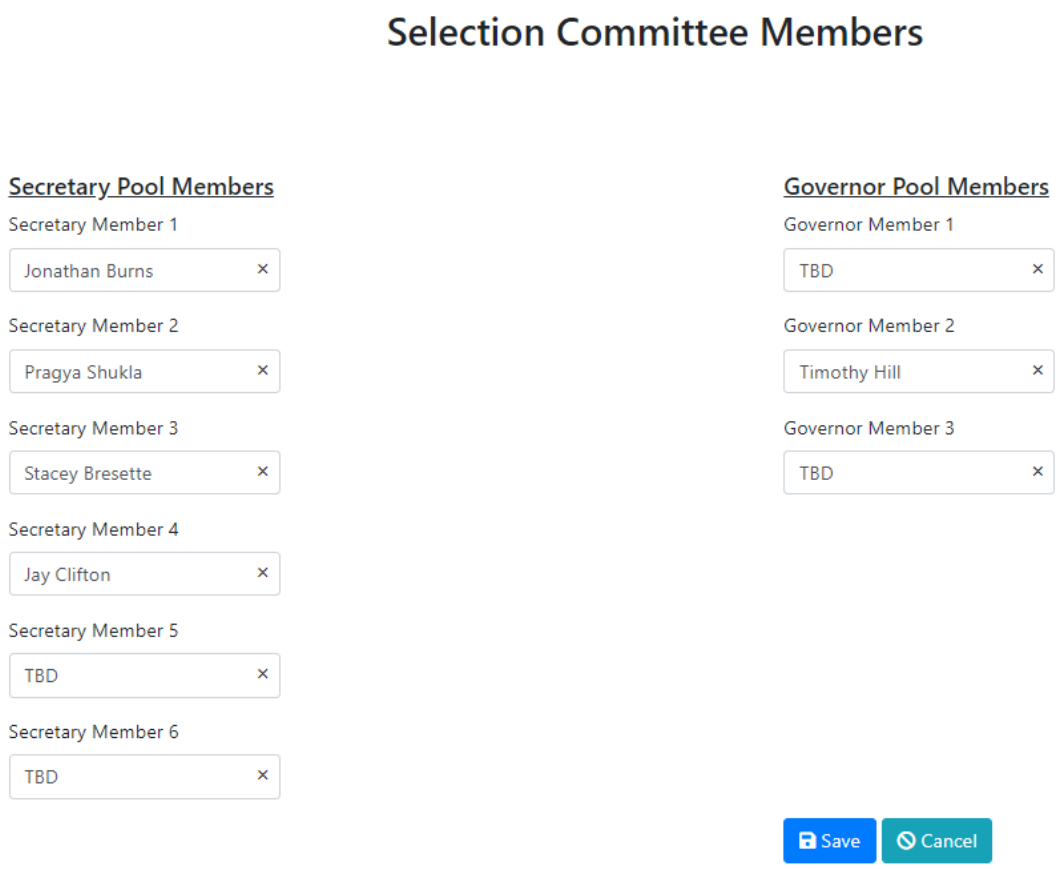
The Manage Selection Committee Pools option allows authenticated user the ability to manage Selection Committee Secretary and Governor Pool members. The Professional Services Selection Committee Pool is a randomly generated 5-person committee that selects the Prime, Second place, and Third place Consultant firms that will perform the services for Project Specific and Statewide projects.

The Selection Committee Pool usually consists of:

- 1 Governor's Pool member (non-KYTC employee)
- 2 Secretary's Pool members (Professional Engineers)
- 2 User Division Pool members (usually PM's)

Selection Committee Pool members typically serve for 2-year cycles. If a Pool member leaves during the middle of a 2-year cycle, the replacement Pool member simply takes over the unoccupied spot for the remainder of the cycle.

The Professional Services Admin (PSA) role shall have access to this widget.



5 Consultant Management Widget

The Consultant Management widget provides a central location to display Consultant firm contact information. All authenticated PSR2 users shall see the Consultant Management widget within the Dashboard.

Consultant Contact records are utilized by the Professional Services group throughout all phases of the prequalification and estimation processes for both Project Specific and Statewide contracts.

Consultant firms shall manage their own organization's contact information and employee's contact information within the PSR2 application.

5.1 Consultant Management Screen

Select "Consultant Management" Widget (Internal KYTC user):

- Selection of the "Consultant Management" widget shall navigate the Internal KTYC user to the "Consultant Management" screen that displays all of the Consultant firm records within a grid.
    - User shall be able to sort on each column.
    - User shall be able to enter smart search criteria to locate a specific Consultant firm record.

Consultant Management

+ Add Consultant

Show 10 entries

Search:

Legal Name	Alias	Address	Primary Contact	Renewal Due Date	DBE	Status	
AMERICAN ENGINEERS INC	American Engineers, Inc.	65 Aberdeen Drive Glasgow, KY 42141-8238	Peter Overmohle	3/1/2020	No	Active	Edit
ARNOLD CONSULTING ENGINEERING	Arnold Consulting Engineering Services, Inc.	P.O. Box 1338 Bowling Green, KY 42102	N/A	7/1/2019	No	Active	Edit
BACON FARMER WORKMAN ENGINEERING & TESTING, INC.	Bacon, Farmer, Workman Engineering & Testing, Inc.	500 South 17th Street Paducah, KY 42003	Jason Landes	11/1/2019	No	Active	Edit
BLUEGRASS VALUATION GROUP LLC	Bluegrass Valuation Group, LLC	366 Waller Avenue Suite 203 Lexington, KY 40504	N/A	7/25/2019	No	Inactive	Edit
BTM ENGINEERING INC	Birch, Trautwein & Mims Engineering, Inc.	200 Mero Street Frankfort, KY 40601	N/A	7/25/2019	No	Inactive	Edit
BURGESS AND NIPLE INC	Skees Engineering, Inc.*	200 Mero Street Frankfort, KY 40601	N/A	7/25/2019	Yes	Inactive	Edit
BURGESS AND NIPLE INC	Burgess & Niple, Inc.	400 Blankenbaker Parkway, Suite 300 Louisville, KY 40243	N/A	12/1/2019	No	Active	Edit
CDM Smith Inc	CDM Smith, Inc.	2525 Harrodsburg Road, Suite 200 Lexington, KY 40504	N/A	7/1/2019	No	Active	Edit
CDP ENGINEERS INC	CDP Engineers, Inc.	3250 Blazer Parkway Lexington, KY 40509	N/A	11/1/2019	No	Active	Edit
COMMUNITY TRANSPORTATION SOLUTIONS	Community Transportation Solutions	200 Mero Street Frankfort, KY 40601	N/A	7/25/2019	No	Inactive	Edit

Showing 1 to 10 of 396 entries

Previous 1 2 3 4 5 ... 40 Next

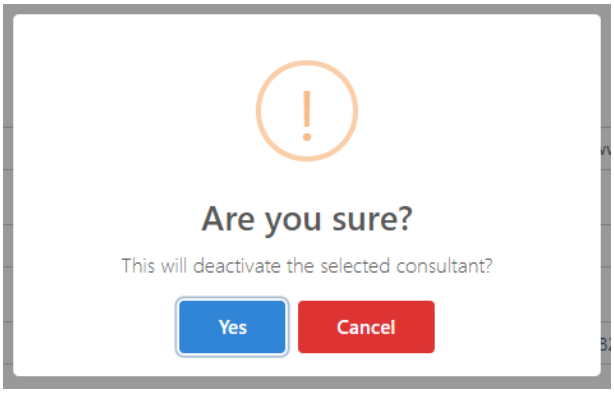
Privacy | Security | Disclaimer | Accessibility

View / Edit Consultant Record (Internal KYTC user):

- Selection of the "Edit" option within a Consultant record line item shall navigate the user to the "Edit Consultant" screen.
- The KYTC PSA role shall have view and edit access to the "Edit Consultant" screen for all Consultant firms.
- Non-PSA roles (KYTC Project Managers, etc.) shall have view only access to the "Edit Consultant" screen for all Consultant firms.

Deactivate Consultant Record (Internal KYTC user):

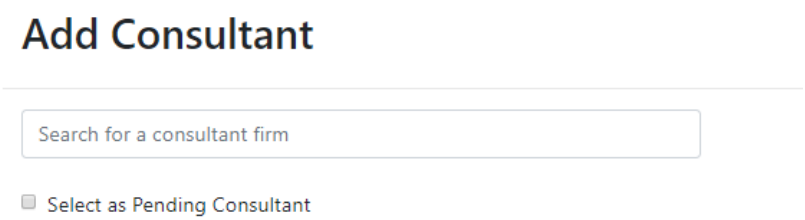
- The KYTC PSA role shall see a "Deactivate" option for each Consultant record on the "Edit Consultant" screen.
- Selection of the "Deactivate" option shall display the "Are you sure? – This will deactivate the selected consultant?" pop-up window.
    - Selection of the "Yes" option shall deactivate the Consultant from the PSR2 application.
    - Selection of the "Cancel" option shall NOT deactivate the Consultant from the PSR2 application.

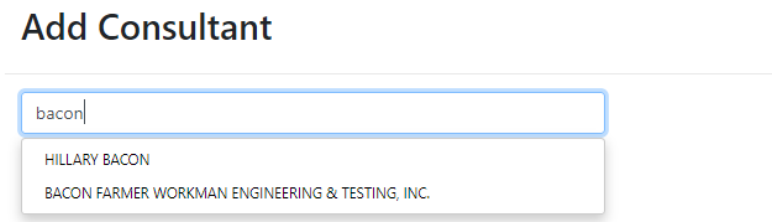


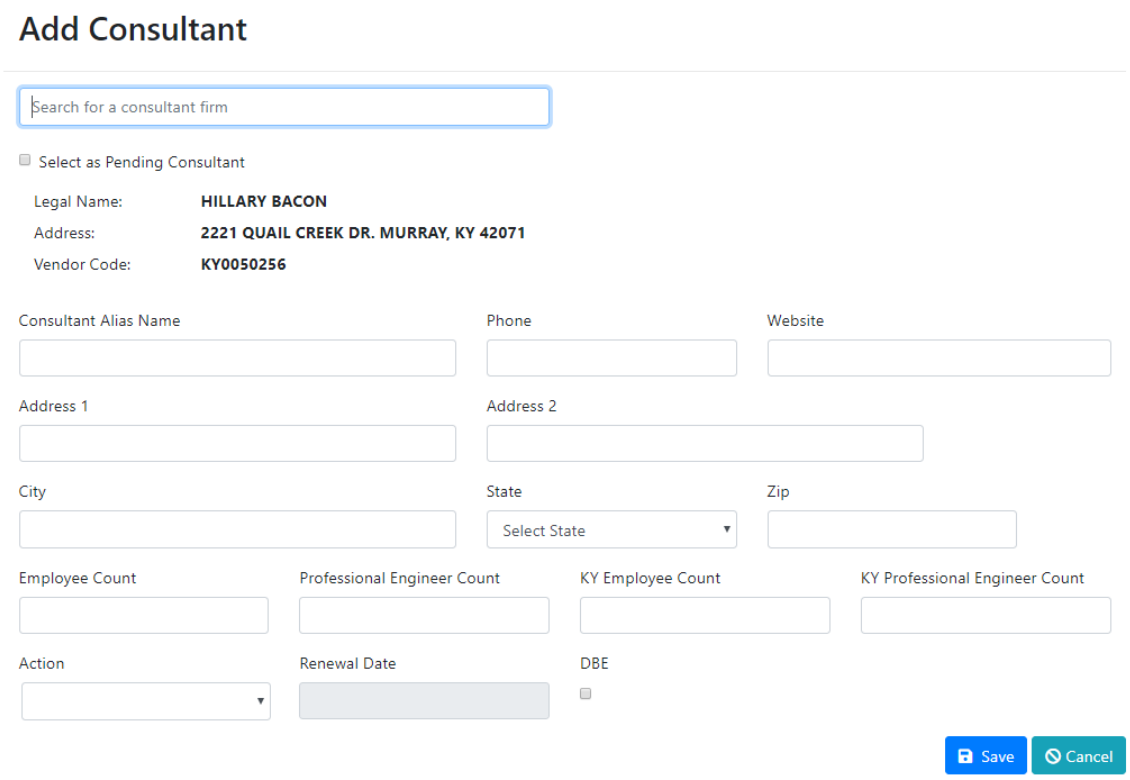
Add Consultant Record (Internal KYTC user):

- The KYTC PSA role shall see an "Add Consultant" option within the "Consultant Management" screen.
    - Non-PSA roles (KYTC Project Managers, etc.) shall NOT see an "Add Consultant" option within the "Consultant Management" screen.
- Selection of the "Add Consultant" option shall navigate the user to the "Add Consultant" screen.
- The user can add a Consultant firm by typing in the desired Consultant name in the "Search for a consultant firm" field
    - A Consultant firm must reside in the KYTC eMARS application before it appears in the smart search criteria results.
- Selection of the desired Consultant firm name within the "Search for a consultant firm" field shall display the following Consultant contact information that resides in the KYTC eMARS application:

  - Legal Name
  - Address
  - Vendor Code (eMARS)
- Upon selection of the desired Consultant firm, the user shall see a form where they can add additional Consultant contact information form (e.g. Consultant Alisa Name, Address, Phone, Employee Count, etc.).
  - Note: The Consultant contact information in eMARS may differ from the day-to-day contact information used by the Professional Services group. For example, the eMARS address might feature the Consultant firm's corporate headquarters located in New York; but the day-to-day contact information is based in Kentucky, etc.
  - Upon successful entry of the Consultant contact information form, selection of the "Save" option shall save the Consultant information to the PSR2 application.
    - Selection of the "Cancel" option shall NOT save the Consultant information to the PSR2 application.

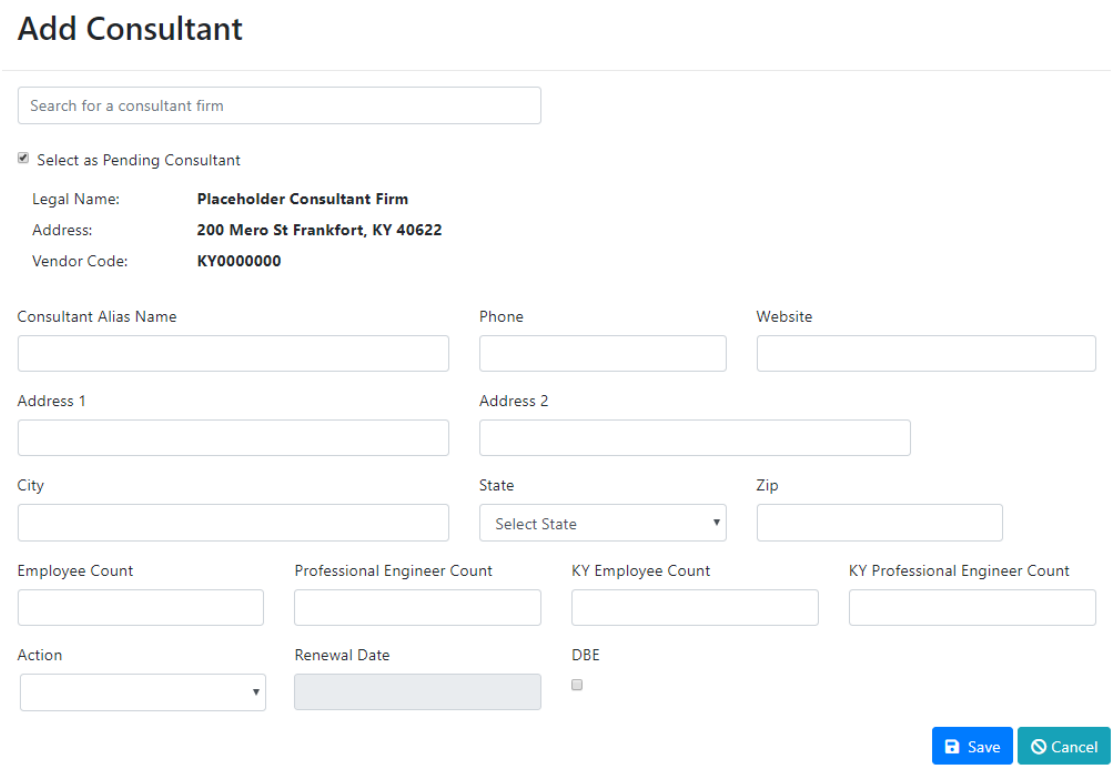






<u>"Select as Pending Consultant" Option (Internal KYTC user):</u>

- All Consulting firms must complete the Prequalification process before consideration for a Professional Services contract. During this period, the Consultant firm may not have a vendor / consultant record in the KYTC eMARS application.
- If there is an instance that the Professional Services group wants to add a Consultant firm to the PSR2 application that is NOT yet in the KYTC eMARS application, the user may select the "Select as Pending Consultant" option.
- Selection of the "Select as Pending Consultant" option shall auto-populate the following information:
    - Legal Name: **Placeholder Consultant Firm**
    - Address: **200 Mero St., Frankfort, KY 40622**
    - Vendor Code: **KY0000000**
- The user can then populate the remainder of the "local" Consultant information (e.g. Consultant Alias Name, Phone, Address, Renewal Due Date, DBE, etc.) to add the record to the application.
    - Note: This information shall only be stored in the PSR2 application locally. The information shall NOT be saved in the KYTC eMARS application.
- When the consultant is selected for a PS contract, their vendor record will be added to eMARS. At that point, the Professional Services Admin user shall edit / match the consultant's eMARS record to that of the current "local" consultant record in the PSR2 application.



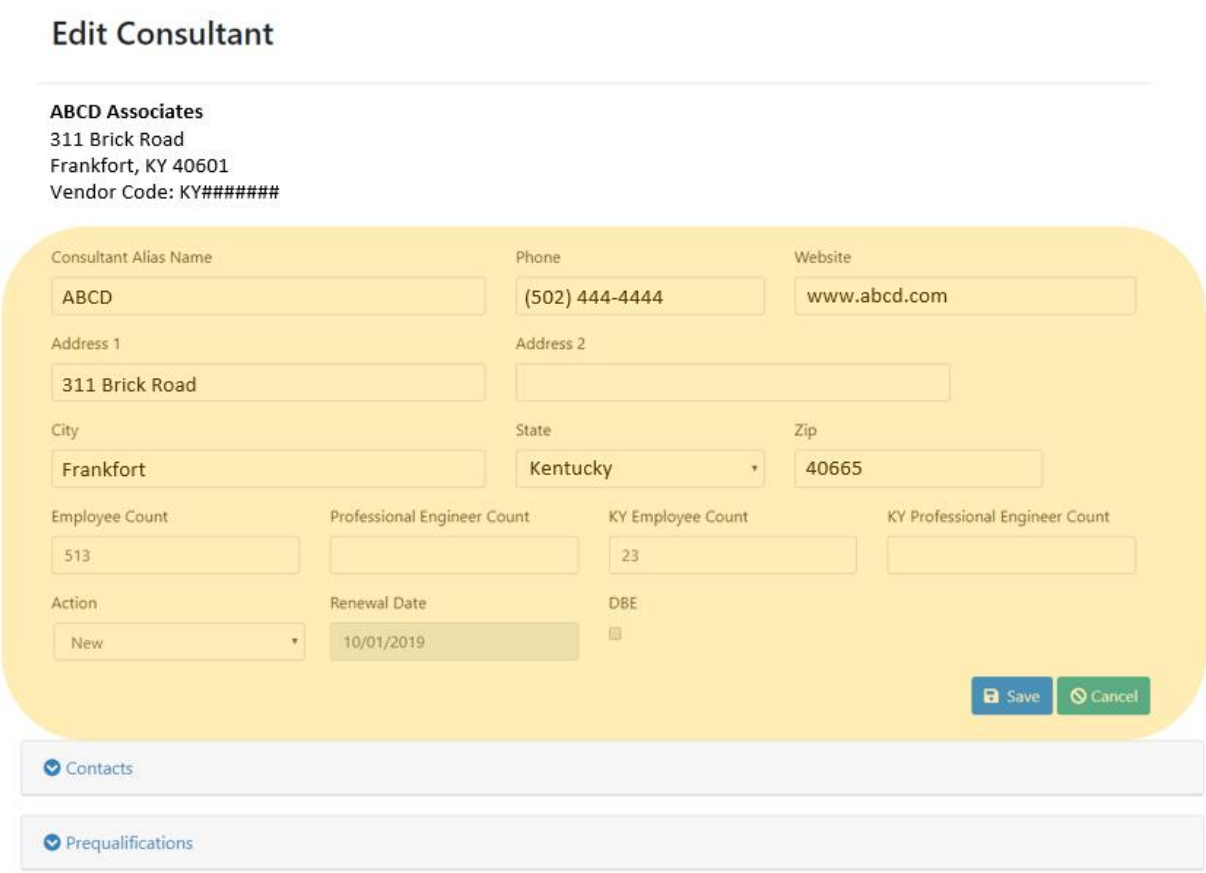
5.2 Edit Consultant Screen

Select the "Consultant Management" widget (Consultant user):

- Selection of the "Consultant Management" widget shall navigate the Consultant user to the "Edit Consultant" screen displaying their firm's contact information.
    - The Consultant – System Admin role shall be able to edit their firm's Consultant information.
    - The Consultant – Project Manager role shall be able to only view their firm's Consultant information.
    - The Consultant – Read Only role shall be able to only view their firm's Consultant information.

Edit Consultant Record (Consultant – System Admin):

- The Consultant – System Admin role shall be able to edit their firm's Consultant information.
    - Selection of the "Save" option shall save any update / changes to the PSR2 application.
    - Selection of the "Cancel" option shall NOT save any update / changes to the PSR2 application.

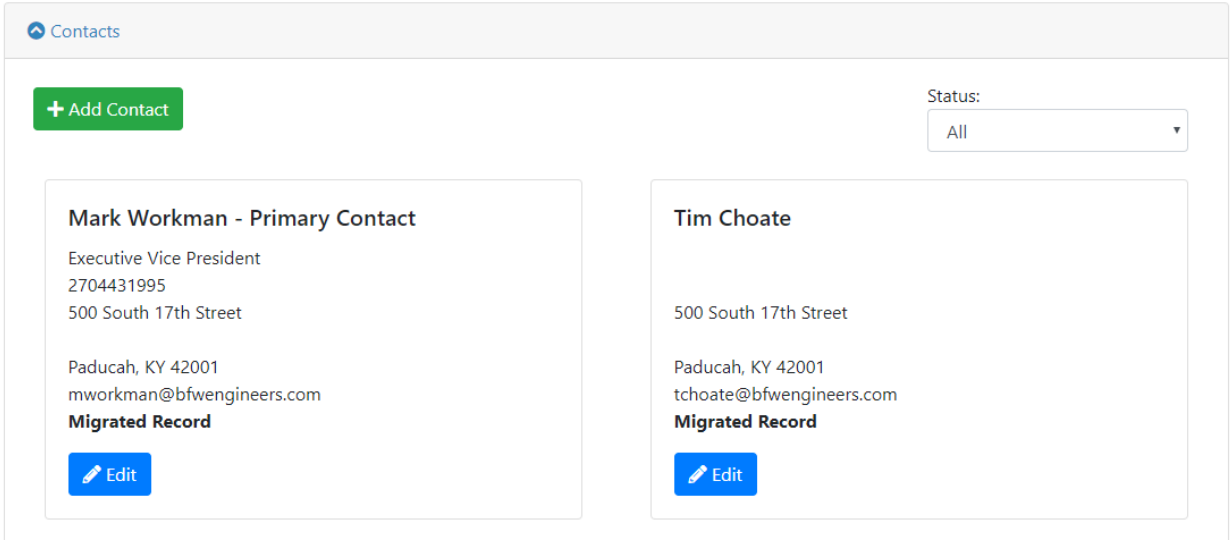


5.3 Contacts Tab

- The "Edit Consultant" screen shall contain a "Contacts" tab that contains a Consultant firm's Contact Cards.
- Consultant Contact Cards are added automatically to the firm's "Contacts" tab once a Consultant's User Authorization request is approved.
- Contact Cards can be added manually to the application for non-PSR2 users.

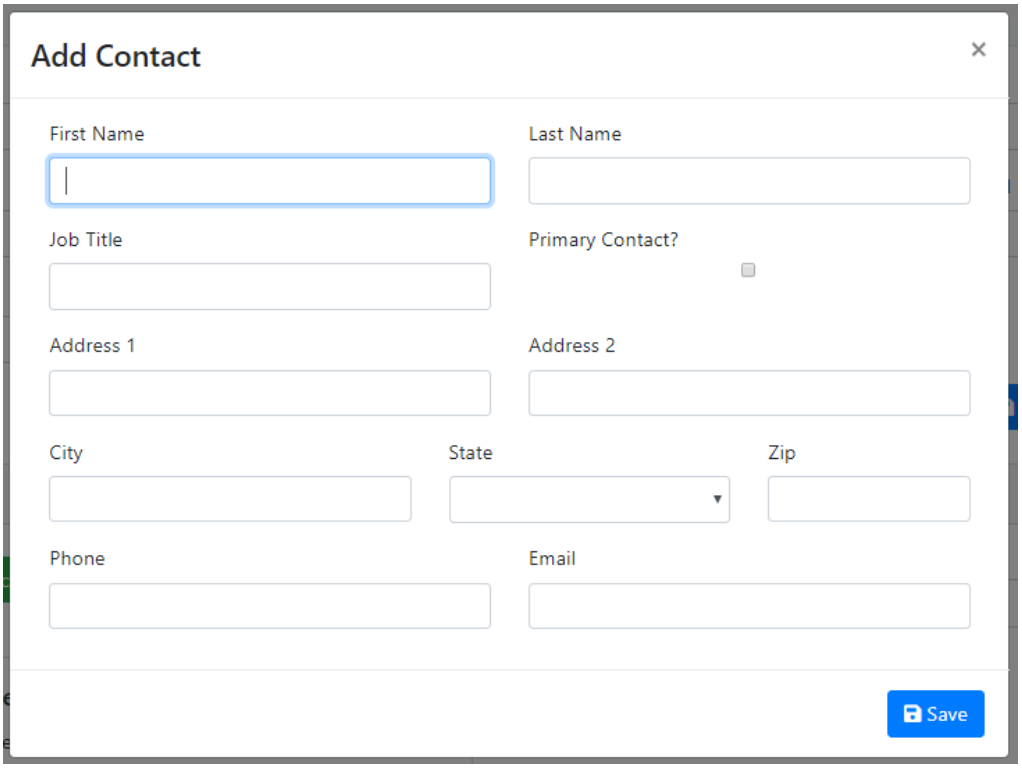
View Contacts Tab:

- Selection of the "Contacts" tab shall display the following:
  - "Add Contact" option
  - Status filter (All / Active / Inactive)
  - Consultant Contact Cards



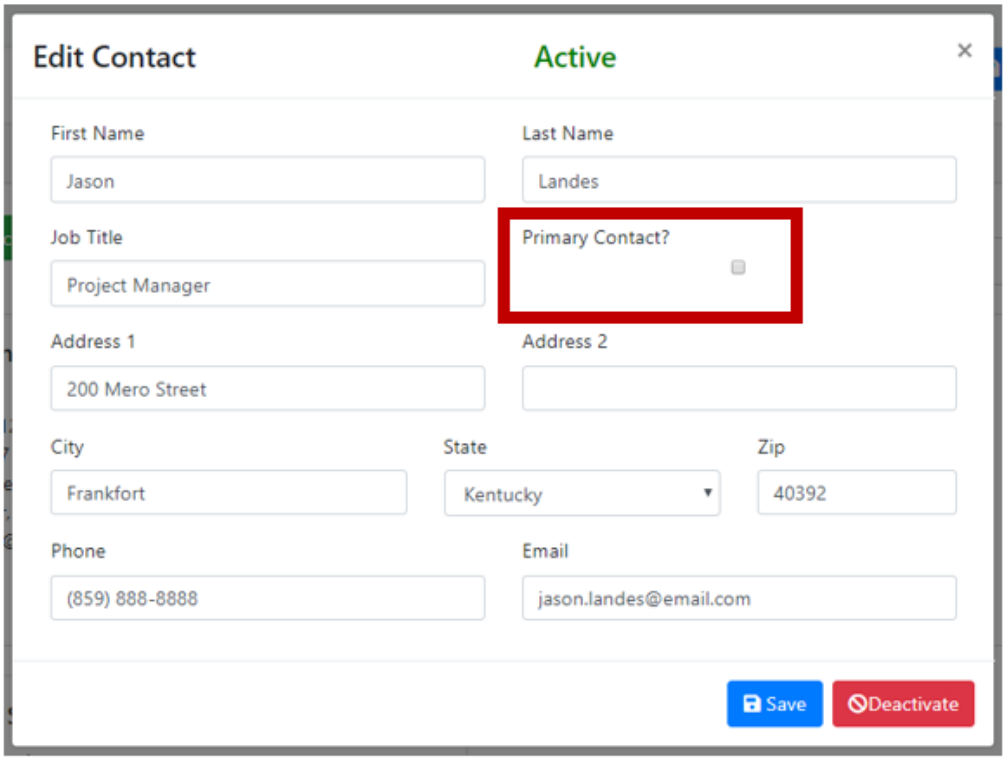
Add Contact Card (Consultant – System Admin):

- The Consultant – System Admin role shall see the "Add Contact" option within the "Contacts" tab.
- Selection of the "Add Contact" option shall display an "Add Contact" pop-up window.
- Upon successful entry of the required Contact Card information within the "Add Contact" pop-up, selection of the "Save", option shall display the newly added Contact Card within the "Contacts" tab.
    - Selection of the "Cancel" option shall NOT save the Contact Card.



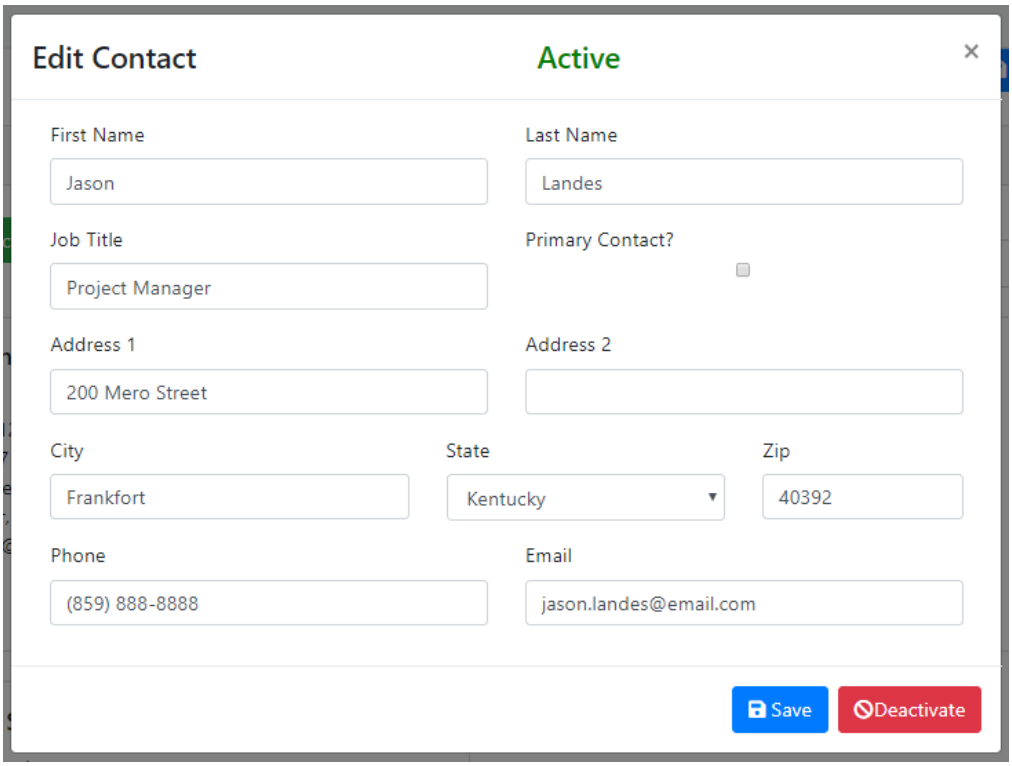
Select "Primary Contact?" Option:

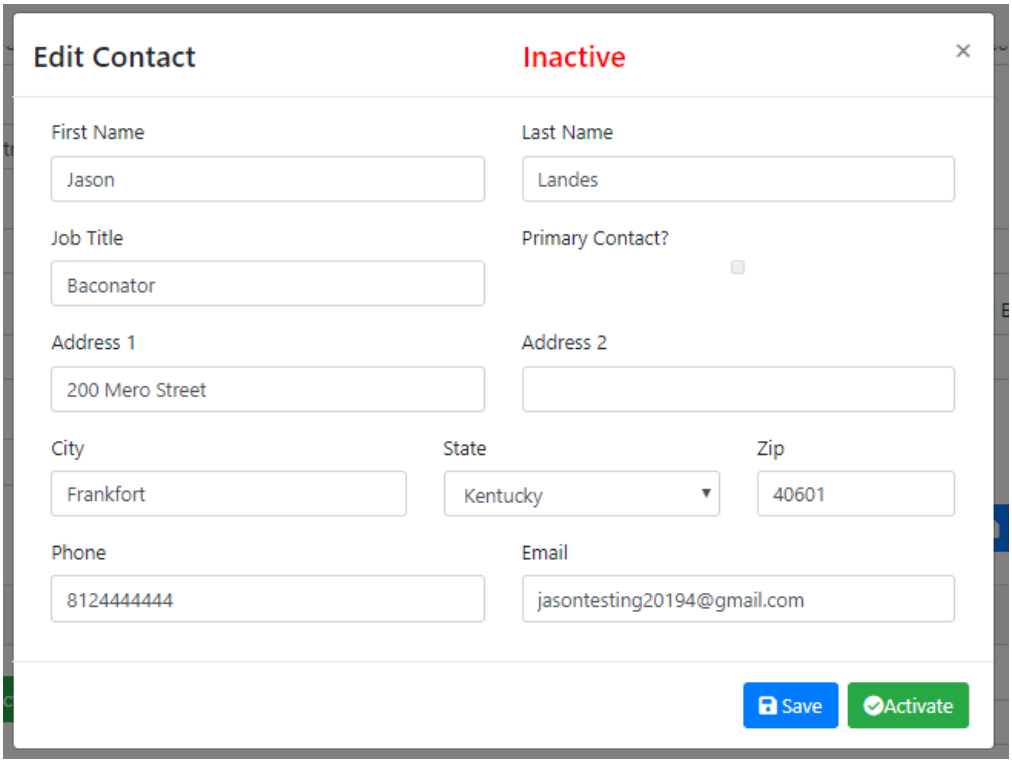
- The first Contact Card added to a Consultant firm shall serve as the "Primary Contact".
- At any time, the "Primary Contact" can be switched to another user by selecting the "Primary Contact?" option within that Contact's individual "Add / Edit Contact" pop-up window.
    - Only one Contact per Consultant firm shall serve as the "Primary Contact".
    - Contact identified as the "Primary Contact" shall be edited, but cannot be deactivated.
    - By default, the "Primary Contact" card shall display first in the "Contacts" tab.



Edit Contact Card (Consultant – System Admin):

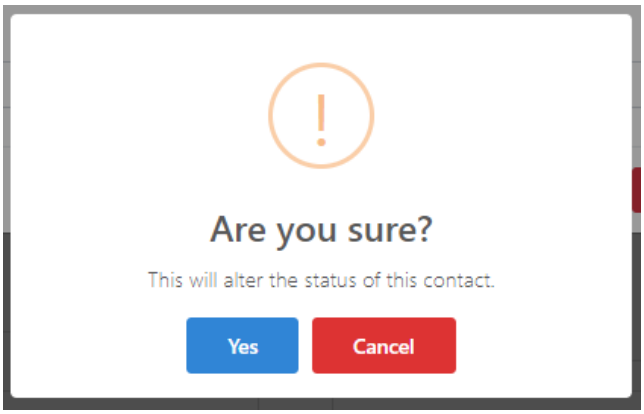
- The Consultant – System Admin role shall see the "Edit" option for each Contact Card within the "Contacts" tab.
- Selection of the "Edit" option shall display the "Edit Contact" pop-up window.
- Upon successful update, selection of the "Save" option shall save and display those edits within the Contact Card.
    - Selection of the "Close Window" option shall NOT save the edits made to the Contact Card.
- Both "Active" and "Inactive" Contact Cards may be edited.

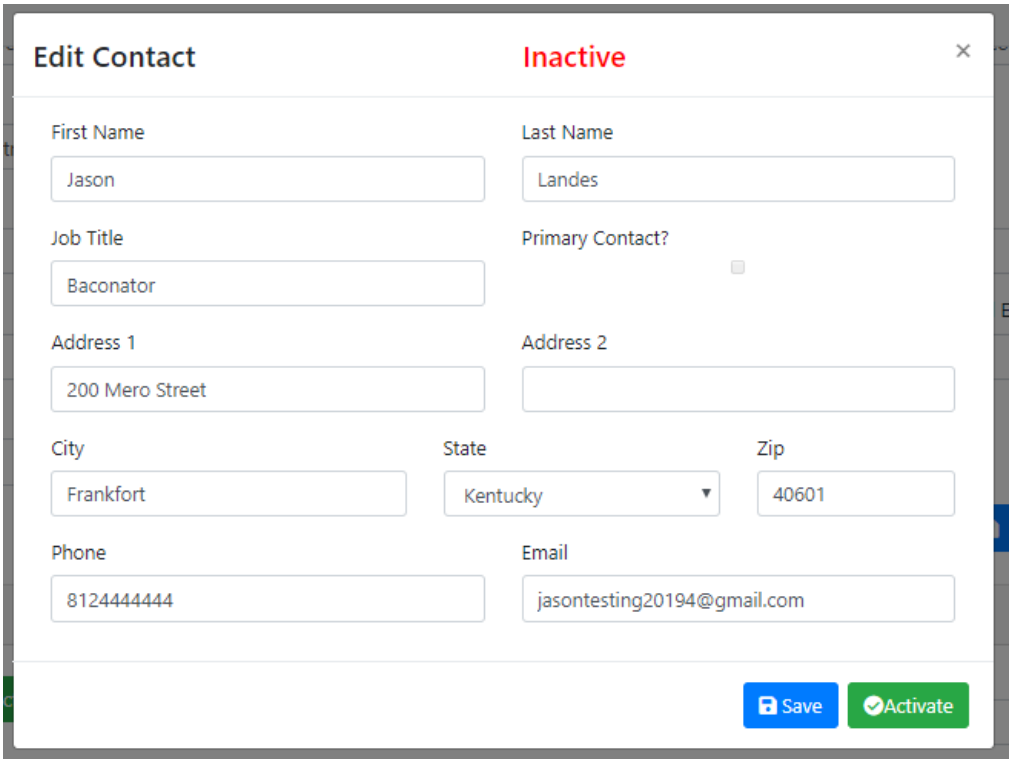

Edit Contact
Active
First Name
Jason
Last Name
Landes
Job Title
Project Manager
Primary Contact?
Address 1
200 Mero Street
Address 2
City
Frankfort
State
Kentucky
Zip
40392
Phone
(859) 888-8888
Email
jason.landes@email.com
Save
Deactivate


Edit Contact
Inactive
First Name
Jason
Last Name
Landes
Job Title
Baconator
Primary Contact?
Address 1
200 Mero Street
Address 2
City
Frankfort
State
Kentucky
Zip
40601
Phone
8124444444
Email
jasontesting20194@gmail.com
Save
Activate

Deactivate Contact Card (Consultant – System Admin):

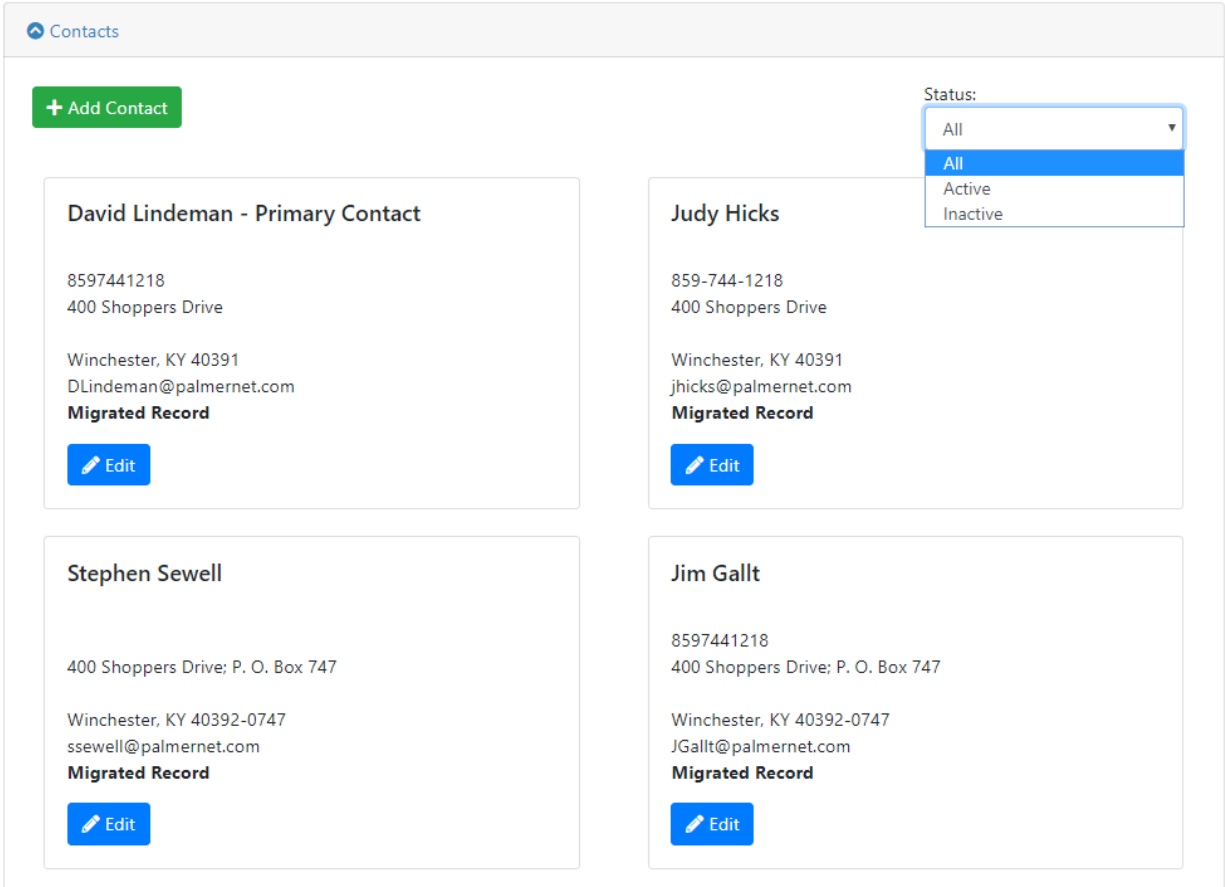
- The Consultant – System Admin role shall see a “Deactivate” option for each Contact Card within the “Edit Contact” window.
- Selection of the “Deactivate” option shall display the “Are you sure? – This will alter the status of this contact” pop-up message.
    - Selection of the “Yes” option shall deactivate the Contact Card.
        - Deactivated Contract Card shall display “Inactive” within the “Edit Contact” view
    - Selection of the “Cancel” option shall NOT deactivate the Contact Card.
- A deactivated Contact Card shall be “reactivated” at any time by selecting the “Activate” option within the “Edit Contact” view.





Select Status Filter:

- Selection of the Status filer within the "Contacts" tab shall display the following filter options:
  - All (Default) – Displays view of both Active and Inactive Contact Cards
  - Active – Displays only Active Contact Cards
  - Inactive – Displays only Inactive Contact Cards



5.4 Prequalifications Tab

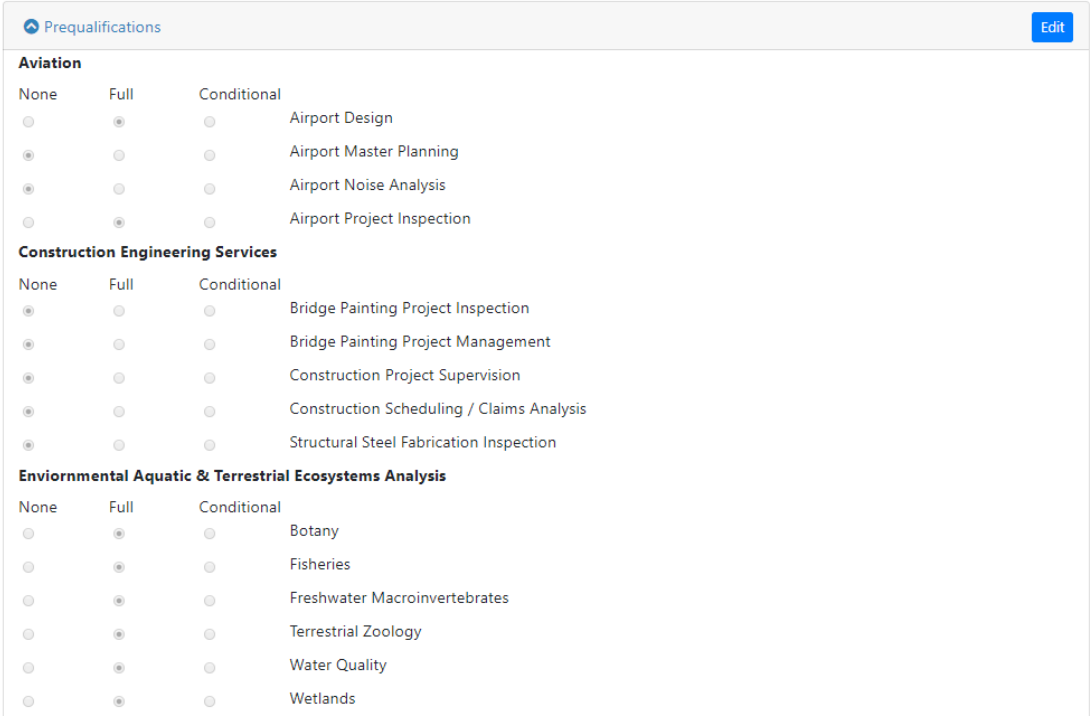
- The "Edit Consultant" screen shall contain a "Prequalifications" tab that contains the Consultant firm's current list of Prequalifications.
- Internal KYTC users shall be able to view the Prequalifications for any firm.
- Only the KYTC PSA role shall be able to edit the Prequalifications for any firm.
- A Consultant firm user may be able to view their own firm's Prequalifications, but shall NOT be able to edit.

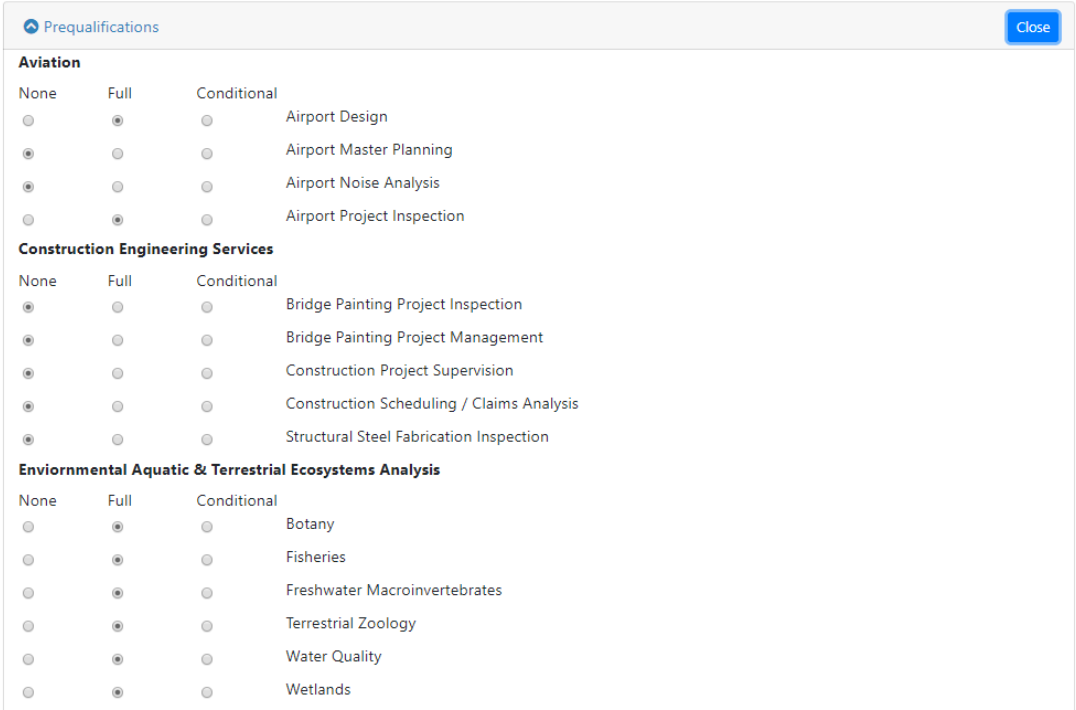
Edit Prequalifications:

- The KYTC PSA role shall see an "Edit" option within any Consultant firm's "Prequalifications" tab.
- Selection of the "Edit" option shall enable the user to update the following for each category:
  - None
  - Full

- Conditional

- Upon each edit, the PSR2 application will auto-save the changes.
- Selection of the “Close” option shall close the “Prequalifications” tab.





6 Bulletin Widget

Bulletins are a collection of Advertisements posted monthly on the Professional Services website for consultants to respond and inquire about. The Bulletin is comprised of the projects that Professional Services will procure services for in that particular month. The Bulletin widget allows the user to manage bulletins and group projects under the appropriately scheduled bulletin.

The PSR2 application will automate Bulletin ID's 3 months in advance. This will auto populate the Bulletin, Month and Advertisement Date. The Advertisement Date is always the second Tuesday of the month at 9:00 a.m. (EST).

Only KYTC users added to the "Bulletins" Exception List can invoke the creation of a Bulletin under special circumstances (ex. Bulletin needed outside of normal schedule, etc.).

6.1 Select Bulletin Widget

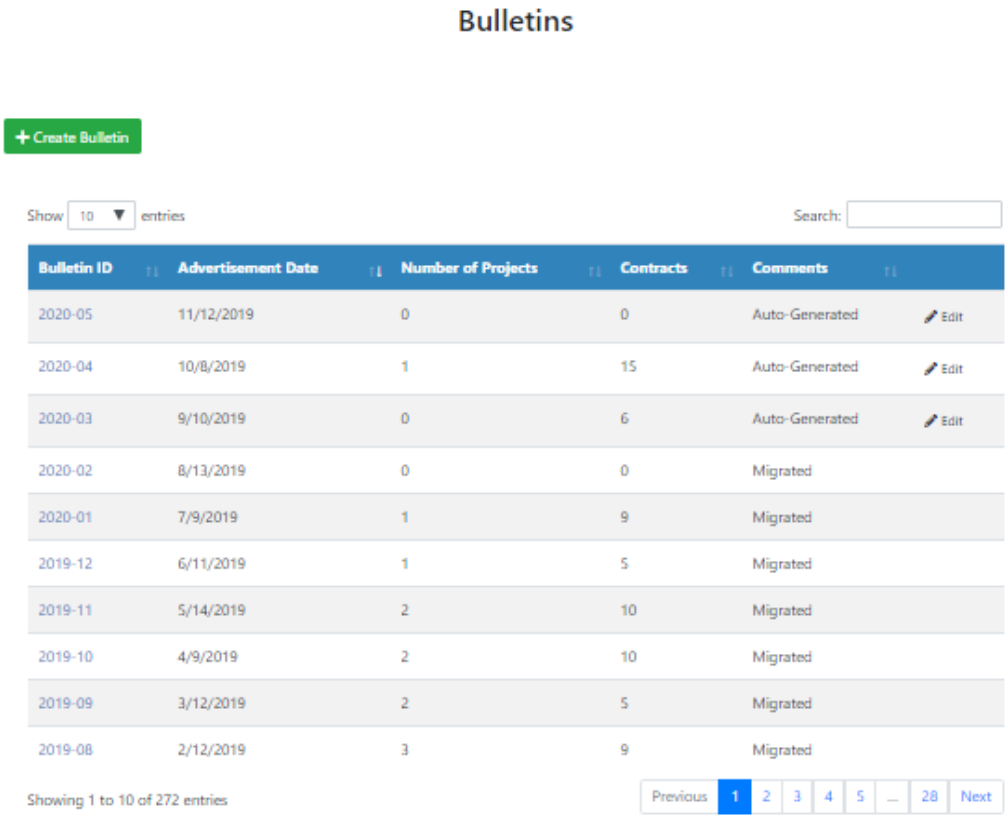
Select Bulletin Widget:

- Selection of the "Bulletin" widget from the Dashboard shall navigate the user to the "Bulletin" screen.

6.2 Bulletin Screen

Bulletin Screen:

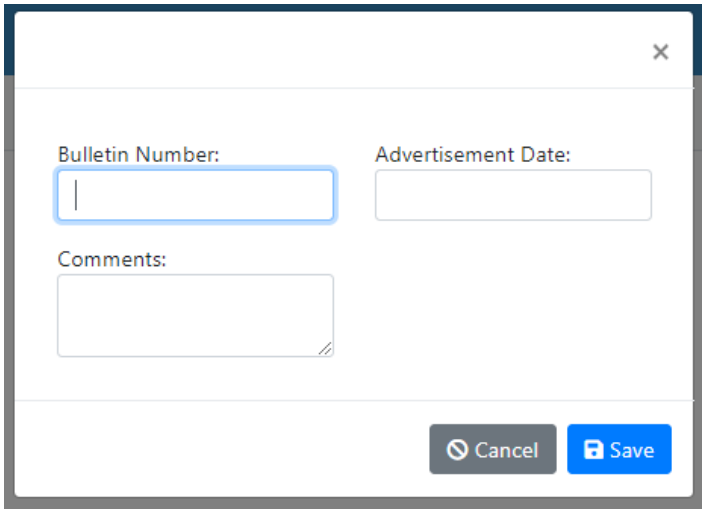
- The "Bulletin" grid displays view all Contracts and Projects that have been associated with that particular bulletin month.
    - User shall be able to sort on each column.
    - User shall be able to enter smart search criteria to locate a specific Bulletin record.
    - Selection of the "Bulletin ID" within each row shall navigate the user to the 'Bulletin Project Grid" for that Bulletin



6.3 Create Bulletin

Create Bulletin (KYTC PSA user):

- The authenticated user shall see a “Create Bulletin” option on the “Bulletins” screen.
- Selection of the “Create Bulletin” option from the Bulletin screen shall display a pop-up window prompting the user to enter Bulletin related information:
    - Bulletin Number
    - Advertisement Date
    - Comments
        - Upon selection of “Save” option, the new Bulletin shall be saved to the application and display within the Bulletin grid.
        - Upon selection of “Cancel” option, the new Bulletin record shall NOT be saved to application and will NOT be displayed within the Bulletin grid.



6.4 View / Edit Bulletin

View / Edit Bulletin:

- Selection of the “Edit” option next to a Bulletin listing in the Bulletin grid shall display an “Edit” pop-up window that displays the following:
    - Bulletin Number (not editable)
    - Advertisement Date (editable)
    - Comments (editable)
        - Upon selection of the “Save” option, the edits made to the Bulletin record shall be saved to the PSR2 application.
        - Upon selection of the “Cancel” option, edits made to the Bulletin record shall NOT be saved to the PSR2 application.

7 Statewide Service Widget

The Division of Professional Services procures consultant-engineering services defined by Statewide Contracts or "Other" Statewide Contracts. Regular Statewide Contracts are generally on 2-year project life cycles, while "Other" Statewide Contracts have variable project life cycles. The Professional Services Admin role may create a new Statewide Service at any time.

Users shall NOT manually create Statewide Service Advertisement / Request for Proposal (RFP) document. Instead, the Professional Services application will create an Advertisement / RFP document once the "Advertisement Date" value of that Statewide Service is within 90 days or less.

Each individual Statewide Service may have one or many contracts tied to that service. The number of Statewide Contracts created will correlate to number of "Firms" entered when the Statewide Service is created / edited. (e.g. 3 Firms = 3 Contracts, etc.).

The Statewide Services screen allows the user to:

- Monitor Advertisement dates
- Make updates to existing Statewide Services
- Add new Statewide Service

The KYTC PSA role and KYTC Central Office – Project Manager shall have access to the Statewide Service widget.

7.1 Select Statewide Widget

Select Statewide Service Widget (KYTC PSA and Central Office – Project Manager):

- Selection of the "Statewide Service" widget from the Dashboard shall navigate the user to the "Statewide Service" screen.

7.2 Statewide Service Grid

Statewide Service Grid (KYTC PSA and Central Office – Project Manager):

- Selection of the "Statewide Service" widget shall navigate the user to the "Statewide Services" grid.

- User shall be able to sort on each column.
- User shall be able to enter smart search criteria to locate a specific Consultant firm record.
- User shall be able to filter the gird based on the "Status" of the Statewide Service:
  - All
  - Active
  - Inactive

Statewide Services

+ Add Service

Status:

All

Show 10 entries

Search:

Next Advertisement Date	Service	Division	Project Manager	Category Type	Status	
10/13/2009	Tunnel Management & Operations	Maintenance	Tina Swansegar	Other	Active	Edit
10/13/2009	Tunnel Management & Operations	Maintenance	Tina Swansegar	Other	Active	Edit
8/9/2016	Intelligent Transportation Systems - TRIMARC	Maintenance	Tina Swansegar	Other	Active	Edit
8/9/2016	Bridge Load Ratings	Maintenance	Evan Dick	Other	Active	Edit
8/9/2016	Intelligent Transportation Systems - TRIMARC	Maintenance	Tina Swansegar	Other	Active	Edit
8/9/2016	Bridge Load Ratings	Maintenance	Evan Dick	Other	Active	Edit
9/12/2017	Scour Assessment & Cross Section Services	Maintenance	Erin VanZee	Other	Active	Edit
9/12/2017	Scour Assessment & Cross Section Services	Maintenance	Erin VanZee	Other	Active	Edit
12/12/2017	Preventative Maintenance Repairs	Maintenance	Evan Dick	Other	Active	Edit
12/12/2017	Preventative Maintenance Repairs	Maintenance	Evan Dick	Other	Active	Edit

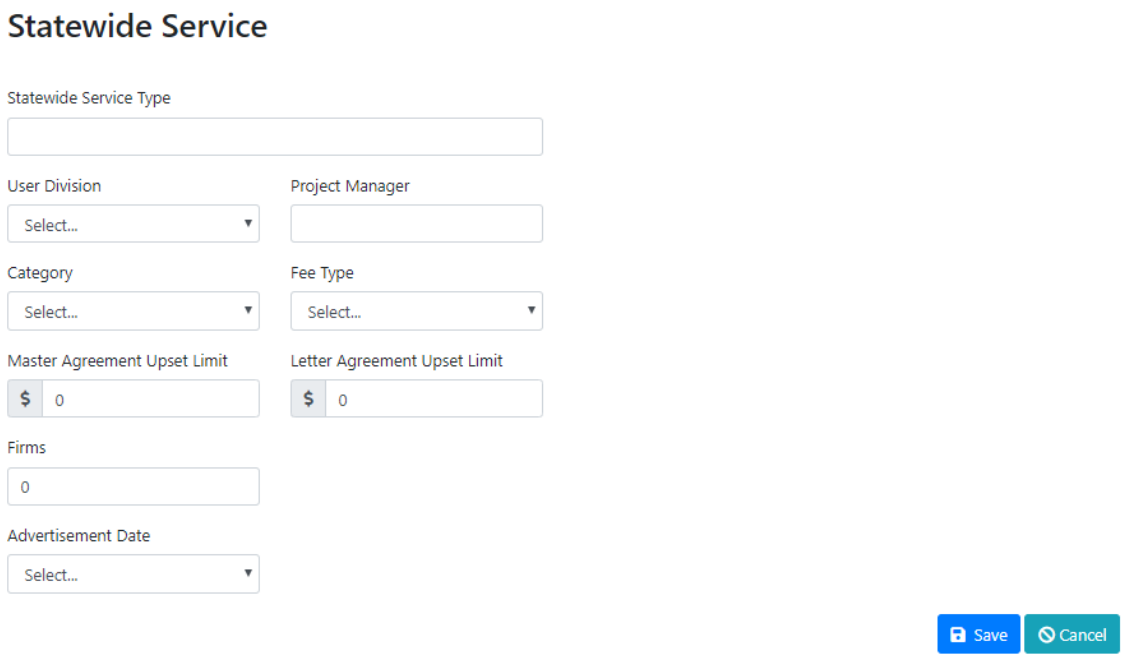
Showing 1 to 10 of 131 entries

Previous 1 2 3 4 5 ... 14 Next

7.3 Add Statewide Service

Add Statewide Service (KYTC PSA):

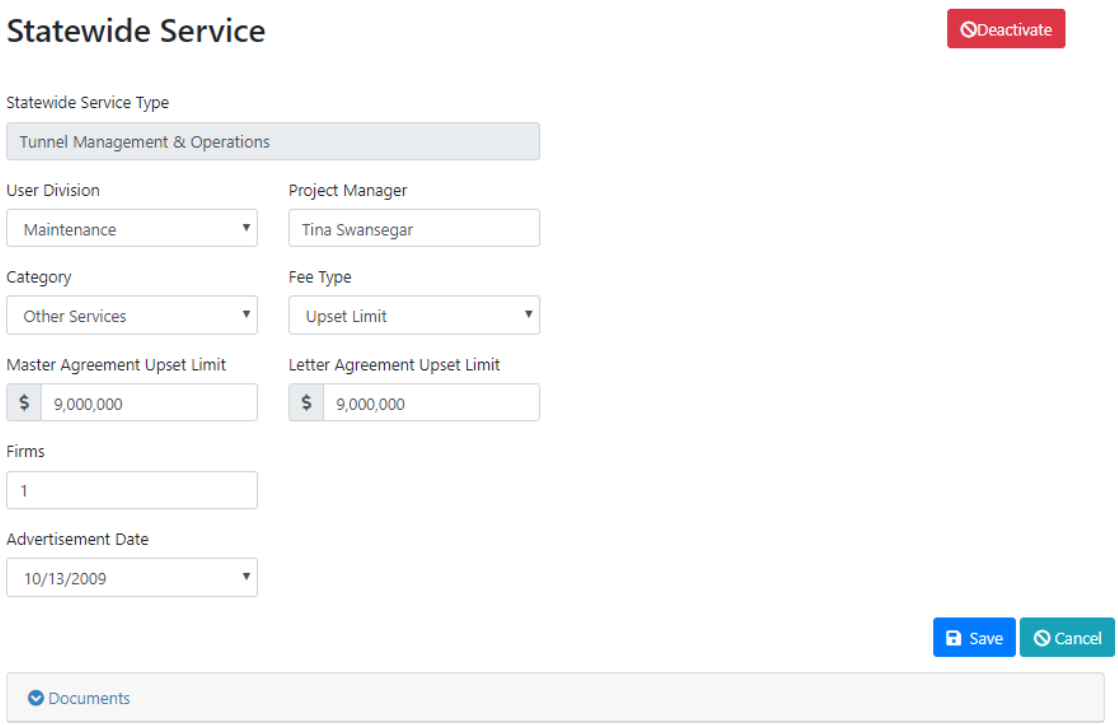
- Selection of the "Add Service" option within the Statewide Services screen shall navigate the user to the "Add Statewide Service" screen.
- User shall be able to enter the following:
  - Statewide Service Name
  - User Division
  - Project Manager (KYTC)
  - Category
    - Regular Statewide
    - Other Services
  - Fee Type
    - Upset Limit
    - Lump Sum
    - Specific Rate of Compensation
    - Cost Plus Fixed Fee
  - Firms (Number value indicates the number of Contracts that will be created for that Service)
  - Advertisement Date
- Selection of the "Save" option shall save the Statewide Service to the PSR2 application.
  - The newly created Statewide Service shall be displayed within the "Statewide Service" grid.
  - The Statewide Contracts that are created with the new Statewide Service shall display in the "Contracts - Statewide Contracts" grid within the Dashboard.
- Selection of the "Cancel" option shall NOT save the Statewide Service to the PSR2 application.
- When a new Statewide Service is created, the system will auto-create an Advertisement / RFP document template.
  - This document will serve as the template for all subsequent Advertisments / RFP documents for that that Statewide Service.
- If the Statewide Service is created with an "Advertisement Date" value that is within 90 days or less of the date created, the system will also create an Advertisement document.



7.4 View / Edit Statewide Service

View / Edit Statewide Service (KYTC PSA and Central Office – Project Manager):

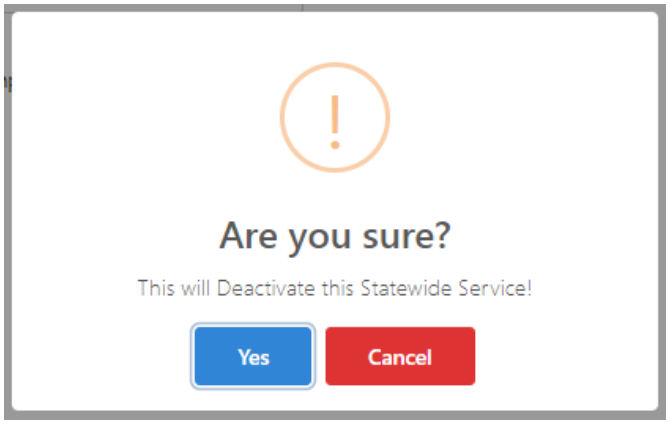
- Selection of the "Edit" option within "Statewide Services" grid shall navigate the user to the Statewide Service screen.
    - A Central Office – Project Manager shall only be able to view the Statewide Services they are assigned as the Project Manager.
    - The assigned Central Office – Project Manager shall NOT be able to edit the Statewide Service.
    - The assigned Central Office – Project Manager shall be able to view / edit / regenerate the "Advertisement" document for that Statewide Service.
- The KYTC PSA user shall be able to edit the Statewide Service as needed.
    - Selection of the "Save" option shall save the edits made to the Statewide Service to the PSR2 application.
    - Selection of the "Cancel" option shall NOT save the edits made to the Statewide Service to the PSR2 application.



7.5 Deactivate Statewide Service

Deactivate Statewide Service (KYTC PSA):

- The KYTC PSA user shall be able to see a "Deactivate" option within the Statewide Service screen.
- Selection of the "Deactivate" option shall display a "Are you sure? – This will Deactivate this Statewide Service!" pop-up window.
    - Selection of "Yes" option shall deactivate the Statewide Service.
    - Selection of "Cancel" option shall NOT deactivate the Statewide Service.



7.6 Statewide Service – Documents Tab

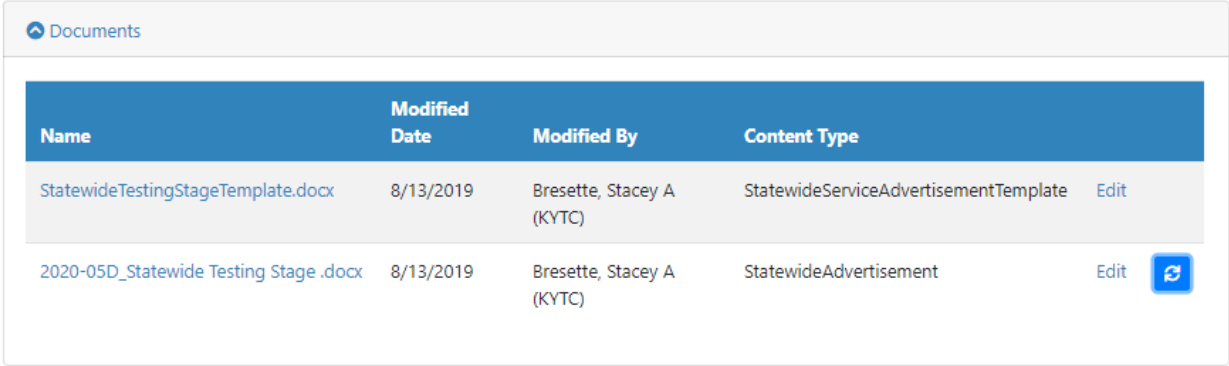
Statewide Service - Documents Tab (KYTC PSA and Central Office – Project Manager):

- The "Documents" tab contains applicable documents for that Statewide Service.
- When a new Statewide Service is created, the system will auto-create an Advertisement / RFP document template.
    - This document will serve as the template for all subsequent Advertisments / RFP documents for that that Statewide Service.
- If the Statewide Service is created with an "Advertisement Date" value that is within 90 days or less of the date created, the system will also create an Advertisement document.
- The Document tab within the Statewide Service screen shall contain the Advertisement / RFP document template and, if applicable, the Advertisement document for that Statewide Service.

7.6.1 Edit Document

Edit Document (KYTC PSA and Central Office – Project Manager):

- Selection of the "Edit" option next to a document within the "Documents" tab shall open the document within the SharePoint application.
- Document updates made shall be saved within SharePoint.



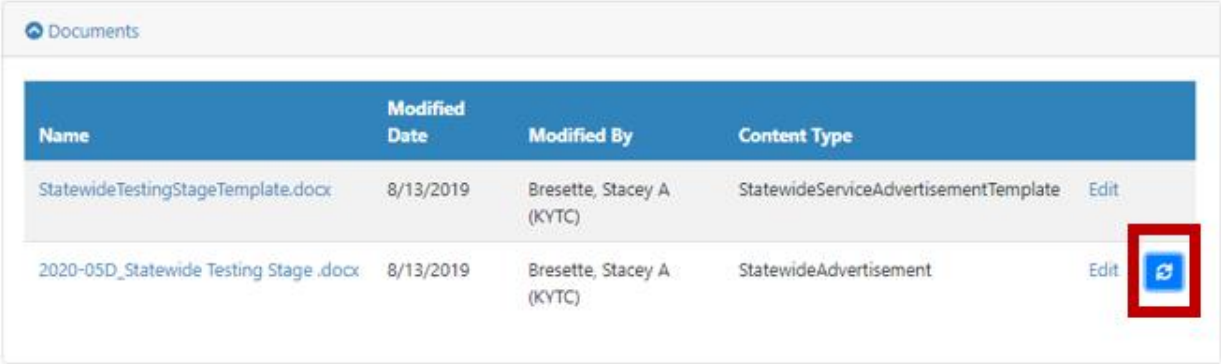
7.6.2 Regenerate Statewide Service Advertisement Document Template

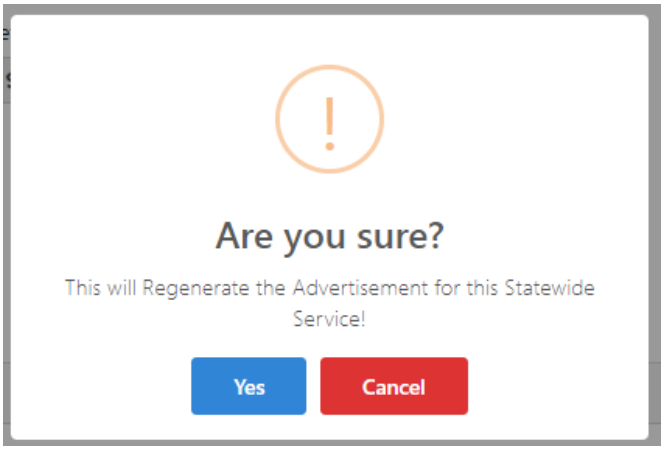
Regenerate Statewide Service Advertisement Document Template (KYTC PSA and Central Office – Project Manager):

- If changes are made to the base Statewide Service, the user may select the "Regenerate" option next to update the Advertisement / RFP document template for that Statewide Service.
- Selection of the "Regenerate" option shall display the "Are you sure? – This will Regenerate the Advertisement for this Statewide Service!" pop-up window.
    - Selection of the "Yes" option shall regenerate the Advertisement / RFP document template for that Statewide Service.

- All subsequent Advertisement / RFP documents created by the PSR2 application shall reflect the new template.

- Selection of the "Cancel" option shall NOT regenerate the Advertisement / RFP document template for that Statewide Service.

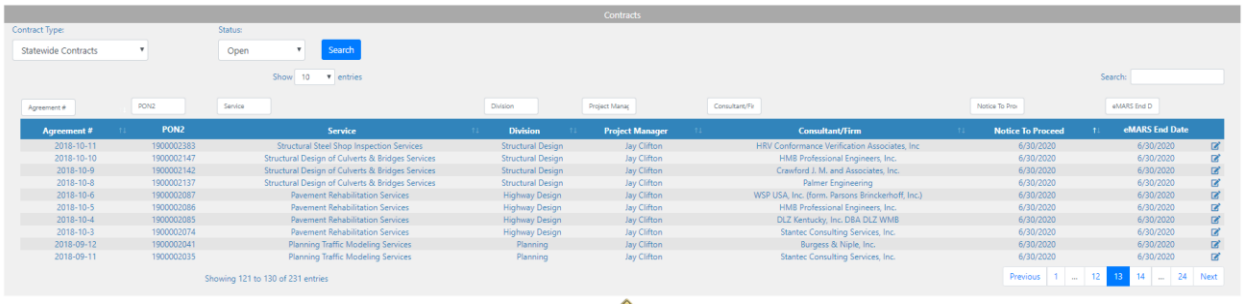




8 Statewide Service Contract Screens

Statewide Contract details are viewed by selecting the desired contract within the "Statewide Contracts" grid. Each individual Statewide Contract screen shall display the following:

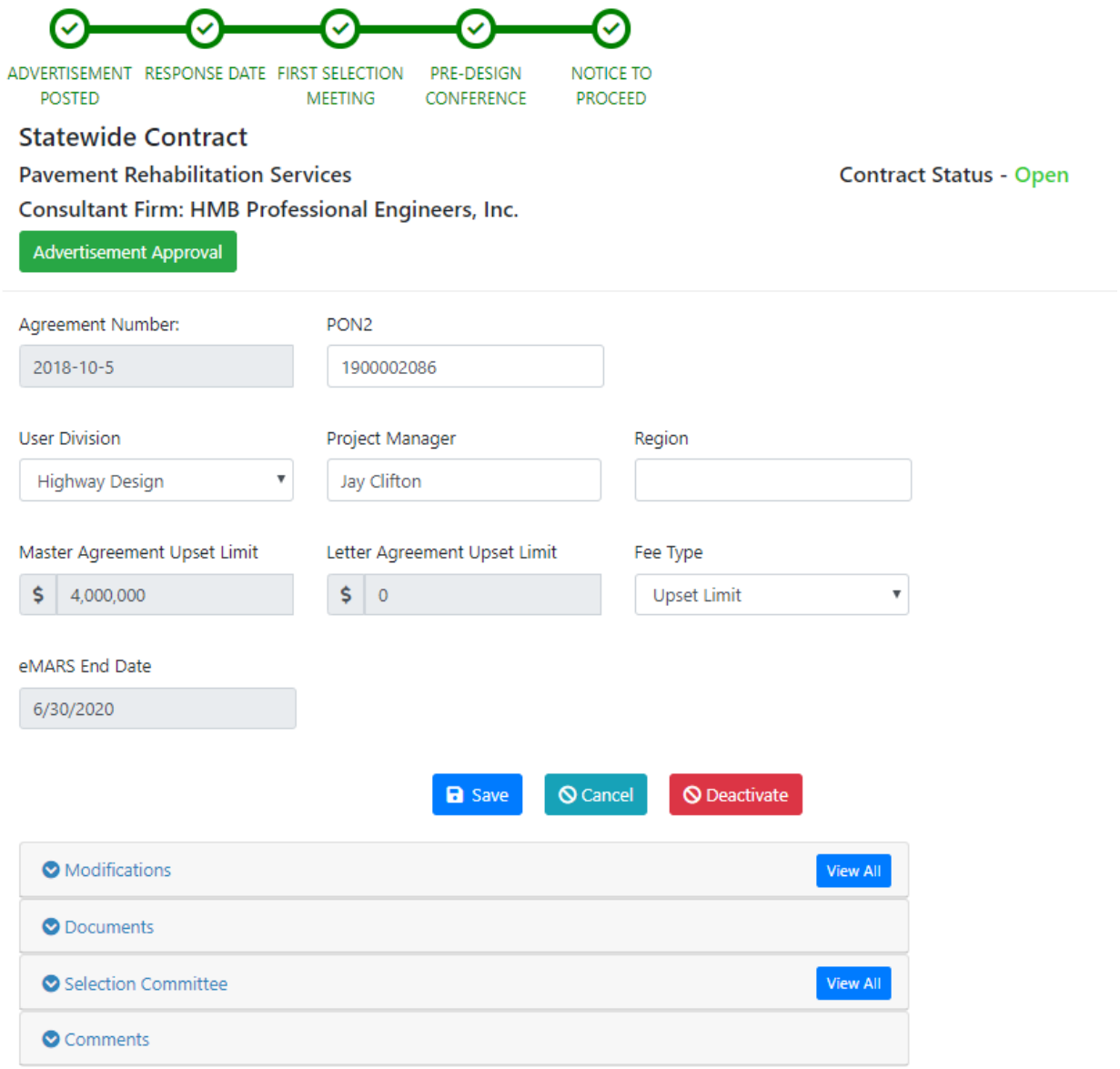
- Statewide Contract details
- Milestone Progress Bar
- Schedule
- Modifications tab
- Documents tab
- Selection Committee tab
- Comments tab



8.1 View / Edit Statewide Contracts

View / Edit Statewide Contracts:

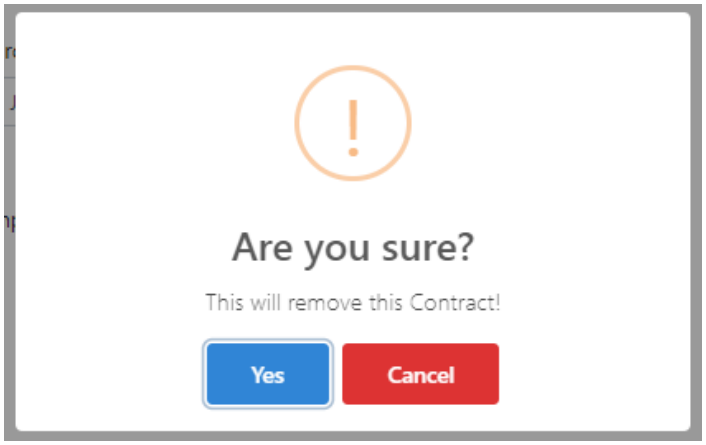
- All KYTC users (PSA, Central – Project Manager, District - Branch Manager, District – Project Manager, Location Engineer, User Division Director and Read Only roles) shall be able to view all Statewide Contracts.
- Only the KYTC – PSA role shall be able to edit a Statewide Contract.
- Statewide Contract fields shall be locked after the Prime Consultant has been selected for the contract.
- Master Agreement Upset Limit and Letter Agreement Upset Limit fields shall NOT be editable after the “Notice to Proceed” Schedule Event is completed.
- Upon selection of the “Save” option, the edits made to the Statewide Contract shall be saved to the PSR2 application.
- Upon selection of the “Cancel” option, edits made to the Statewide Contract shall NOT be saved to the PSR2 application.



8.2 Deactivate Statewide Contract

Deactivate Statewide Contract (KYTC – PSA):

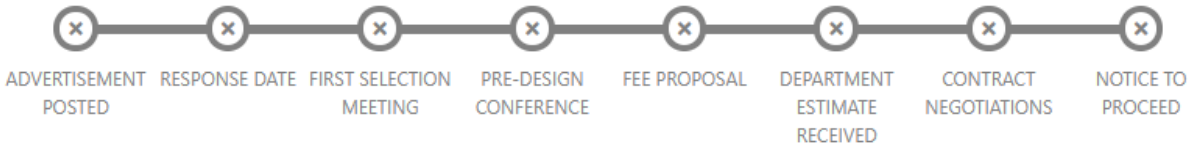
- The KYTC – PSA role shall be able to see a “Deactivate” option within the Statewide Contract screen.
- Selection of the “Deactivate” option shall display the “Are you sure? – This will remove this Contract!” pop-up window.
    - Upon selection of the “Save” option, the Statewide Contract shall be removed from the PSR2 application.
    - Upon selection of the “Cancel” option, Statewide Contract shall NOT be removed from the PSR2 application.



8.3 Statewide Contract - Milestone Progress Bar

Statewide Contract - Milestone Progress Bar:

The Milestone Progress Bar displays along the top of the Statewide Services Contract screen. The Milestones depicts when key contract events are completed (e.g. Response Date, Fee Proposal, Notice to Proceed, etc.)



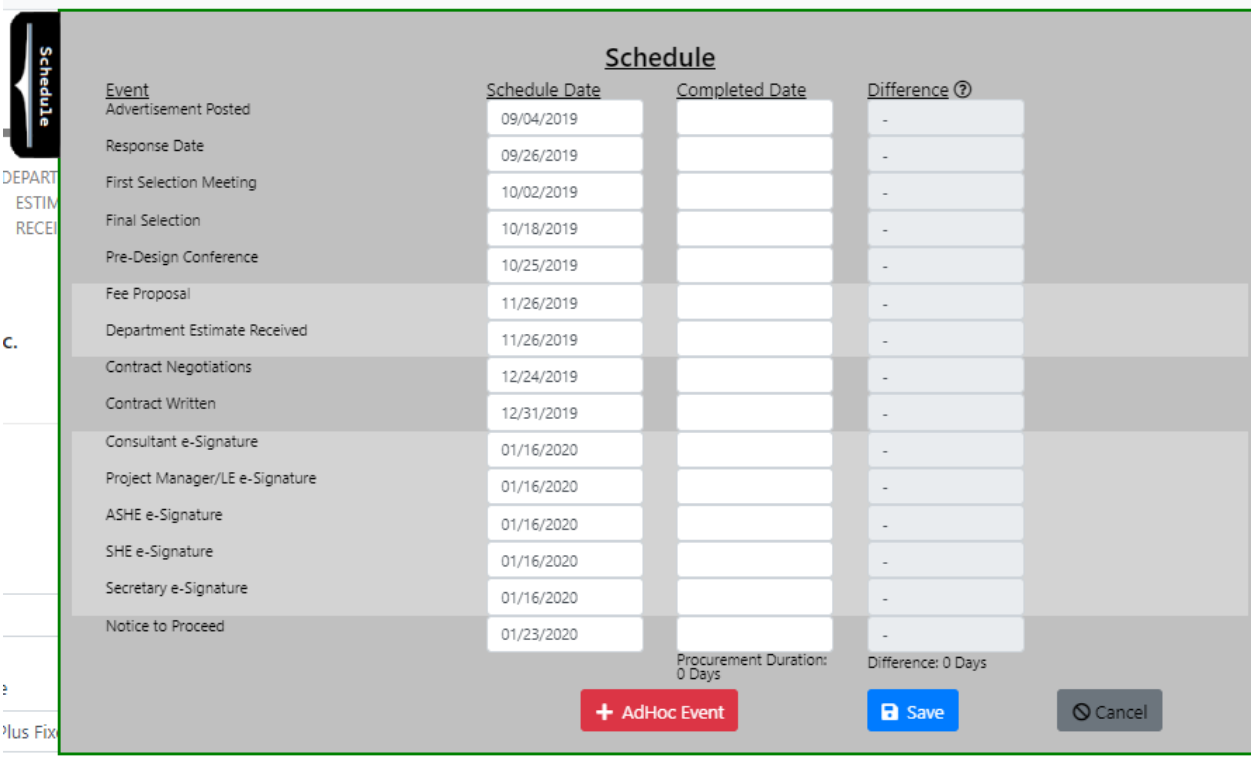
8.4 Statewide Contract - Schedule

Schedule:

The Schedule displays along the right side of the Statewide Contract screen. Selection of the “Schedule tab” shall display the Schedule fly-out.

The Schedule displays the Event Dates for each contract based on offset work days or the number of days expected to complete a given contract event. For example, once the “Response Date” event is completed, the “First Selection” event should be completed within 6 days after, etc.

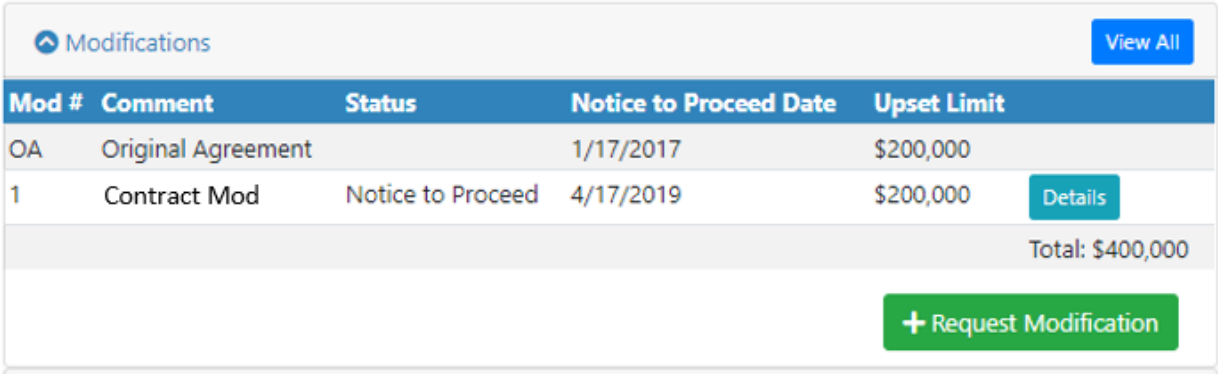
The Schedule also displays the “Completed Date” for each event and the “Difference”, or the days ahead of or behind the scheduled event due date.



8.5 Statewide Contracts – Modifications Tab

Modifications Tab:

The Modifications Tab displays a grid of all the Contract Modifications for a given Statewide contract. Users may also request a Contract Modification from this tab or view details of an existing Modification.



8.6 Statewide Contract – Documents Tab

Documents Tab:

The Documents Tab displays applicable documents for each Statewide Contract (e.g. Advertisement / RFP, Contract, Notice to Proceed, etc.). Users may upload, edit and delete documents based on their user role.

8.7 Statewide Contracts – Selection Committee

Selection Committee:

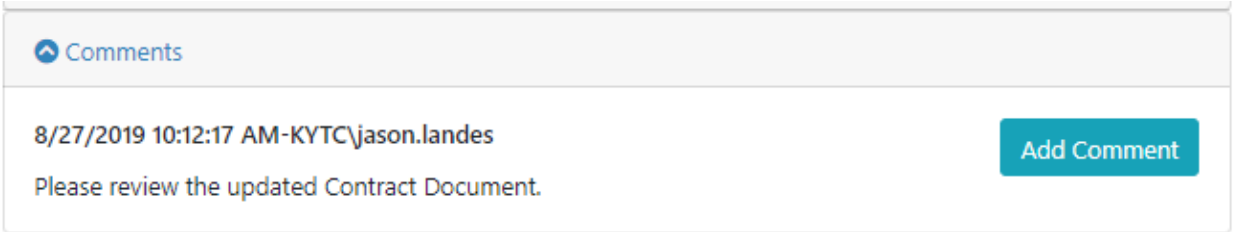
The Selection Committee Tab displays the following:

- Selection Committee Pool members
  - 1 Governor's Pool member (non-KYTC)
  - 2 Secretary's Pool members (Professional Engineers)
  - 2 User Division Pool members (normally KYTC Project Managers)
- KYTC Project Manager
- Prime Consultant Firm Name
- Consultant Project Manager

8.8 Statewide Contracts – Comments Tab

Comments Tab:

The Comments Tab allows users to add Comments or reminders related to the Statewide Contract.



9 Advertisement Approval – Statewide Services

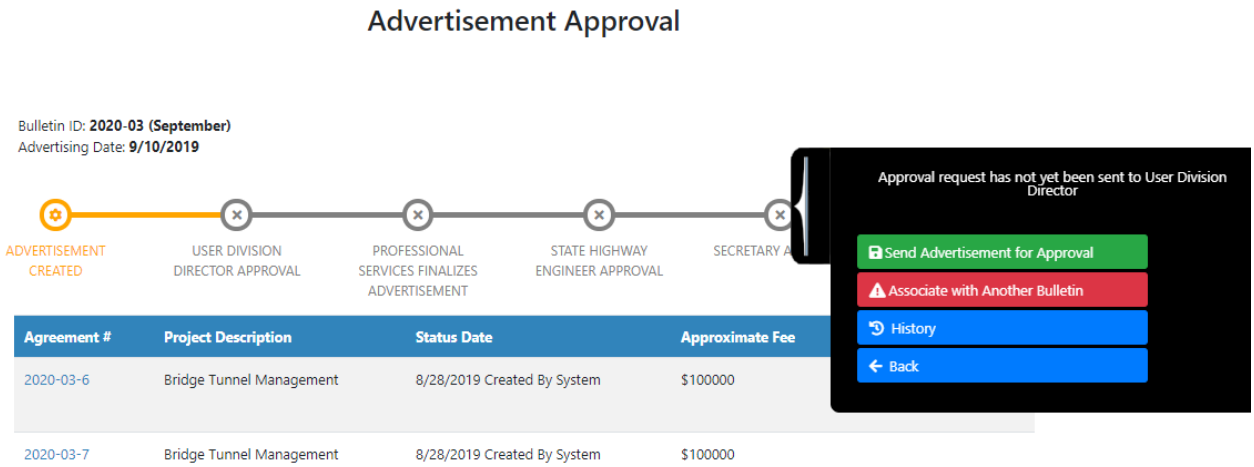
The monthly Procurement Bulletin will contain one or many Advertisements / RFPs containing both Project Specific and Statewide projects. Each individual Advertisement is reviewed and approved by KYTC before being packaged into the monthly Bulletin. Once packaged, the Bulletin is posted to the Professional Services website (indicated by a Bulletin ID).

Prior to Bulletin posting, a Statewide Services Advertisement requires a series of KYTC approvals. Each approval step shall be initiated within the PSR2 application. KYTC users are notified of pending approval requests via email notifications. Each email notification contains information related to the Advertisement and links that navigate the user to the appropriate Advertisement Approval page based on their user role.

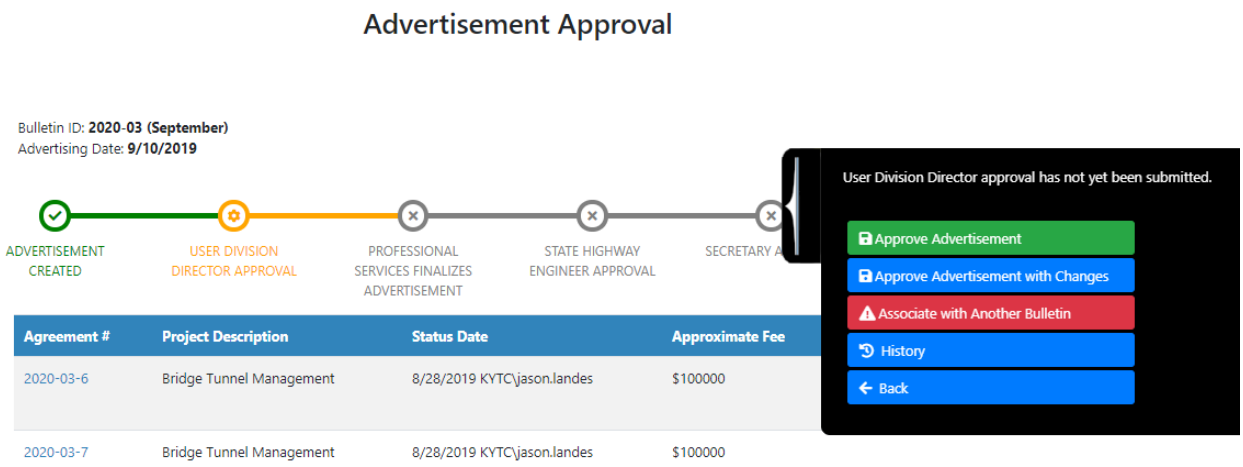
In most instances, a KYTC Central Office Project Manager will initiate the internal KYTC Advertisement approval process. However, there will be instances that the KYTC PSA or PS Director roles will need to create an Advertisement and expedite its approval to include as part of the monthly Procurement Bulletin.

The KYTC Statewide Advertisement approval process contains the following steps (i.e. Happy Path):

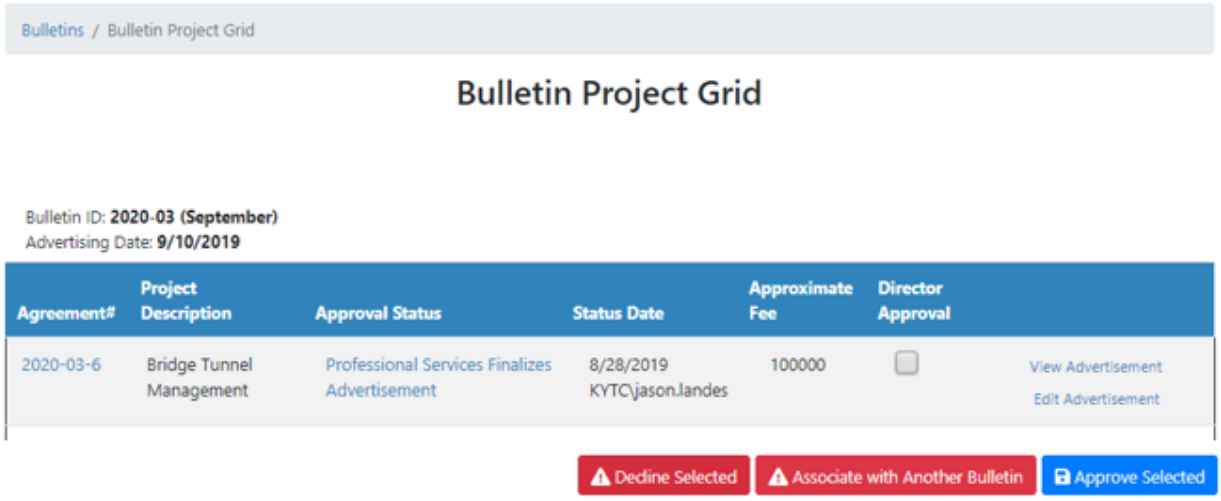
- KYTC Project Manager selects the “Advertisement Approval” option within the Statewide Contract screen that navigates them to the “Advertisement Approval” screen.
    - KYTC Project Manager initiates the approval process by selecting the “Send Advertisement for Approval” fly-out option within the “Advertisement Approval” screen.
        - PSR2 system sends an email approval request to the KYTC User Division Director (UDD) for that contract.



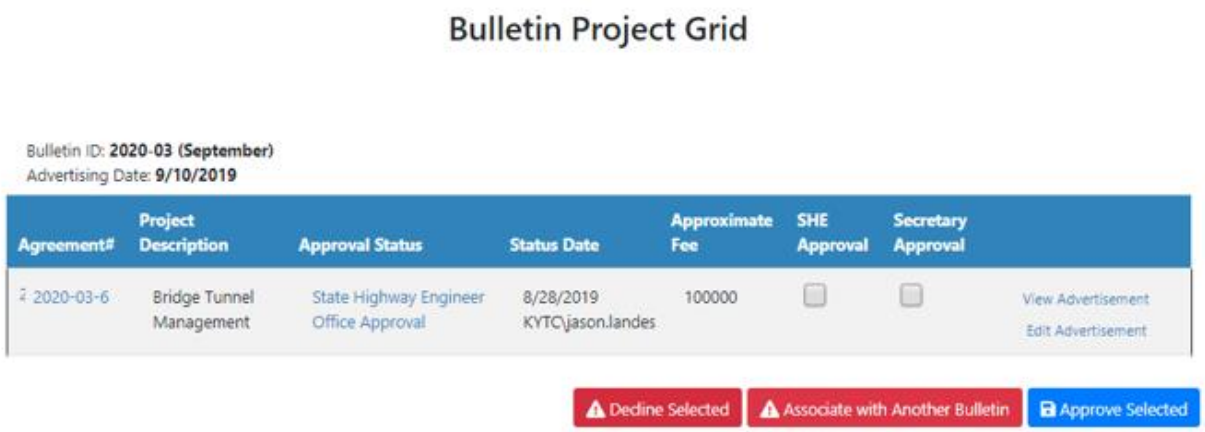
- Upon receipt of the email approval request, the KYTC User Division Director (UDD) selects a link that navigates them to the appropriate "Advertisement Approval" screen.
    - KYTC User Division Director (UDD) may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC User Division Director (UDD) selects the "Approve Advertisement" fly-out option within the "Advertisement Approval" screen.
    - PSR2 system sends an email approval request to the KYTC Professional Services Director.



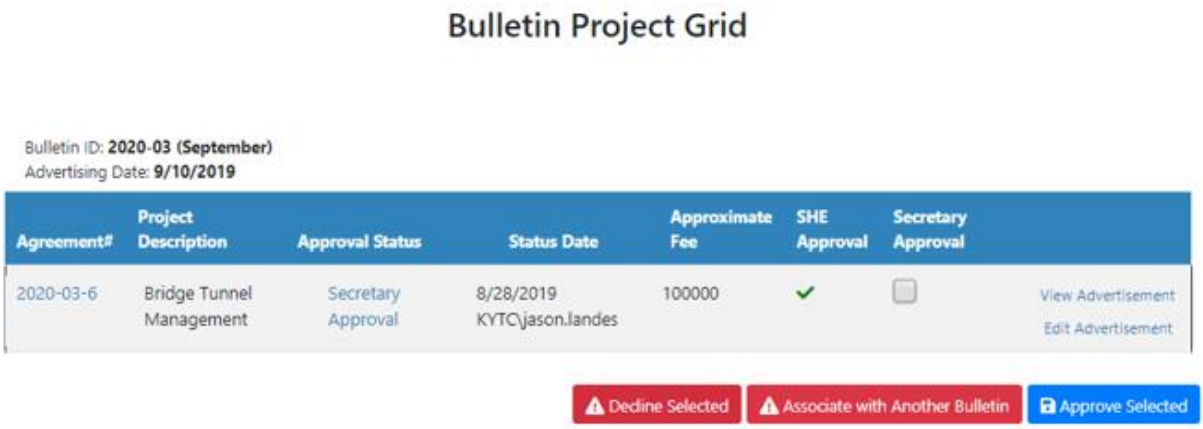
- Upon receipt of the email approval request, the KYTC Professional Services Director selects a link that navigates them to the "Bulletin Grid" screen.
    - KYTC Professional Services Director may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC Professional Services Director selects the "Director Approval" option within the within the "Bulletin Grid" screen and then the "Approve Selected" option.
    - PSR2 system sends an email approval request to the KYTC State Highway Engineer (SHE) and KYTC Secretary offices.



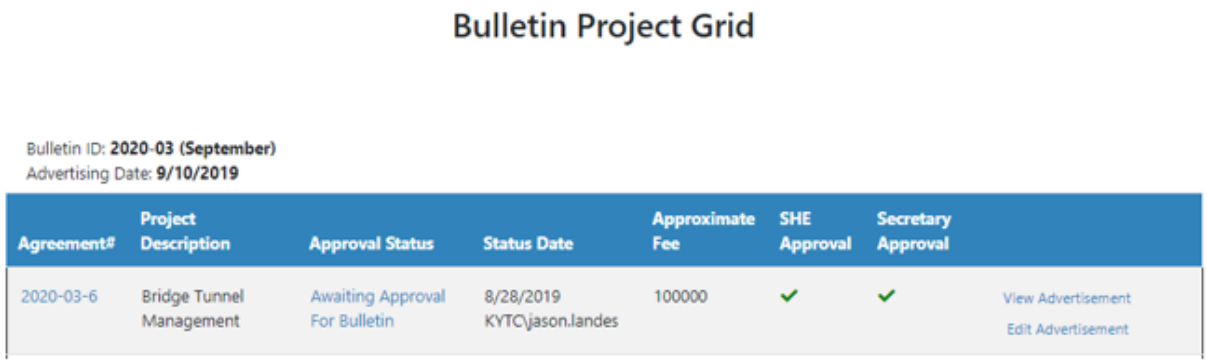
- Upon receipt of the email approval request, the KYTC State Highway Engineer (SHE) selects a link that navigates them to the "Bulletin Grid" screen.
    - KYTC State Highway Engineer (SHE) may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC State Highway Engineer (SHE) selects the "SHE Approval" option within the within the "Bulletin Grid" screen and then the "Approve Selected" option.
    - PSR2 system sends an approval email to the KYTC Professional Services Director.
        - Note: This step may be concurrent with the "Secretary" approval step.



- Upon receipt of the email approval request, the KYTC Secretary selects a link that navigates them to the "Bulletin Grid" screen.
    - KYTC Secretary may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC Secretary selects the "Secretary Approval" option within the within the "Bulletin Grid" screen and then the "Approve Selected" option.
    - PSR2 system sends an approval email to the KYTC Professional Services Director.
        - Note: This step may be concurrent with the "SHE" approval step.



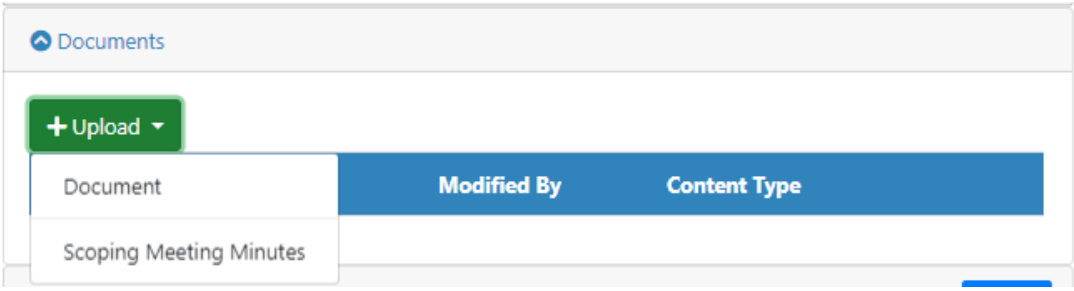
- Upon approval from both the KYTC SHE and Secretary Offices, the KYTC Professional Services group will package all of the approved Advertisements for that month into the Bulletin.
- KYTC Professional Services group will post the Procurement Bulletin to the Professional Services website on the Advertisement Date.



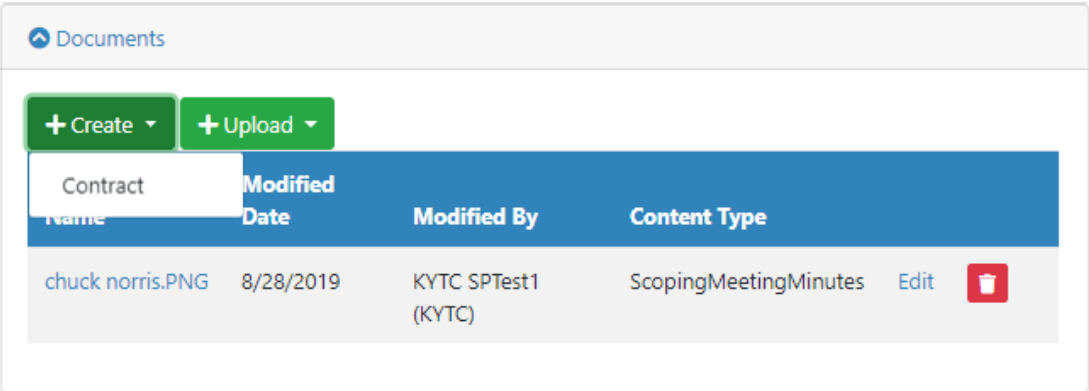
10 Create Statewide Contract Document

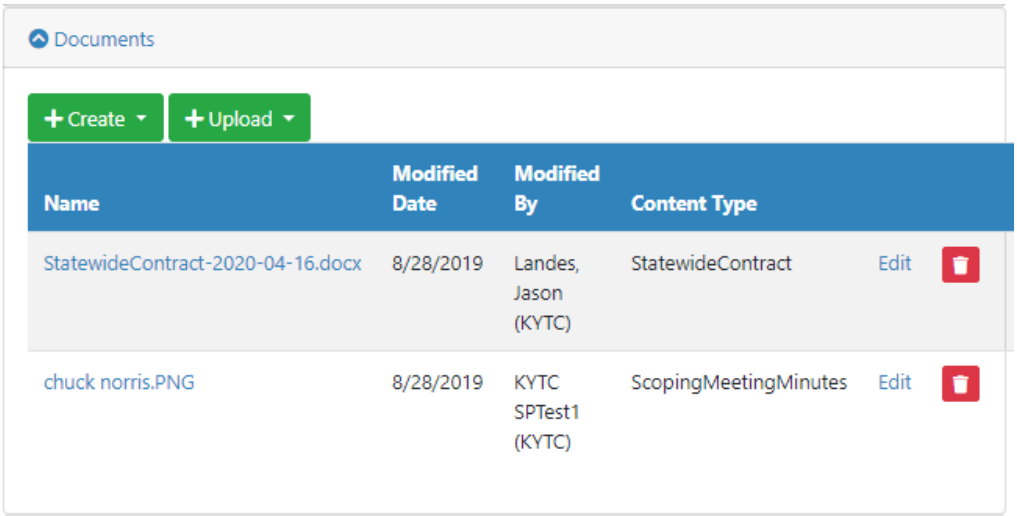
Once the KYTC Selection Committee has selected Prime Consultant for a Statewide Contract, the Primary Consultant shall be able to view the contract within the Contracts grid on the Dashboard. Upon selection of the Statewide Contract within the grid, the user shall be navigated to the Statewide Contract screen.

The Prime Consultant Project Manager shall be able to upload their “Scoping Meeting Minutes” document via the “+ Upload” option within the “Documents” tab.



Upon upload of the "Scoping Meeting Minutes" document, the Primary Consultant Project Manager shall be able to generate the Statewide Contract document via the "+ Create" option within the "Documents" tab.





11 Statewide Contract Document Approval

This release of the Professional Services application will feature a manual Statewide Contract document Approval process that will occur mostly outside of the application. Please note that a future release of the Professional Services application will feature a more automated Statewide document approval process with an application interface, email notifications, etc.

11.1 Approve Draft Statewide Contract Document

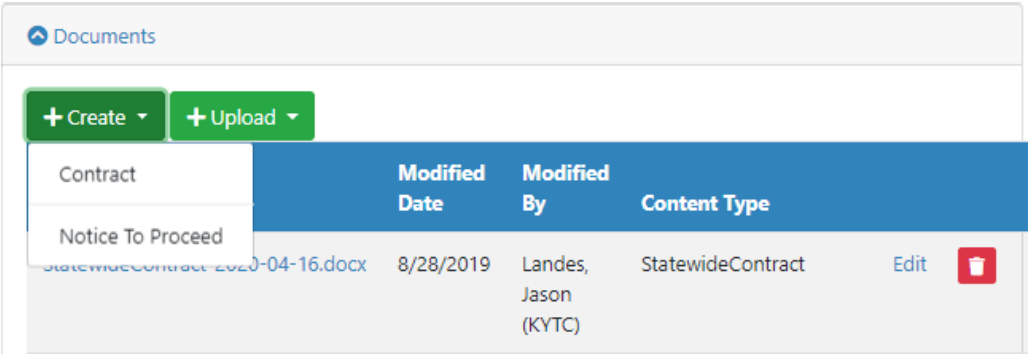
Statewide Contract Document Approval – Approve Draft Contract (Primary Consultant PM and Internal KYTC):

- Upon creation of the draft Statewide Contract document, the Primary Consultant Project Manager will notify the Professional Services group that the Contract document is ready for review.
- The KYTC Professional Service Admin reviews and approves the draft Statewide Contract document and sends email approval requests to the following:
    - Primary Consultant Project Manager
    - KYTC Assistant State Highway Engineer (ASHE)
    - KYTC State Highway Engineer (SHE)
    - KYTC Secretary
- Primary Consultant Project Manager shall approve / approve with revisions / decline draft Statewide Contract document.
- KYTC ASHE shall approve / approve with revisions / decline draft Statewide Contract document.
- KYTC SHE shall approve / approve with revisions / decline draft Statewide Contract document.
- KYTC Secretary shall approve / approve with revisions / decline draft Statewide Contract document.
- Once draft Statewide Contract document approvals are received, the KYTC Professional Services Admin shall send an email notification to the Prime Consultant Project Manager and KYTC Project Manager indicating that the Statewide Contract document is approved.

11.2 Create Draft Notice to Proceed Document

Statewide Contract Document Approval – Create Draft Notice to Proceed (KYTC Professional Services Admin):

- The KYTC Professional Services Admin shall select the “Notice to Proceed” option from the “Documents” tab to generate the draft Notice to Proceed document.
- The KYTC Professional Services Admin shall send an email notification to the KYTC Professional Services Director to review the Notice to Proceed document.



11.3 Approve Draft Notice to Proceed Document

Statewide Contract Document Approval – Approve Notice to Proceed (KYTC Professional Services Director):

- The KYTC Professional Services Director shall review / approve the Notice to Proceed draft document.
- Upon approval of the Notice to Proceed document, the KYTC Professional Services Director shall send an email notification to the Primary Consultant Project Manager, KYTC Project Manager, KYTC Location Engineer and KYTC Professional Services Admin.

12 Statewide Contract Modifications

When the Primary Consultant or KYTC determines that a Statewide Contract requires a fee increase (or decrease), a schedule adjustment or both, a Contract Modification shall be requested.

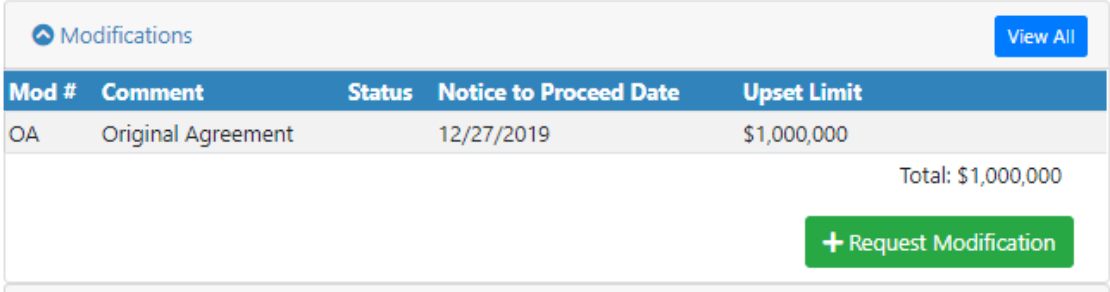
12.1 Statewide Contract Modification – Time Extension Only

A Statewide Contract Modification with Time Extension Only is requested when additional time is required to complete the work.

12.1.1 Request Statewide Contract Modification – Time Extension Only

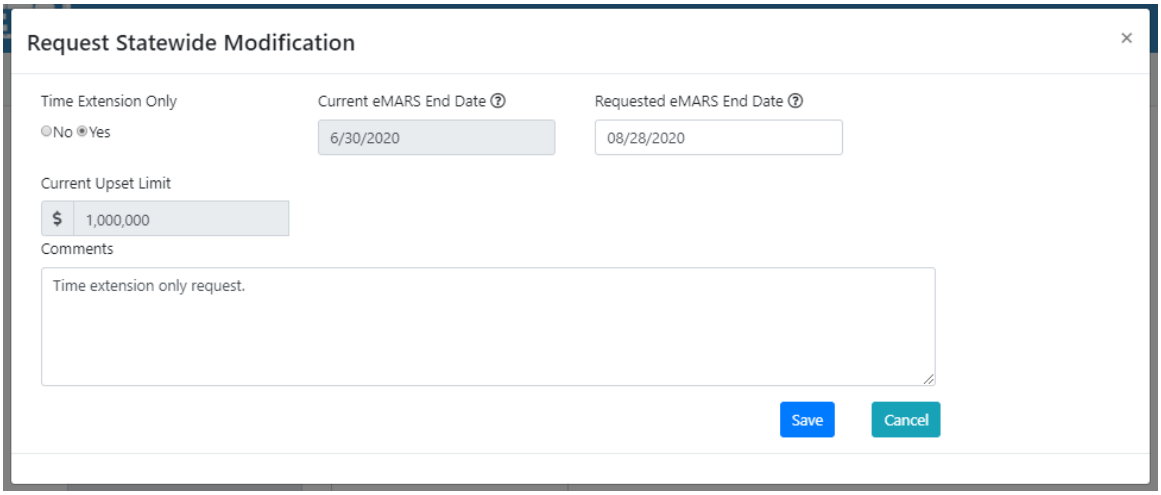
Request Statewide Contract Modification – Time Extension Only (Primary Consultant Project Manager:

- The Primary Consultant Project Manager can begin the process of requesting a Statewide Contract Modification by selecting the "+ Request Modification" option within the Statewide Contract's "Modifications" tab.
    - Note: The KYTC Project Manager or KYTC Professional Service Admin may also request a Modification as needed.
- Selection of the "+ Request Modification" option shall display the "Request Statewide Modification" pop-up window.



- The user is required to enter the following fields:
    - Time Extension Only

        - Toggle to “Yes” indicates a Time Extension Only Modification
    - Requested eMARS End Date
        - The Calendar shall default to +12 months from the current date of request.
    - Comments
- Selection of the “Save” option shall save the Contract Modification to the PSR2 application.
- Selection of the “Cancel” option shall NOT save the Contract Modification to the PSR2 application.



12.1.2 Statewide Contract Modification – Time Extension Only Screen

- Upon selection of the “Save” option, the user shall be navigated to the Statewide Contract Modification – Time Extension Only screen.
- Each individual Statewide Contract Modification screen shall display the following:
    - Statewide Contract Modification – Time Extension Only details
    - Milestone Progress Bar
    - Schedule
    - Documents tab
- User may update the following fields as needed:
    - Comments
    - Requested eMARS End Date
    - Consultant Project Manager
- Selection of the “Save” option shall save the Contract Modification to the PSR2 application.
- Selection of the “Cancel” option shall NOT save the Contract Modification to the PSR2 application.

Tunnel Bridge / Statewide Contract Modification

FEE PROPOSAL | CONTRACT WRITTEN | CONSULTANT E-SIGNATURE | PROJECT MANAGER/LE E-SIGNATURE | PROFESSIONAL SERVICES DIRECTOR E-SIGNATURE | NOTICE TO PROCEED

Statewide Contract Modification - 1

Tunnel Bridge

Consultant Firm: Strand Associates, Inc. c/o PEH

Agreement Number: 2020-04-16

PON2:

Comments

Time Extension Only:

Current eMARS End Date: 6/30/2020

Requested eMARS End Date: 08/28/2020

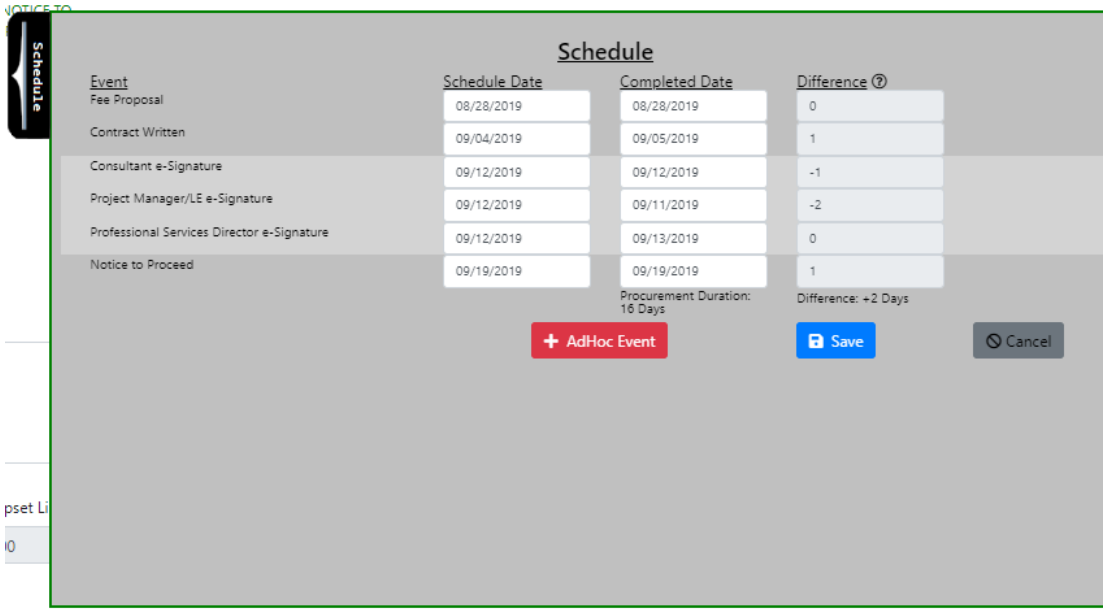
Current Upset Limit: 1,000,000

Prime Consultant: Strand Associates, Inc. c/o PEH

Consultant Project Manager: Calvin Broadus

Save Cancel

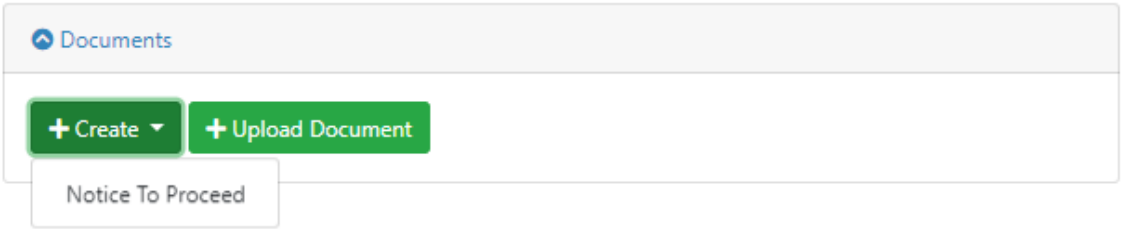
Documents

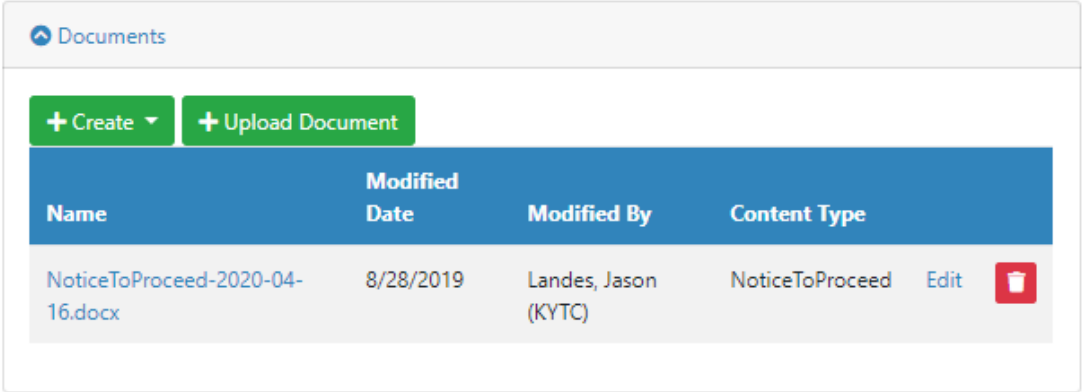


12.1.3 Create Draft Notice to Proceed Document

Create Draft Notice to Proceed (PSA):

- Once the requested Contract Modification has been approved, the draft Notice to Proceed document shall be created.
- The KYTC Professional Services Admin shall select the "Notice to Proceed" option from the "Documents" tab to generate the draft Notice to Proceed document.
- The KYTC Professional Services Admin shall send an email notification to the Professional Services Director requesting that they review the Notice to Proceed document.





12.1.4 Approve Draft Notice to Proceed Document

Approve Draft Notice to Proceed Document (PS Director):

- The KYTC Professional Services Director shall review / approve the draft Notice to Proceed document.
- Upon approval of the Notice to Proceed document, the Professional Services Director shall send an email notification to the following:
    - Primary Consultant Project Manager
    - KYTC Project Manager
    - KYTC Location Engineer
    - Professional Services Admin

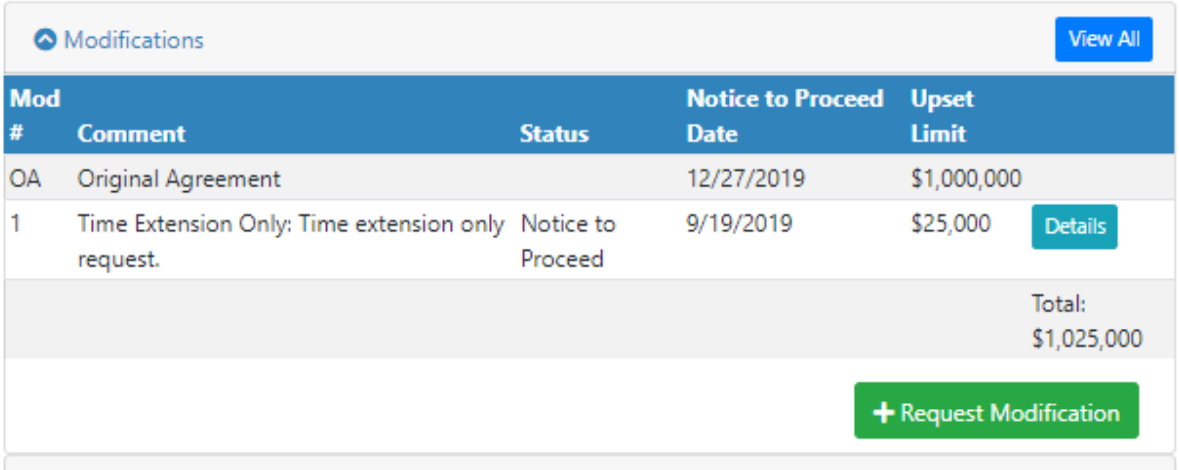
12.2 Statewide Contract Modification with Fee

A Statewide Contract Modification with Fee can be requested when a fee increase (or decrease) is required. Additional time may also be requested in this type of Modification.

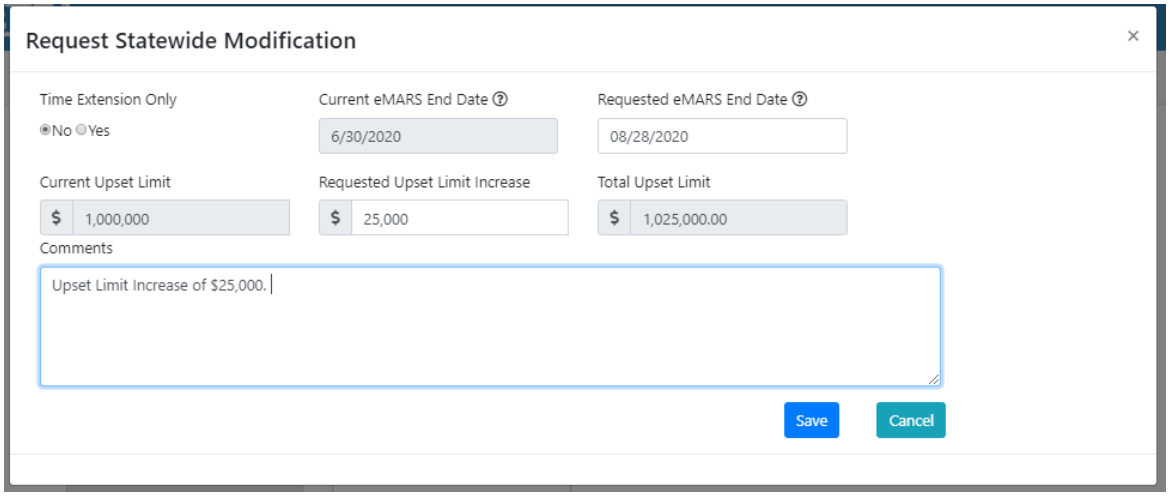
12.2.1 Request Statewide Contract Modification with Fee

Request Statewide Contract Modification with Fee (Primary Consultant Project Manager:

- The Primary Consultant Project Manager can begin the process of requesting a Statewide Contract Modification by selecting the "+ Request Modification" option within the Statewide Contract's "Modifications" tab.
    - Note: The KYTC Project Manager or KYTC Professional Service Admin may also request a Modification as needed.
- Selection of the "+ Request Modification" option shall display the "Request Statewide Modification" pop-up window.



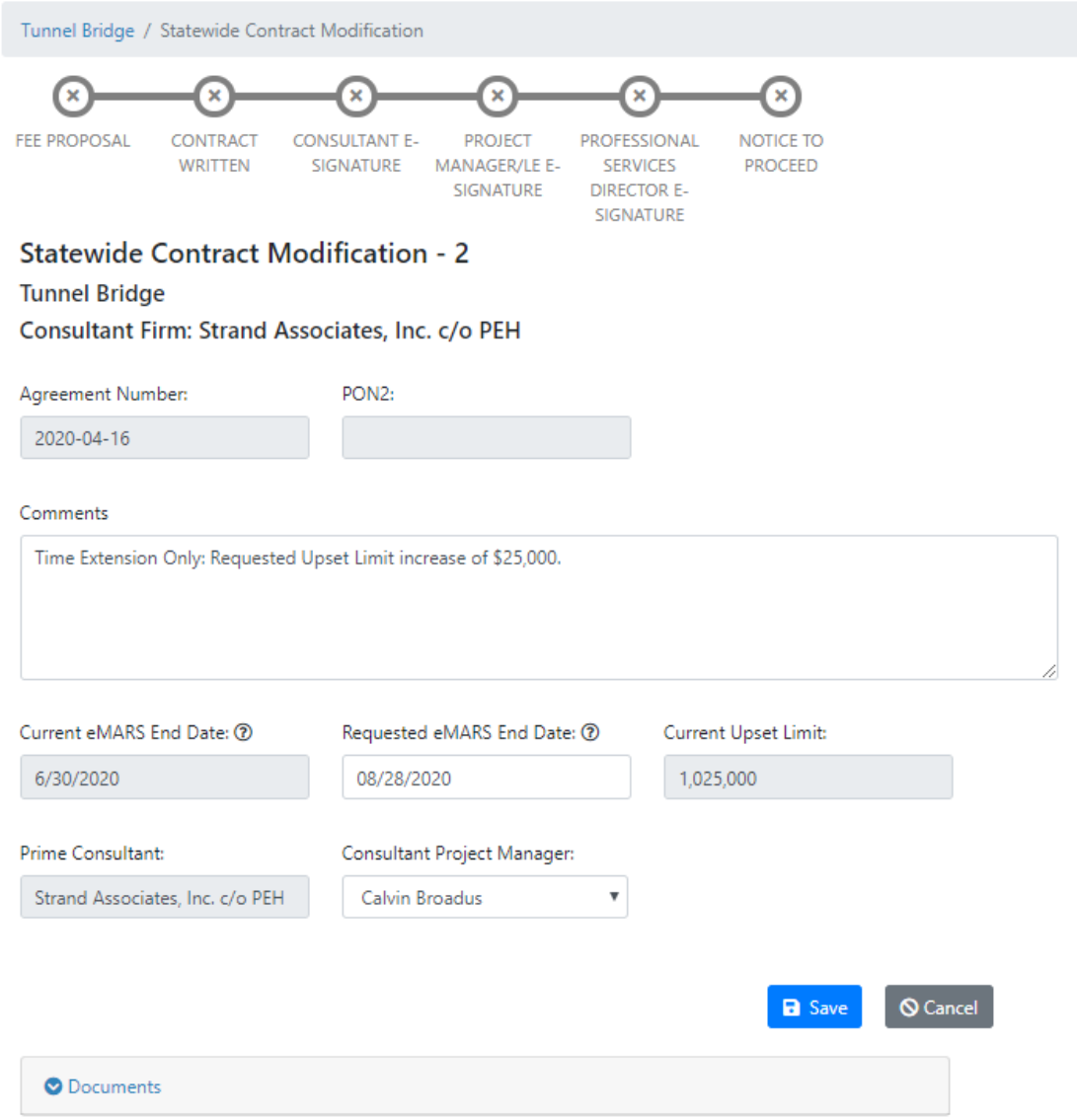
- The user is required to enter the following fields:
  - Time Extension Only
    - Toggle to "No" indicates a Modification with Fee
    - Note: A Modification with Fee may also include a Time Extension request.
  - Requested eMARS End Date
    - The Calendar shall default to +12 months from the current date of request.
  - Requested Upset Limit Increase
    - Value entered into this field shall increase / decrease the value in the "Total Upset Limit" field.
  - Comments
- Selection of the "Save" option shall save the Contract Modification to the PSR2 application.
- Selection of the "Cancel" option shall NOT save the Contract Modification to the PSR2 application.

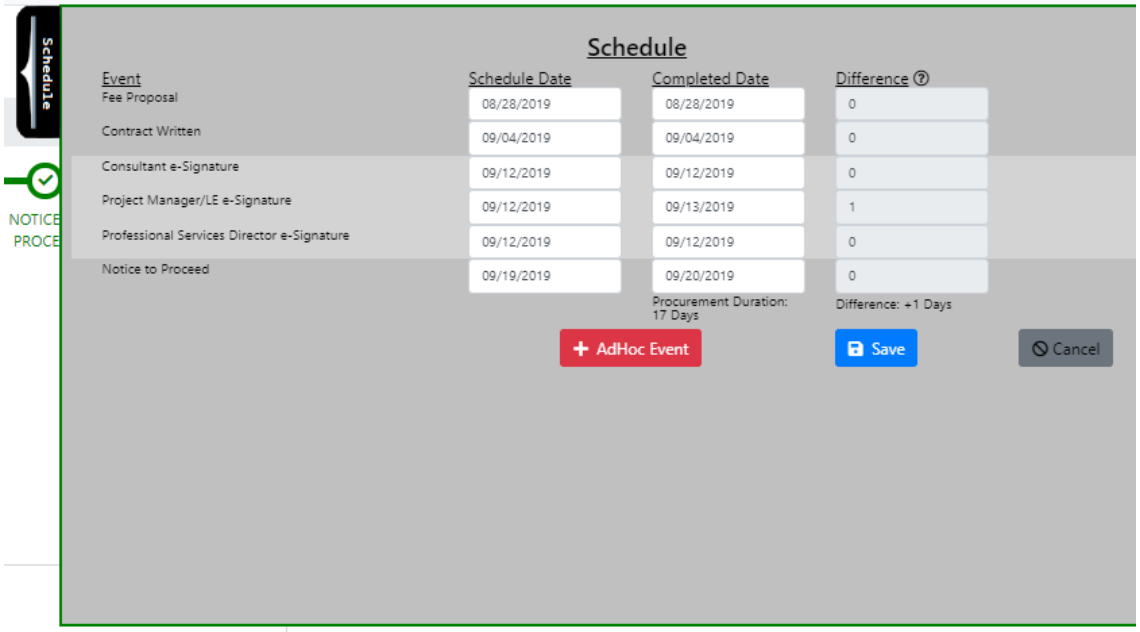


12.2.2 Statewide Contract Modification with Fee Screen

- Upon selection of the "Save" option, the user shall be navigated to the Statewide Contract Modification with Fee screen.
- Each individual Statewide Contract Modification screen shall display the following:

  - Statewide Contract Modification with Fee details
  - Milestone Progress Bar
  - Schedule
  - Documents tab
- User may update the following fields as needed:
  - Comments
  - Requested eMARS End Date
  - Consultant Project Manager
- Selection of the "Save" option shall save the Contract Modification to the PSR2 application.
- Selection of the "Cancel" option shall NOT save the Contract Modification to the PSR2 application.

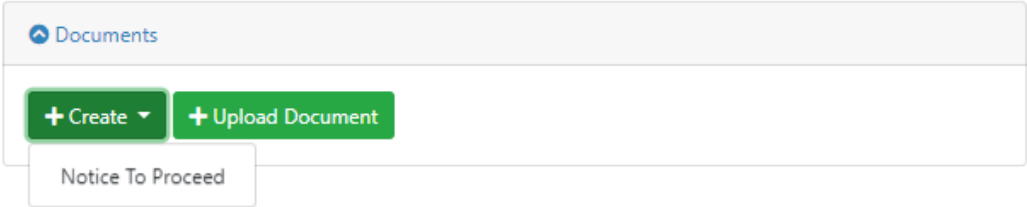


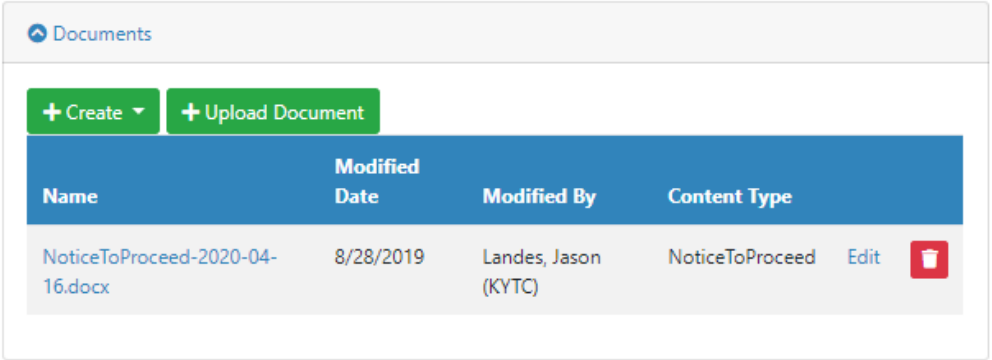


12.2.3 Create Draft Notice to Proceed Document

Create Draft Notice to Proceed (PSA):

- Once the requested Contract Modification has been approved by the KYTC Professional Services group, the draft "Notice to Proceed" document shall be created.
- The KYTC Professional Services Admin shall select the "Notice to Proceed" option from the "Documents" tab to generate the draft Notice to Proceed document.
- The KYTC Professional Services Admin shall send an email notification to the Professional Services Director requesting that they review the Notice to Proceed document.





12.2.4 Approve Draft Notice to Proceed Document

Approve Draft Notice to Proceed Document (PS Director):

- The KYTC Professional Services Director shall review / approve the draft Notice to Proceed document.
- Upon approval of the Notice to Proceed document, the Professional Services Director shall send an email notification to the Primary Consultant Project Manager, KYTC Project Manager, KYTC Location Engineer and Professional Services Admin.

13 Create Project Specific Contract Widget

Professional Services is the Division responsible for the selection of Consultant engineering firms contracted to provide design services for roadway and bridge projects (Project Specific contracts). Contracts can include multiple Projects, but a Project cannot have more than one Contract.

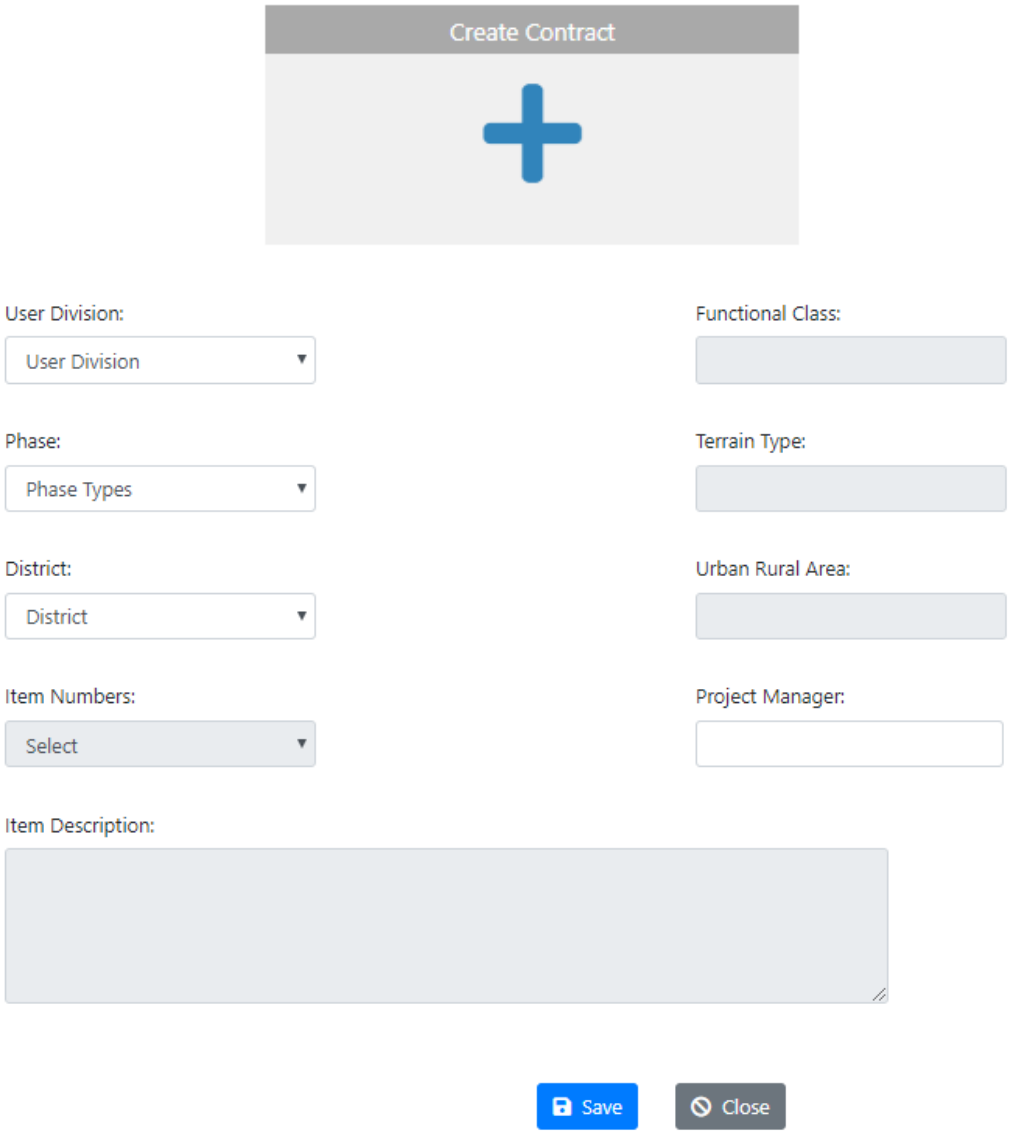
The "Create Contract" widget shall enable authenticated users the ability to create a Project Specific Contract.

The following roles shall have access to the "Create Contract" widget:

- KYTC PSA
- KYTC District Branch Manager
- KYTC District Project Manager
- KYTC Location Engineer

Select "Create Contract" widget:

- Selection of the "Create Contract" widget within the Dashboards hall navigate the user to the "Create Contract" screen.



Create Project Specific Contract:

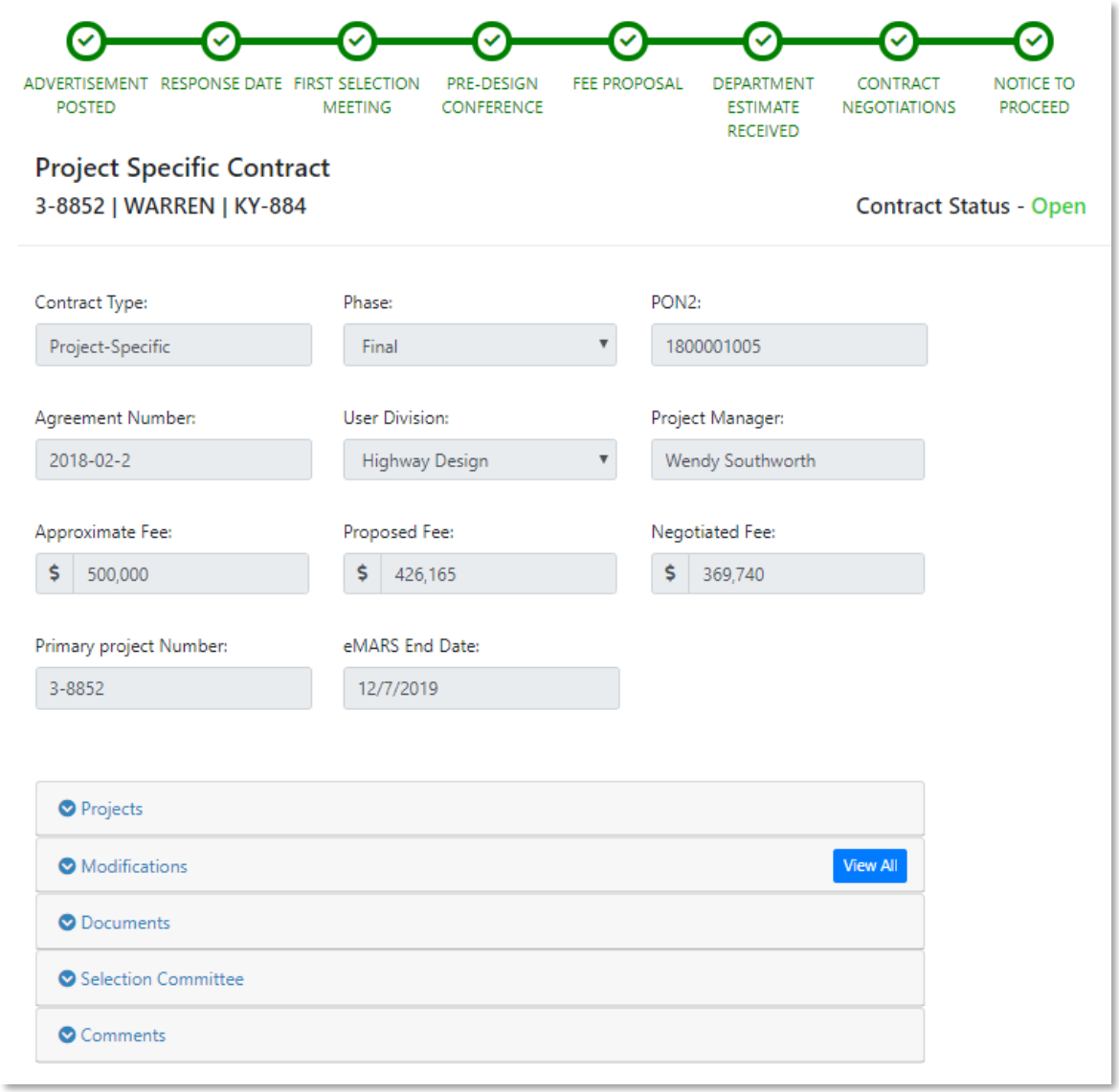
- Selection of the "Create Contract" widget within the Dashboard shall navigate the user to the "Add Project Specific Contract" screen.
- User shall be able to enter the following:
  - User Division
  - Phase
  - District
  - Item Numbers (populates with 6YP data based on "District" value entry)
  - Item Description (populates with 6YP data based on "Item Number" entry)
  - Functional Class (populates with 6YP data based on "Item Number" entry)
  - Terrain Type (populates with 6YP data based on "Item Number" entry)
  - Urban Rural Area (populates with 6YP data based on "Item Number" entry)

  - Project Manager
- Selection of the “Save” option shall save the Project Specific Contract to the PSR2 application.
  - The newly created Project Specific Contract shall display in the “Contracts - Project Specific Contracts” grid within the Dashboard.
- Selection of the “Close” option shall NOT save the Project Specific Contract to the PSR2 application.

14 Project Specific Contracts

Project Specific Contract details can be viewed by selecting the desired contract within the “Project Specific Contracts” grid. Each individual Project Specific Contract screen shall display the following:

- Project Specific Contract details
- Milestone Progress Bar
- Event Schedule
- Projects tab
- Modifications tab
- Documents tab
- Selection Committee tab
- Comments tab



Milestone Progress Bar:

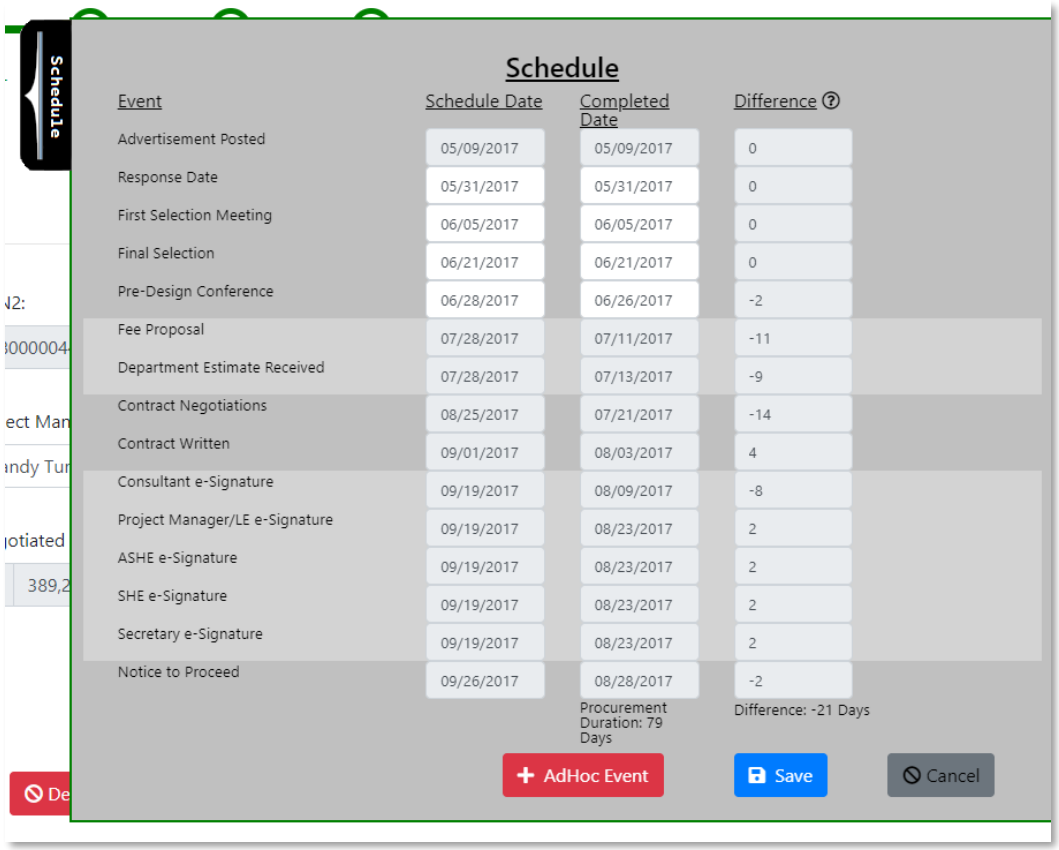
The Milestone Progress Bar displays along the top of the Statewide Services Contract screen. The Milestones depicts when key contract events are completed (e.g. Response Date, Fee Proposal, Notice to Proceed, etc.)

Schedule:

The Schedule displays along the right side of the Statewide Contract screen. Selection of the “Schedule tab” shall display the Schedule fly-out.

The Schedule displays the Event Dates for each contract based on offset work days or the number of days expected to complete a given contract event. For example, once the “Response Date” event is completed, the “First Selection” event should be completed within 6 days after, etc.

The Schedule also displays the “Completed Date” for each event and the “Difference” (or the days ahead of or behind schedule, each event is).



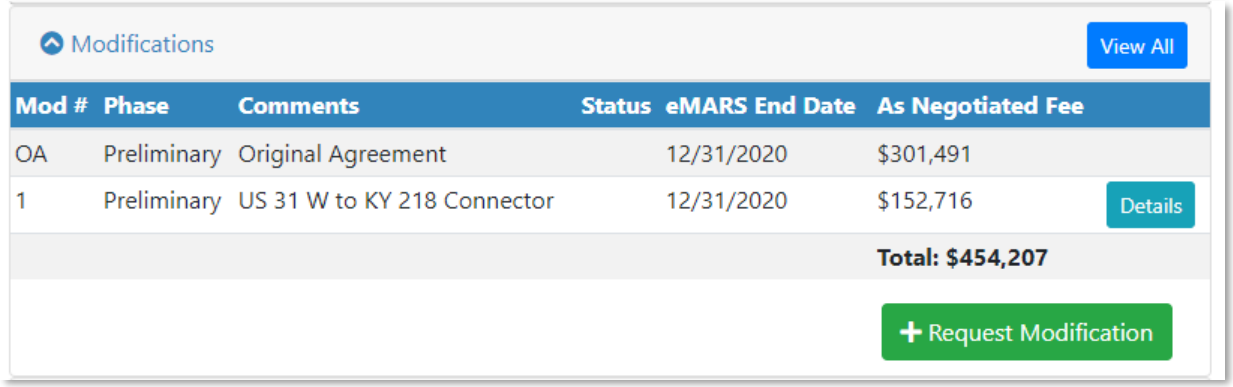
Schedule

Event	Schedule Date	Completed Date	Difference
Advertisement Posted	05/09/2017	05/09/2017	0
Response Date	05/31/2017	05/31/2017	0
First Selection Meeting	06/05/2017	06/05/2017	0
Final Selection	06/21/2017	06/21/2017	0
Pre-Design Conference	06/28/2017	06/26/2017	-2
Fee Proposal	07/28/2017	07/11/2017	-11
Department Estimate Received	07/28/2017	07/13/2017	-9
Contract Negotiations	08/25/2017	07/21/2017	-14
Contract Written	09/01/2017	08/03/2017	4
Consultant e-Signature	09/19/2017	08/09/2017	-8
Project Manager/LE e-Signature	09/19/2017	08/23/2017	2
ASHE e-Signature	09/19/2017	08/23/2017	2
SHE e-Signature	09/19/2017	08/23/2017	2
Secretary e-Signature	09/19/2017	08/23/2017	2
Notice to Proceed	09/26/2017	08/28/2017	-2
		Procurement Duration: 79 Days	Difference: -21 Days

AdHoc Event | Save | Cancel

Modifications Tab:

The Modifications Tab displays a grid of all the Contract Modifications for a given Statewide contract. Users may request a Contract Modification from this tab or view an existing Modification.



Modifications

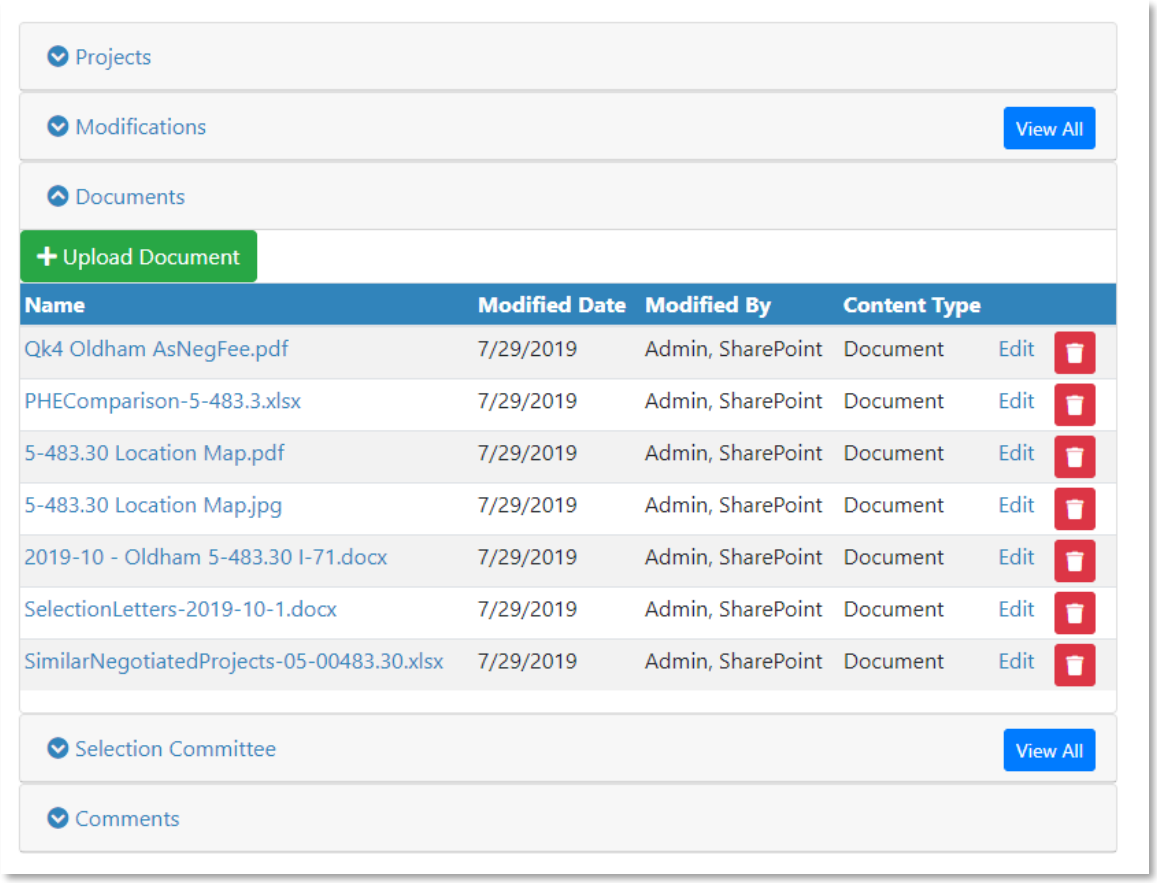
View All

Mod #	Phase	Comments	Status	eMARS End Date	As Negotiated Fee	
OA	Preliminary	Original Agreement		12/31/2020	$301,491	
1	Preliminary	US 31 W to KY 218 Connector		12/31/2020	$152,716	Details
					Total: $454,207	

Request Modification

Documents Tab:

The Documents Tab displays applicable documents for each Statewide Contract (e.g. Advertisement / RFP, Contract, Notice to Proceed, etc.). Users may upload, edit and delete documents based on their user role.



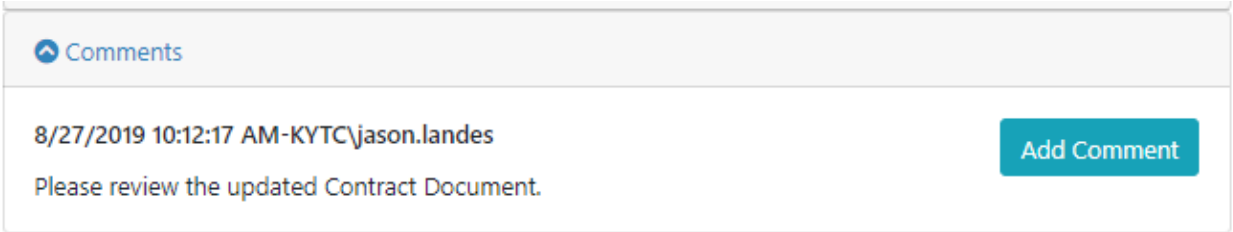
Selection Committee:

The Selection Committee Tab displays the following:

- Selection Committee Pool members
  - 1 Governor's Pool member (non-KYTC)
  - 2 Secretary's Pool members (Professional Engineers)
  - 2 User Division Pool members (normally KYTC Project Managers)
- KYTC Project Manager
- Prime Consultant Firm Name
- Consultant Project Manager

Comments Tab:

The Comments Tab allows users to add Comments or reminders related to the Statewide Contract.

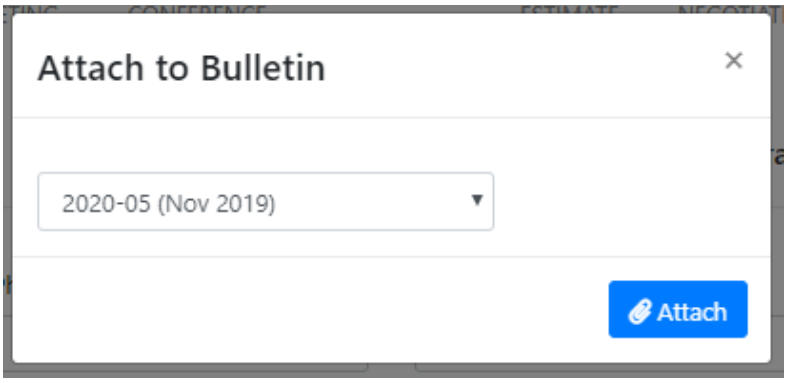


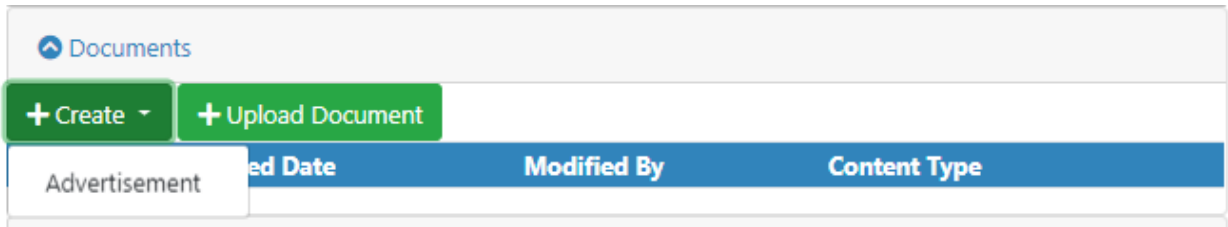
15 Attach Project Specific Contract to Bulletin

Prior to the creation of the Advertisement document, the KYTC user must first attach the Project Specific Contract to the desired Bulletin Number.

Attach Project Specific Contract to Bulletin Number (KYTC District Project Manager and KYTC PSA):

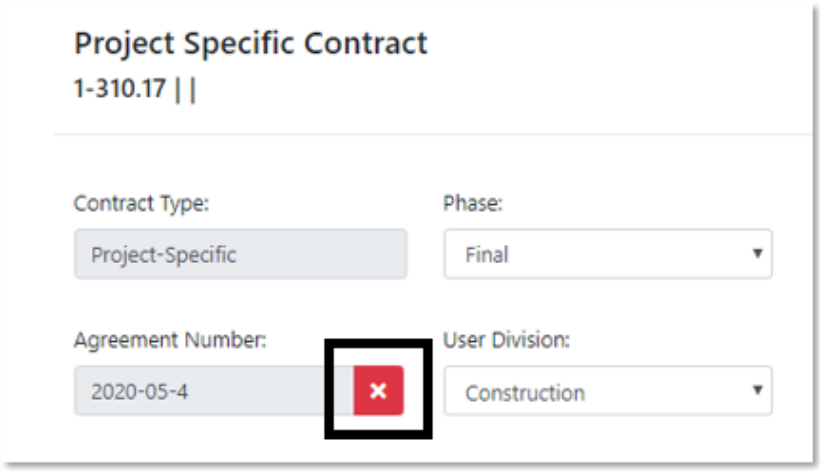
- Selection of the "Attach to Bulletin" option under the "Agreement Number" field within the Project Specific Contract page shall display a list of available Bulletin numbers.
  - Only available Bulletin listings shall be displayed for selection.
  - Upon selection of the desired Bulletin number the user shall select the "Attach" option to "Agreement Number" field populated with the Bulletin Number (e.g. 2019-05 (Nov 2019)).
- Upon attachment of the Bulletin Number, the user shall see the option to create an Advertisement document within the "Documents" tab.

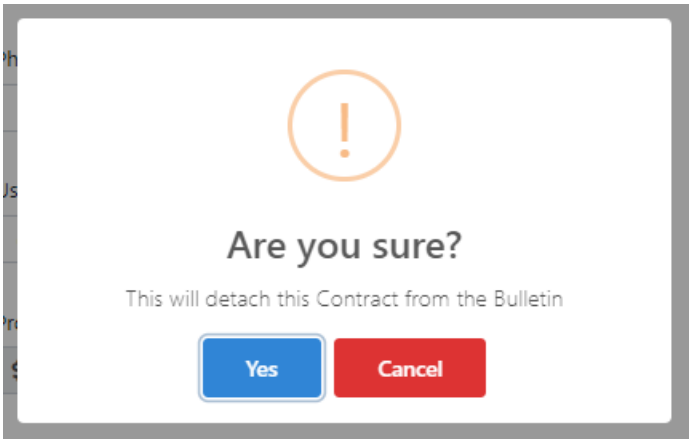


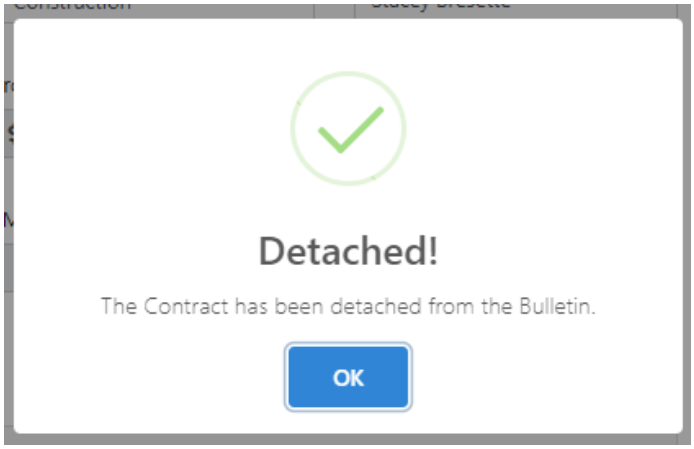


Detach Bulletin Number from a Project Specific Contract (KYTC District Project Manager and KYTC PSA):

- Selection of the "Detach" option under the "Agreement Number" field within the Project Specific Contract screen shall display the "Are you sure? – This will detach this Contract from the Bulletin" pop-up window.
  - Selection of the "Yes" option shall detach the Project Specific Contract from the Bulletin and display the "Detached! – The Contract has been detached from the Bulletin" pop-up window.
    - Detaching the Bulletin from the Contract will also remove the "Create Advertisement" option within the "Documents" tab.
  - Selection of "Cancel" option shall collapse the dialog box and the Contract shall remain attached to the Bulletin.







16 Create Advertisement (RFP)

Advertisements or Request for Proposals (RFP) is a document listing the following:

- Project Description
- Project Manager
- Approximate Fee
- Scope of Work
- Available Studies
- Prequalifications
- Procurement Schedule
- Project Schedule
- Evaluation Factors
- Selection Committee members

The Advertisement document is posted the second Tuesday of each month within the Bulletin on the Professional Services website to solicit consultants for the advertised job.

The following functionality is completed and is ready for testing:

- Create Advertisement (RFP)
- Add / Edit Advertisement Prequalification Service Checklist
- View / Edit / Delete Advertisement (RFP)

Create Advertisement:

Prior to creating an Advertisement, the Project Specific contract must be have an Agreement Number that attaches the contract to a specific Bulletin posting date.

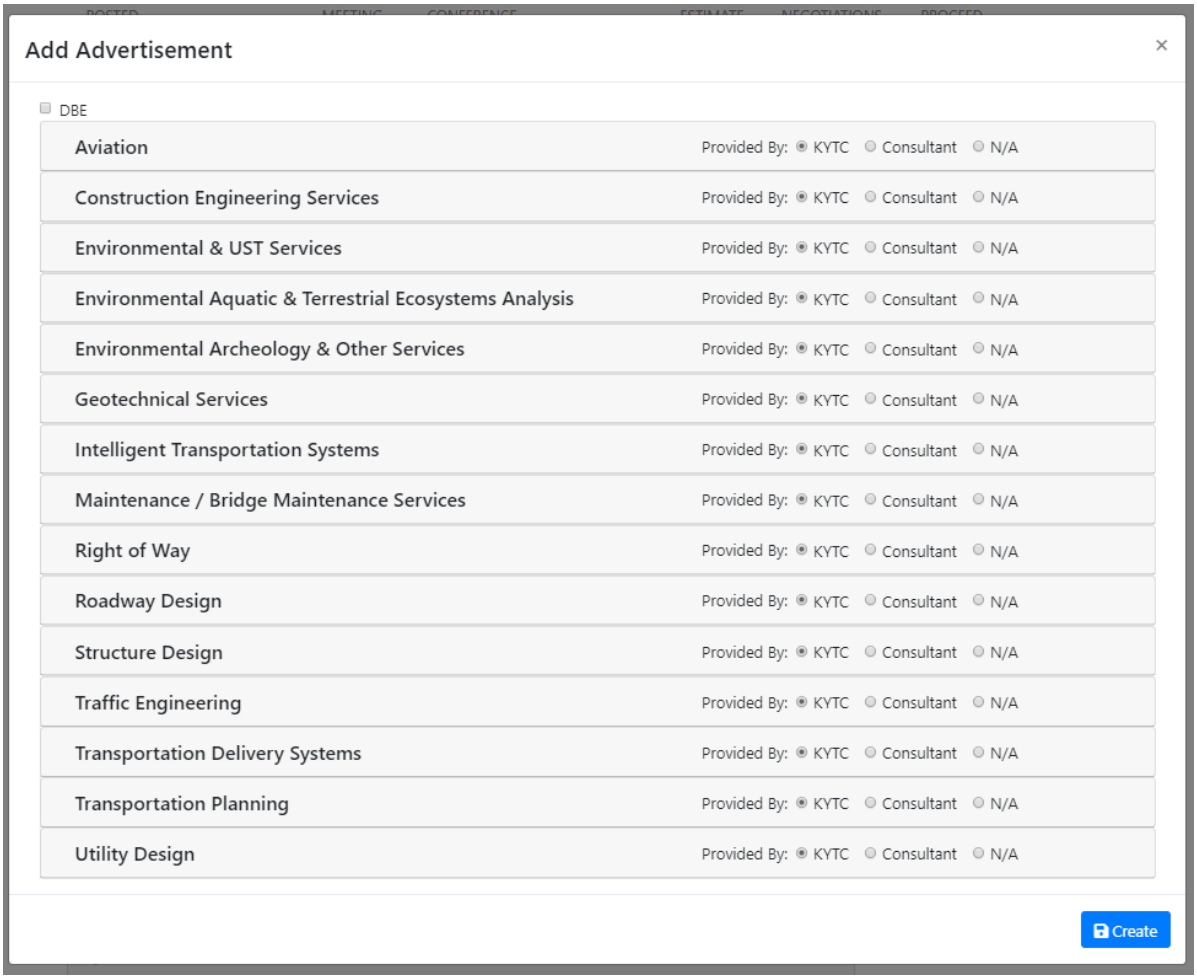
- An authenticated user can select the “Create - Advertisement” option under the Project Specific Contract “Documents” tab to begin the creation of a new Advertisement.
- An authenticated user will see an “Add Advertisement” pop-up window that displays the Prequalification checklist containing a list of available services that will be provided by either KYTC or the Consultant.

Add / Edit Advertisement Prequalification Options:

- Upon selection of the "Create – Advertisement" option, the LE, PM or PSA will see an "Add Advertisement" pop-up window that displays the Prequalification checklist containing a list of available services that will be provided by either KYTC or the Consultant.
    - The selected options are represented on the prequalification section of advertisement template.
- An authenticated user can select the "Create" option to initiate the creation of a new Advertisement document.
    - User shall then see the Advertisement documents displayed in the "Documents – Grid".

View / Edit / Delete Advertisement:

- An authenticated user can select the Advertisement document from the grid to open the document (Word).
- An authenticated user can select the "Edit" option to edit the Advertisement document.
    - User will be navigated to SharePoint site.
- An authenticated user can select the "Trash / Delete" option to delete the Advertisement document.
    - User shall see a dialog box – "Are you sure? – This will remove this Document!"
    - User selection of "Confirm" shall delete the Advertisement from the "Documents – Grid"



17 Advertisement / RFP Approval – Project Specific

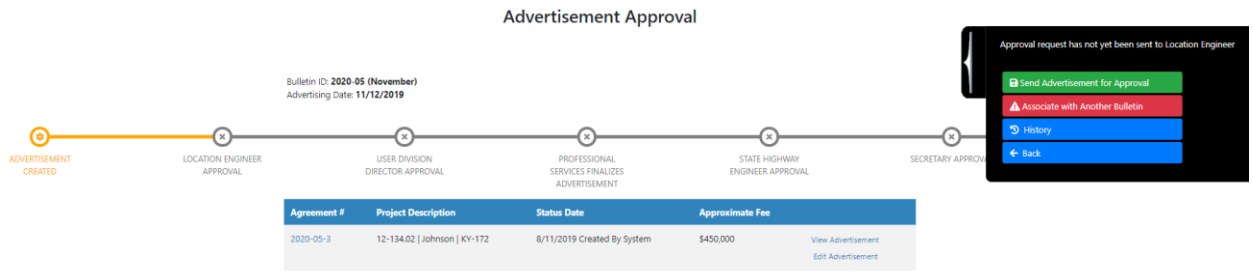
The monthly Procurement Bulletin will contain one or many Advertisements / RFPs containing both Project Specific and Statewide projects. Each individual Advertisement is reviewed and approved by KYTC before being packaged into the monthly Bulletin. Once packaged, the Bulletin is posted to the Professional Services website (indicated by a Bulletin ID).

Prior to Bulletin posting, a Project Specific Advertisement requires a series of KYTC approvals. Each approval step shall be initiated within the PSR2 application. KYTC users are notified of pending approval requests via email notifications. Each email notification contains information related to the Advertisement and links that navigate the user to the appropriate Advertisement Approval page based on their user role.

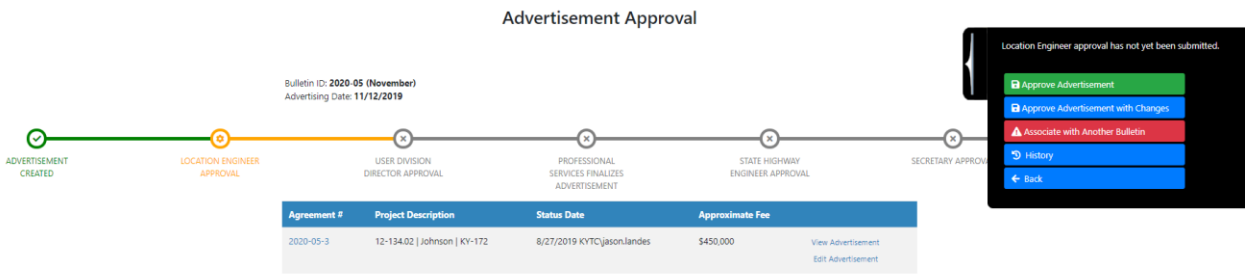
In most instances, a KYTC District Project Manager will create a Project Specific Advertisement and initiate the internal KYTC approval process. However, there will be instances that the KYTC PSA or PS Director roles will need to create an Advertisement and expedite its approval to include as part of the monthly Procurement Bulletin.

The KYTC Project Specific Advertisement approval process contains the following steps (i.e. Happy Path):

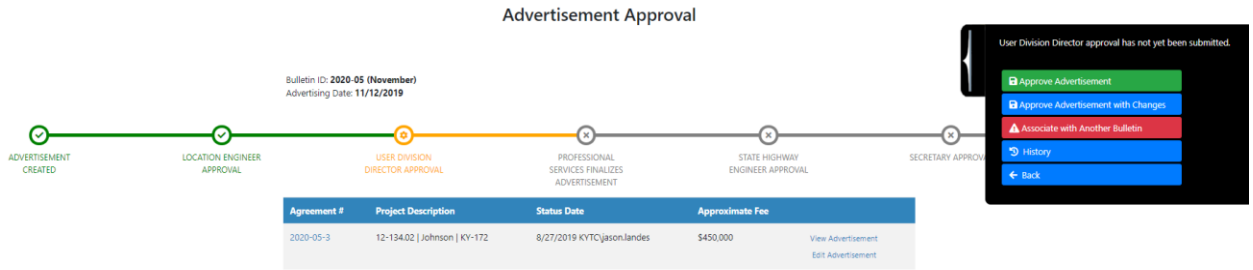
- KYTC Project Manager creates the draft Advertisement document within the Project Specific Contract's "Documents" tab.
    - KYTC Project Manager selects the "Advertisement Approval" option next to the Advertisement document within the "Documents" tab that navigates them to the "Advertisement Approval" screen.
    - KYTC Project Manager initiates the approval process by selecting the "Send Advertisement for Approval" fly-out option within the "Advertisement Approval" screen.
        - PSR2 system sends an email approval request to the KYTC Location Engineer (LE) for that contract.



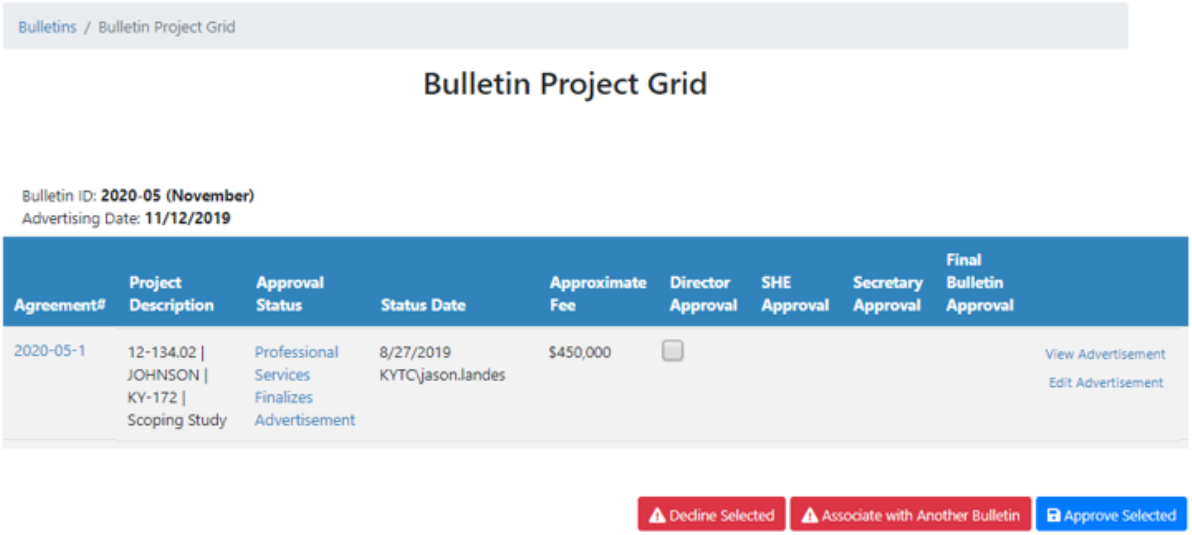
- Upon receipt of the email approval request, the KYTC Location Engineer (LE) selects a link that navigates them to the appropriate "Advertisement Approval" screen.
    - KYTC Location Engineer may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC Location Engineer selects the "Approve Advertisement" fly-out option within the "Advertisement Approval" screen.
    - PSR2 system sends an email approval request to the KYTC Location Engineer for that contract.



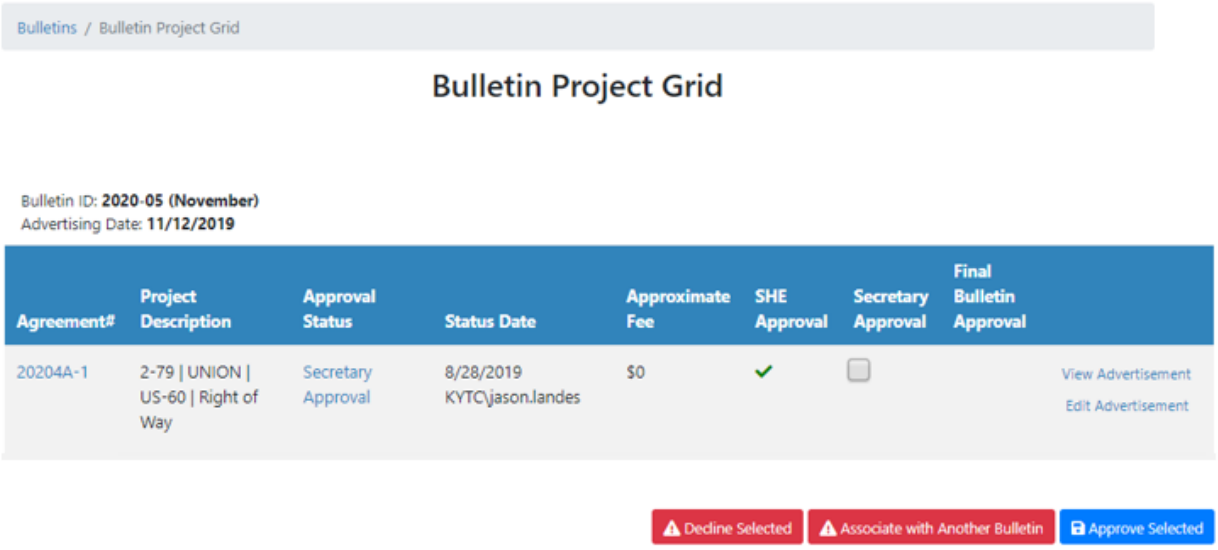
- Upon receipt of the email approval request, the KYTC User Division Director (UDD) selects a link that navigates them to the appropriate "Advertisement Approval" screen.
    - KYTC User Division Director (UDD) may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC User Division Director (UDD) selects the "Approve Advertisement" fly-out option within the "Advertisement Approval" screen.
    - PSR2 system sends an email approval request to the KYTC Professional Services Director.



- Upon receipt of the email approval request, the KYTC Professional Services Director selects a link that navigates them to the "Bulletin Grid" screen.
    - KYTC Professional Services Director may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC Professional Services Director selects the "Director Approval" option within the within the "Bulletin Grid" screen and then the "Approve Selected" option.
    - PSR2 system sends an email approval request to the KYTC State Highway Engineer (SHE) and KYTC Secretary offices.

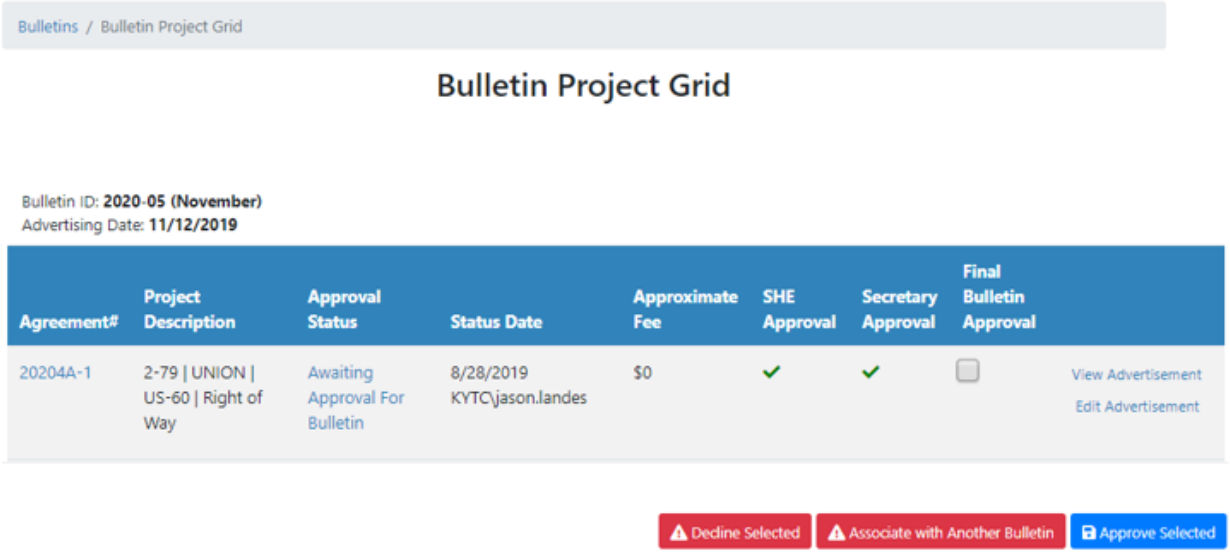


- Upon receipt of the email approval request, the KYTC State Highway Engineer (SHE) selects a link that navigates them to the "Bulletin Grid" screen.
    - KYTC State Highway Engineer (SHE) may make update minor updates / modifications to the Advertisement document prior to approving.
    - KYTC State Highway Engineer (SHE) selects the "SHE Approval" option within the within the "Bulletin Grid" screen and then the "Approve Selected" option.
    - PSR2 system sends an approval email to the KYTC Professional Services Director.
        - Note: This step may be concurrent with the "Secretary" approval step.

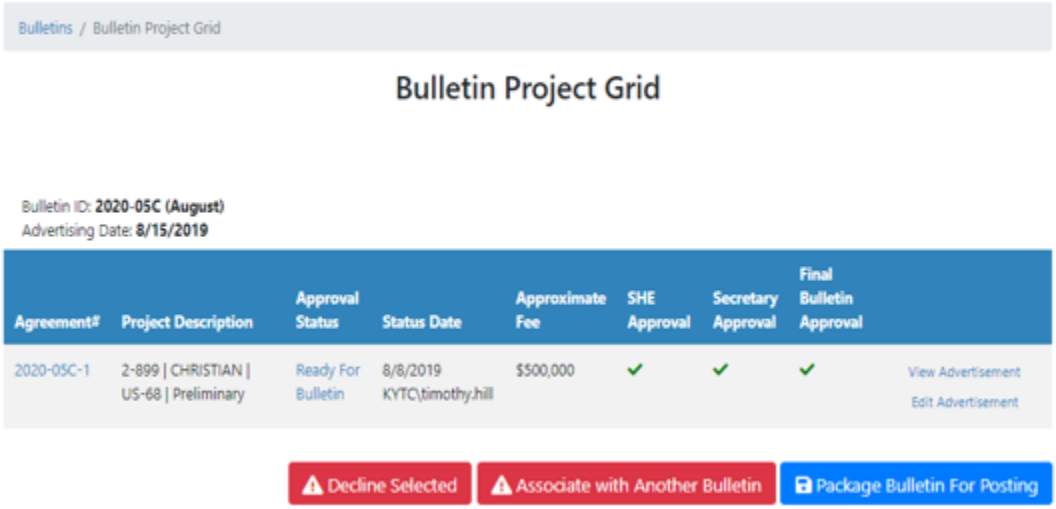


- Upon receipt of the email approval request, the KYTC Secretary selects a link that navigates them to the "Bulletin Grid" screen.
    - KYTC Secretary may make update minor updates / modifications to the Advertisement document prior to approving.

- KYTC Secretary selects the “Secretary Approval” option within the within the “Bulletin Grid” screen and then the “Approve Selected” option.
- PSR2 system sends an approval email to the KYTC Professional Services Director.
  - Note: This step may be concurrent with the “SHE” approval step.



- Upon approval from both the KYTC SHE and Secretary Offices, the KYTC Professional Services group will package all of the approved Advertisements for that month into the Bulletin.
- KYTC Professional Services group will post the Procurement Bulletin to the Professional Services website on the Advertisement Date.



18 Estimates – Project Specific Contracts

Once the Selection Committee selects the Primary Consultant for a Project Specific Contract and a Scoping Meeting is held, the Estimates process may begin.

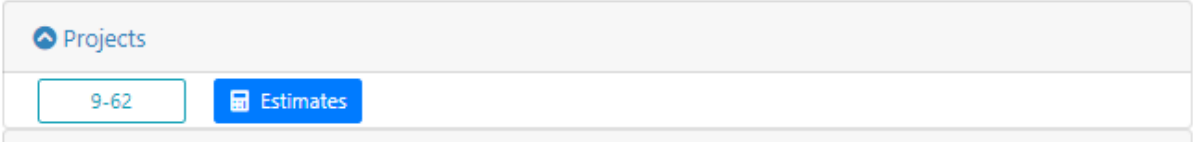
The PSR2 Estimates interface provides a central location to collect Production Hour Estimates. This allows for the submission of consistent person-hour estimates, which will provide easier reporting and analysis of historical negotiated project costs and compare projects of similar scope.

The PSR2 Estimates workflow for Project Specific Contract includes the following steps:

- Submit Agreed Units
- Agreed Units Approval
- Consultant Estimates
- Submit KYTC Estimates
- KYTC Estimates Approval
- Offer Negotiated Amounts
- Accept Negotiated Amounts

To navigate to the desired Estimates worksheet:

- User opens the Project Specific Contract from the Dashboard.
- User selects the “Estimate” option within the “Projects” tab.
- User navigates to “Estimates” screen.
- User selects “Estimate Worksheet” type.
- Selected Estimate Worksheet displays (e.g. Highway Design, Right of Way, etc.).



18.1 Estimates – Submit Agreed Units

The first step in the Estimates process is for the Primary Consultant Project Manager to enter and submit “Agreed Units” in the Estimates worksheet.

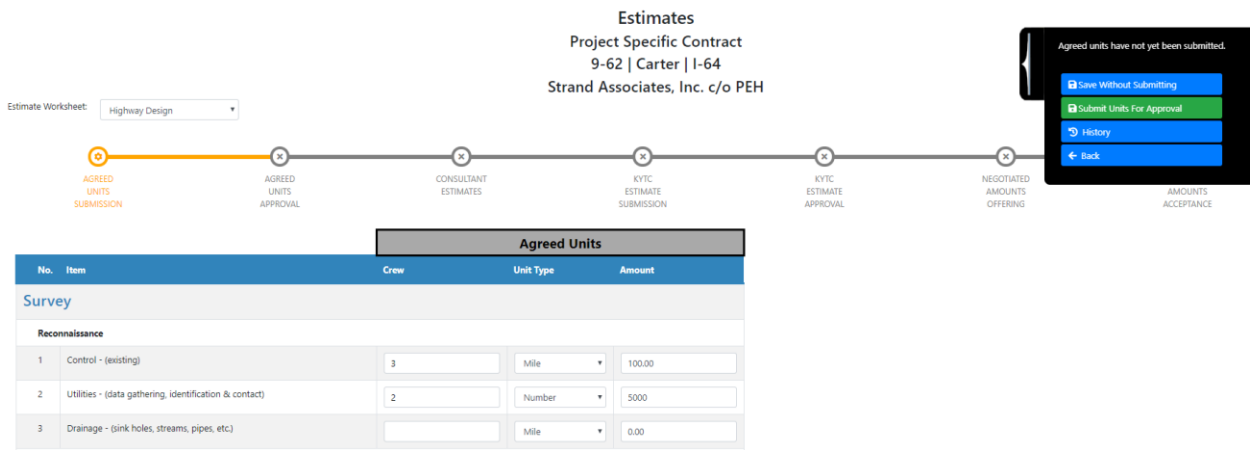
Please note: The PSA can also enter and submit Agreed Units on behalf of the Consultant. In addition, the Project Manager (Central Office), Project Manager (District) and Location Engineer can enter in Agreed Units, but are unable to submit them.

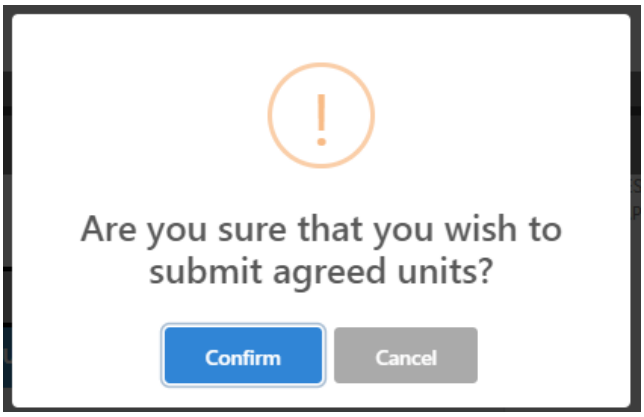
Agreed Units Submission:

- The Consultant user enters the “Crew” value for each line item under “Agreed Units”.
    - System will pre-populate “1” as the “Crew” value for every row.
    - System will display a blank cell for “Crew” if the value is “1”.
    - System will pre-populate “Unit Type” from the “Estimate Items” type table.
- The Consultant user can select the appropriate “Unit Type” if it is different from the pre-populated value.

- The Consultant user can enter the "Amount" for appropriate line items.
- The Consultant user can add “Miscellaneous” line items for each Sub-Category marked “Miscellaneous”
    - The Consultant user is unable edit the “No” field.
- The Consultant user selection of the fly-out on the right side of the page shall expand to display the following options:
    - Save Without Submitting
        - An authenticated user can select the “Save without submitting” option to save the current estimate worksheet without submitting.
        - User should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
    - Submit Units for Approval
        - An authenticated user can select the “Submit Units for Approval” option to submit the agreed units for approval.
        - User should see a confirmation box - "Are you sure that you wish to submit Agreed Units? “
        - Upon submittal, the KYTC Project Manager shall receive an email notification.
    - History
        - An authenticated user can select “History” from fly-out to view a timestamp of submission including the user name.

    - Back
        - An authenticated user can select “Back” to return to Contract screen.





18.2 Estimates – Agreed Units Approval

The next step in the Estimates process is for KYTC to approve the submitted Agreed Units. Typically, this step is completed by the KYTC District Project Manager, but can also be completed by the KYTC District Branch Manager or the KYTC Location Engineer.

Agreed Units Approval:

- The KYTC user opens the Estimates Worksheet to begin “Agreed Units Approval”.
- The KYTC user can edit the “Crew” value for each line item.
    - System will pre-populate “1” as the “Crew” value for every row.
    - System will display a blank cell for “Crew” if the value is “1”.
    - System will pre-populate “Unit Type” from the “Estimate Items” type table.
- The KYTC user can edit the appropriate “Unit Type” if it is different from the pre-populated value.
- The KYTC user can edit the "Amount" for appropriate line items.
- The KYTC user can edit “Miscellaneous” line items for each Sub-Category marked “Miscellaneous”.
    - The KYTC user is unable to edit the “No” field.
- Upon edit of any field, a dialog box will display – “You are about to change previously submitted agreed unit valued. Once Saved, old values will be overwritten.”
- The KYTC user can expand the fly-out on the right side of the page to see the following options:
    - Approve Agreed Units
        - The KYTC user can select the “Approve Agreed Units” option.
        - The KYTC user should see a confirmation box - "Are you sure you want to approve the Agreed Units? Once approved, the list of "Items", "Unit Types" and "Amounts" may not be changed"
        - The KYTC user cannot make updates to "Item", "Crew", "Unit Type" and "Amount" after "Agreed Units" Approval.
            - Only users on the "Estimates Overrides" exception list will be allowed to update these values after approval
        - After “Agreed Units” are approved, the KYTC user can see that all items where:

- "Amount" = 0 should be hidden
- Sub-Categories with no items are hidden
- All Categories with no sub-categories are hidden

▪ Upon approval of "Agreed Units" values, the Primary Consultant Project Manager shall receive an email notification.

○ Save Without Submitting

▪ The KYTC user can select the "Save without submitting" option to save the current estimate worksheet without submitting.

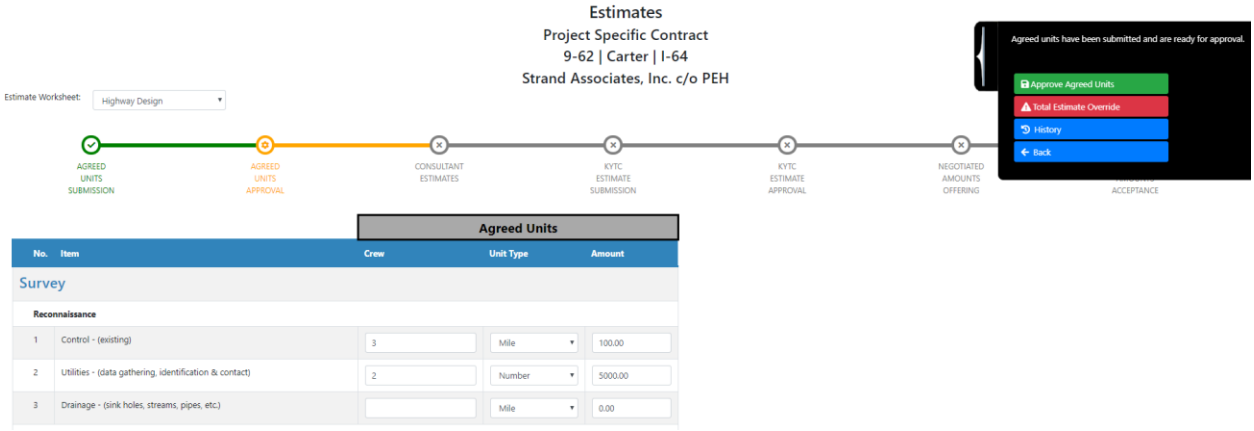
- The KYTC user should see a confirmation box – "Value will be saved but not submitted. Please remember to submit these values once finished."

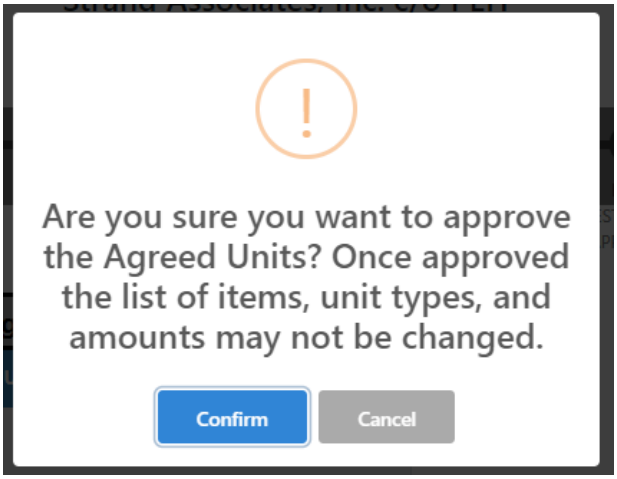
○ History

▪ The KYTC user can select "History" from fly-out to view a timestamp of submission including the user name.

○ Back

The KYTC user can select "Back" to return to Contract screen.



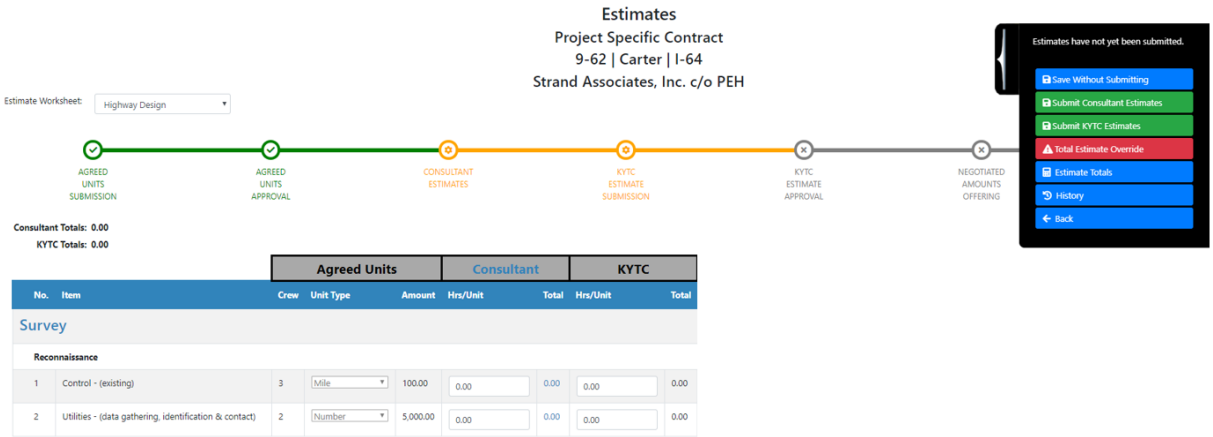


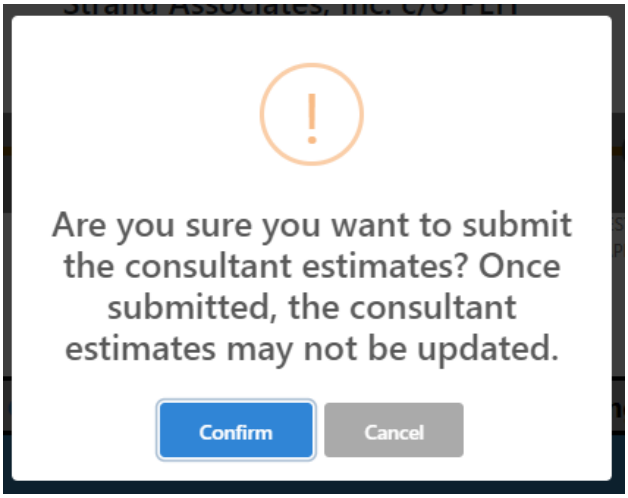
18.3 Estimates – Consultant Estimates

The next step in the contract negotiation process is for the Primary Consultant Project Manager to enter estimates for "Hrs. /Unit" values.

Enter Consultant Estimates:

- The Consultant user can see the “Agreed Units” and “Consultant Estimates” columns.
- The Consultant user can enter Consultant Estimate "Hrs. /Unit" values for each row.
- The Consultant user can expand the fly-out on the right side of the page to see the following options:
    - Save Without Submitting
        - The Consultant user can select the "Submit Consultant Estimates" option.
        - The Consultant user should see a confirmation box - "Are you sure you want to submit the Consultant Estimates? Once submitted, the Consultant Estimates may not be updated".
    - Submit Consultant Estimates
        - The Consultant user can select the “Save without submitting” option to save the current estimate worksheet without submitting.
        - The Consultant user should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
        - Upon submittal of “Consultant Estimates” values, they KYTC Project Manager, KYTC Location Engineer and KYTC PSA shall receive email notifications.
    - History
        - An authenticated user can select “History” from fly-out to view a timestamp of submission including the user name.
    - Back
        - An authenticated user can select “Back” to return to Contract screen.





18.4 Estimates – Submit KYTC Estimates

This step allow the KYTC Project Manager to enter / submit Estimates for "Hrs. /Unit" values.

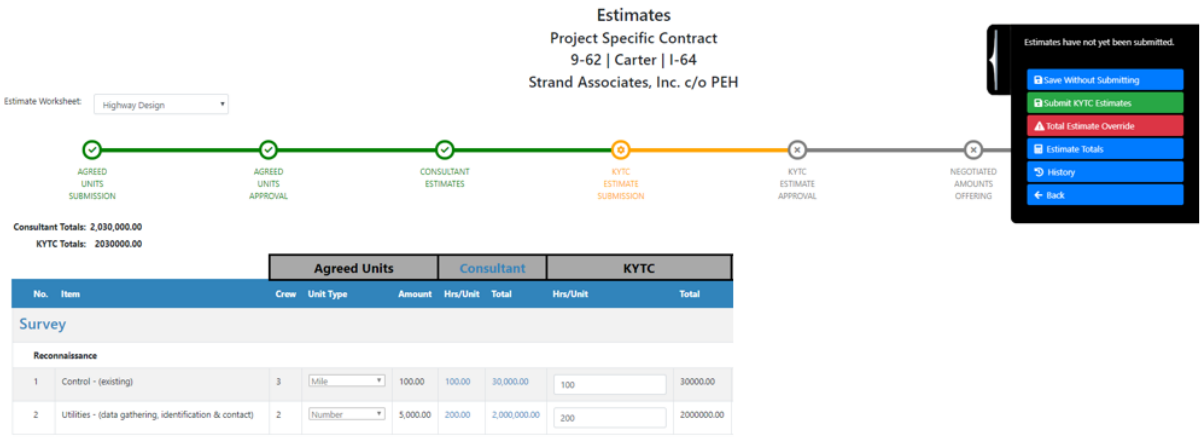
Note: If the Consultant Estimate is under 500 hours, the DBM / PM, LE or PSA shall immediately see a dialog box upon entry of the Estimates screen – "The consultant firm has submitted as estimate totaling less than 500 hours. Would you like to copy those values to your KYTC estimate? You will have the chance to edit these values before submission."

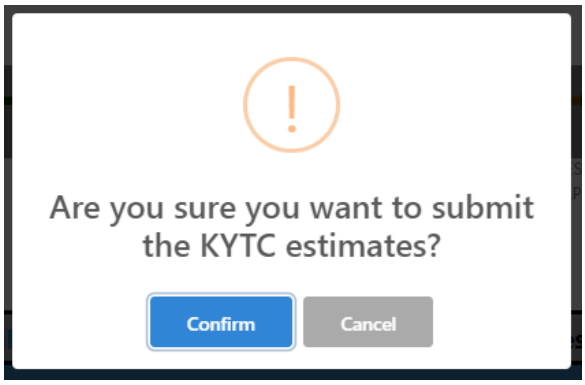
Submit KYTC Estimates:

- The KYTC user can view the "Agreed Units" and "KYTC Estimates" columns.
- The KYTC user can enter KYTC Estimates "Hrs. /Unit" values for each row.
- The KYTC user can expand the fly-out on the right side of the page to see the following options:
    - Save Without Submitting
        - The KYTC user can select the "Save without submitting" option to save the current estimate worksheet without submitting.
        - User should see a confirmation box – "Value will be saved but not submitted. Please remember to submit these values once finished."
    - Submit KYTC Estimates
        - The KYTC user can select the "Submit KYTC Estimates" option to submit the worksheet for approval.
        - The KYTC user shall see a dialog box – "Are you sure you want to submit the KYTC estimates?"
        - Upon submittal of "KYTC Estimates" values, the KYTC Location Engineer shall receive an email notification.
    - Total Estimate Override (Only for PSA role)
        - The KYTC PSA can select the "Total Estimate Override" option.
        - The KYTC PSA should see a confirmation box – "All approvals for this worksheet will be reset. Do you wish to proceed?"
        - The KYTC PSA selection of this option shall reset the Estimate Worksheet to the "Agreed Units Submission" step.
    - History

- The KYTC user can select “History” from fly-out to view a timestamp of submission including the user name.

- Back
  - An authenticated KYTC user can select “Back” to return to Contract screen.





18.5 Estimates – KYTC Estimates Approval

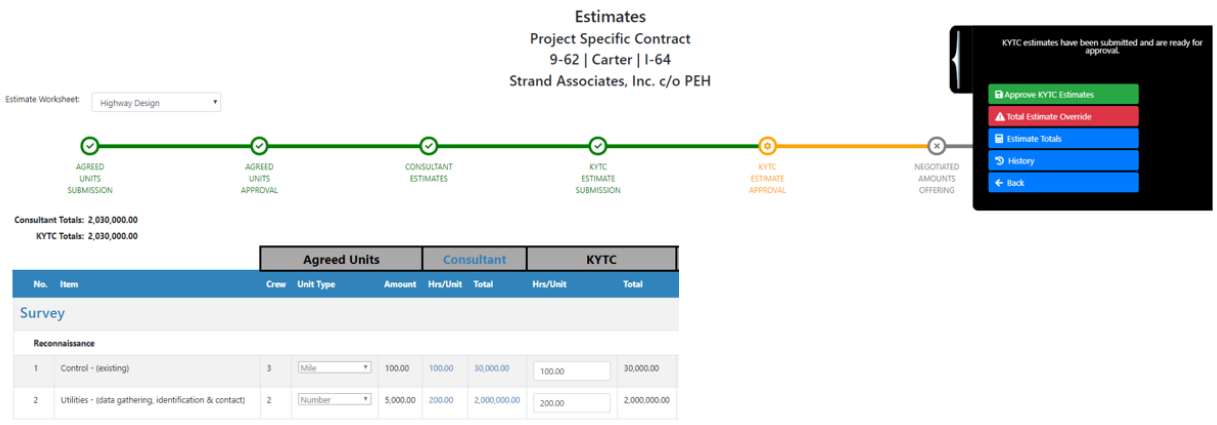
The KYTC Location Engineer can approve KYTC Estimates for "Hrs. /Unit" values to progress the Estimates process.

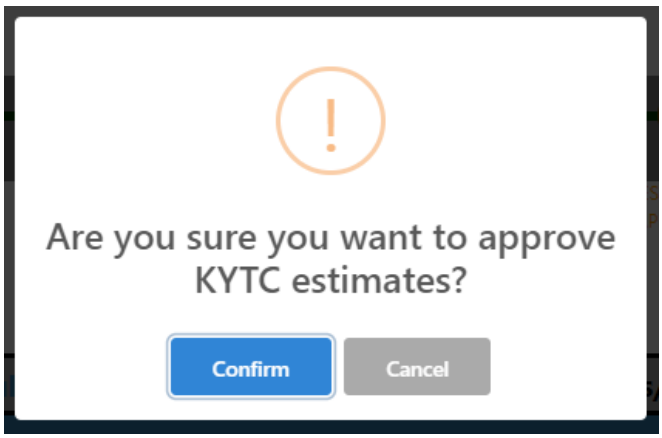
Approve KYTC Estimates:

- The KYTC Location Engineer can see the “Agreed Units”, “Consultant” and “KYTC” columns.
- The KYTC Location Engineer enters KYTC Estimates Approval "Hrs. /Unit" values for each row.
  - Upon value edit, a confirmation box will open – “You are about to change previously submitted KYTC estimate values. If you continue, estimate approval progress will be reset.”
  - The KYTC Location Engineer selection of “Confirm” option shall take user back to the KYTC Estimate Submission.
- The KYTC Location Engineer can expand the fly-out on the right side of the page to see the following options:
  - Approve KYTC Estimates

- The KYTC Location Engineer can select the “Approve KYTC Estimates” option to submit the worksheet for approval.
- User shall see a dialog box – “Are you sure you want to approve KYTC estimates?”
- Upon approval of the “KYTC Estimates” values, the Primary Consultant Project Manager and KYTC Project Manager shall email notifications.

- Total Estimate Override (Only for PSA role)
  - The KYTC PSA can select the “Total Estimate Override” option.
    - The KYTC PSA should see a confirmation box – “All approvals for this worksheet will be reset. Do you wish to proceed?”
    - The KYTC PSA selection of this option shall reset the Estimate Worksheet to the “Agreed Units Submission” step.
- History
  - An authenticated KYTC user can select “History” from fly-out to view a timestamp of submission including the user name.
- Back
  - An authenticated KYTC user can select “Back” to return to Contract screen.





18.6 Estimates – Offer Negotiated Amounts

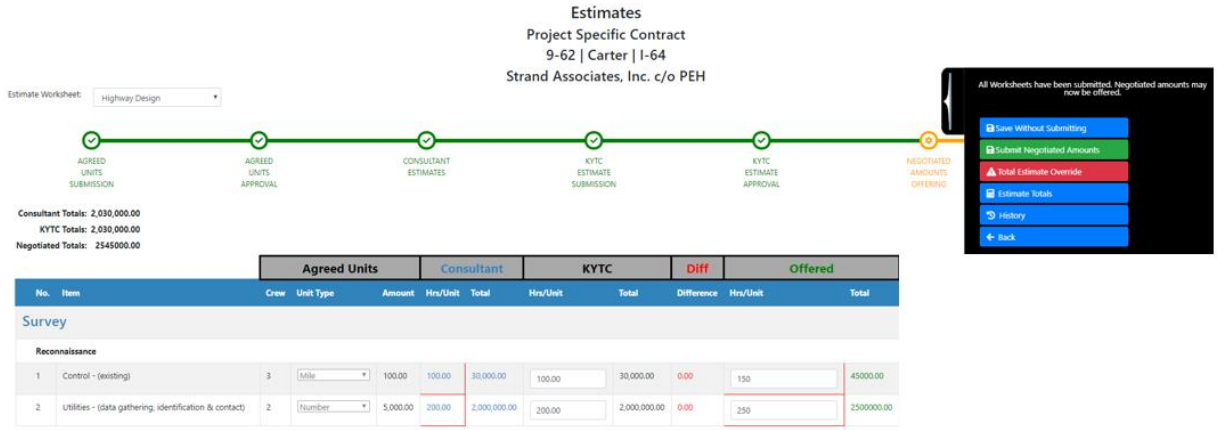
Once KYTC Estimates are approved, the KYTC PSA enters and submits "Negotiated Amounts" values.

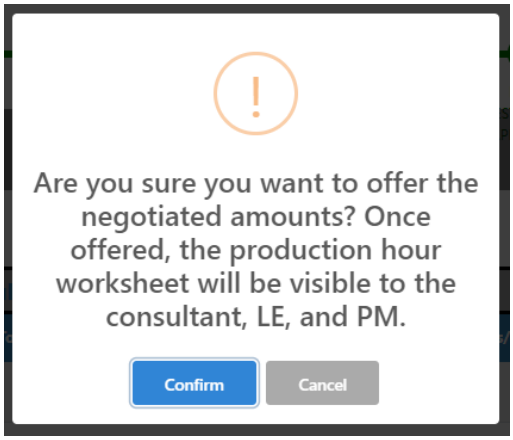
Offer Negotiated Amounts:

- The KYTC PSA can see the “Agreed Units”, “Consultant”, “KYTC”, “Difference”, “Offered” and “Ranges Hrs. / Unit (Min / Max) columns.
- The KYTC PSA on the “Negotiated Amounts Offerings” Estimates step should see the "Negotiated Hrs. /Unit" with the values from the "Consultant Hrs. /Unit" if the "Negotiated Hrs. /Unit" values are blank.
- The KYTC PSA should see that the "Offered Hrs. /Unit" values are highlighted when they are not equal to the "Consultant Hrs. /Unit" values.
- The KYTC PSA can add/remove/edit the "Negotiated Hrs. /Unit" values for each item.
    - The KYTC PSA should see a dialog box – “You are about to change previously submitted KYTC estimate values. If you continue, estimate approval progress will be reset.”
    - The KYTC PSA selection of “Confirm” option shall return the user back to the “KYTC Estimates Submission” Estimates step.
- The KYTC PSA can expand the fly-out on the right side of the page to see the following options:
    - Submit Negotiated Amounts
        - The KYTC PSA can select the “Submit Negotiated Amounts” option to send the amounts to the consultant for approval.
            - The KYTC PSA should see a confirmation box - "Are you sure you want to offer the Negotiated Amounts? Once offered, the Production-Hour Worksheet will be visible to the consultant, LE and PM".
        - The KYTC PSA cannot offer the "Negotiated Amounts" until the Consultant Estimates are submitted AND the KYTC Estimates are approved.
            - The KYTC PSA should see an error message - "Negotiated Amounts may not be offered until the Consultant Estimates have been submitted AND the KYTC Estimates have been approved".
        - The KYTC PSA can NOT finalize the "Negotiated Amounts" until the "Negotiated Amounts" have been offered
            - User should see an error message - "Negotiated Amounts must be offered before they can be accepted"
            - Once "Negotiated Amounts" are accepted, only users on the "Estimates Overrides" exception list can update these values.
        - Upon submittal of the “Negotiated Amounts” value, the Primary Consultant Project Manager, KYTC Project Manager and KYTC Location Engineer shall receive an email notification.
    - Save Without Submitting
        - The KYTC PSA can select the “Save without submitting” option to save the current estimate worksheet without submitting.
            - The KYTC PSA should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
    - Total Estimate Override (Only for PSA role)
        - The KYTC PSA can select the “Total Estimate Override” option.
            - The KYTC PSA should see a confirmation box – “All approvals for this worksheet will be reset. Do you wish to proceed?”

- The KYTC PSA selection of this option shall reset the Estimate Worksheet to the “Agreed Units Submission” step.

- Estimate Totals
  - The KYTC PSA can select the “Estimate Totals” option that shall display the Production Hour Summary for the Estimate Worksheet:
    - Category
    - Consultant Total
    - KYTC Total
    - Negotiated Total
- History
  - The KYTC PSA can select “History” from fly-out to view a timestamp of submission including the user name.
- Back
  - The KYTC PSA can select “Back” to return to Contract screen.





18.7 Estimates – Accept Negotiated Amounts

The final step in the Estimation process is for the Primary Consultant Project Manager to accept the Negotiated Amounts. If Primary Consultant does NOT accept the Negotiated Offer, they can contact Professional Services outside of the system for Negotiation Discussions.

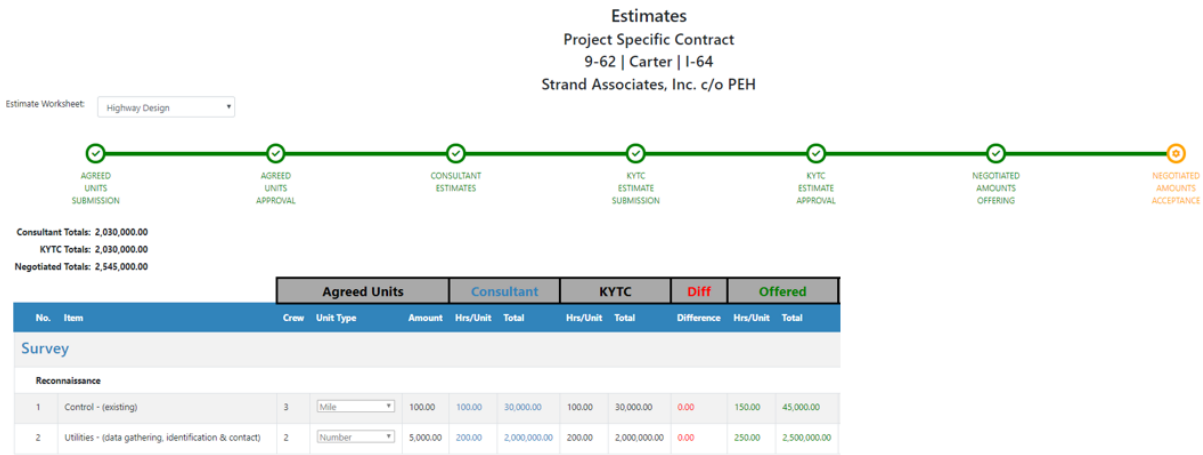
Note: A KYTC PSA role may accept Negotiated Amount on behalf of the Consultant.

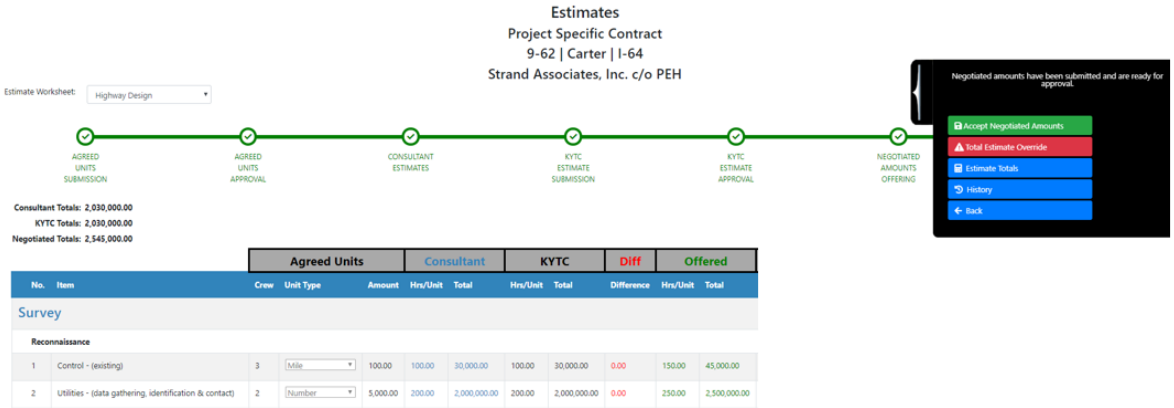
Accept Negotiated Amounts:

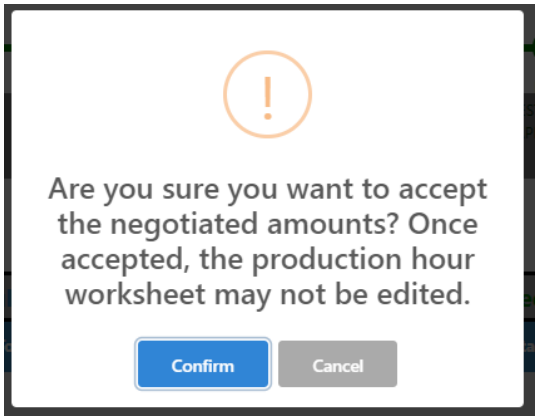
- The Consultant user can navigate to the Estimate worksheet to view the “Negotiated Amounts Acceptance” step (view only).
- The Consultant user can see the “Agreed Units”, “Consultant” and “Offered” columns.
- The Consultant user can view the "Agreed Units", "Consultant Estimates", "KYTC Estimates", "Difference" and "Negotiated Amounts" only once the "Negotiated Amounts are accepted.
    - User should NOT see the far-right calculated fields (Only PSAs should see this).
- The Consultant user can expand the fly-out on the right side of the page to see the following options:
    - Accept Negotiated Amounts
        - The Consultant user can select the “Accept Negotiated Amounts” option to accept the negotiated amounts.
            - The Consultant user should see a confirmation box - "Are you sure you want to accept the Negotiated Amounts? Once Negotiated Amounts are accepted, the Production-Hour Worksheet may NOT be edited.”
            - Once Negotiated Amounts are accepted, the “Offered” header should change to read “Negotiated”.
            - Once Negotiated Amount are accepted, the assigned Consultant can view the "Agreed Units", "Consultant Estimates", "KYTC Estimates", "Difference" and "Negotiated Amounts".
            - The Consultant user should NOT see the far-right calculated fields (Only PSAs should see this).

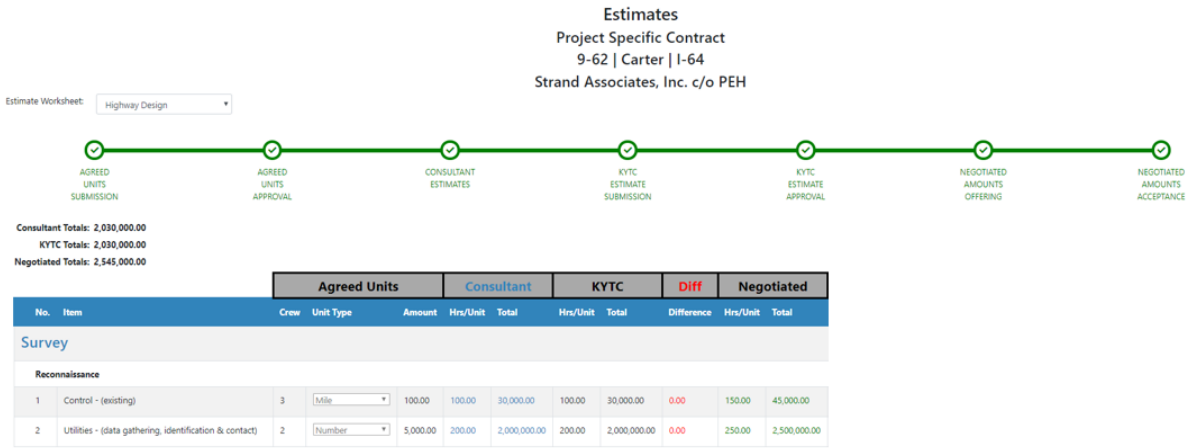
- The Consultant user shall NOT be able to edit any field on this page after "Negotiated Amounts" are accepted.

- Estimate Totals
  - The Consultant user can select the "Estimate Totals" option that shall display the Production Hour Summary for the Estimate Worksheet:
    - Category
    - Consultant Total
    - KYTC Total
    - Negotiated Total
- History
  - The Consultant user can select "History" from fly-out to view a timestamp of submission including the user name.
- Back
  - The Consultant user can select "Back" to return to Contract screen.









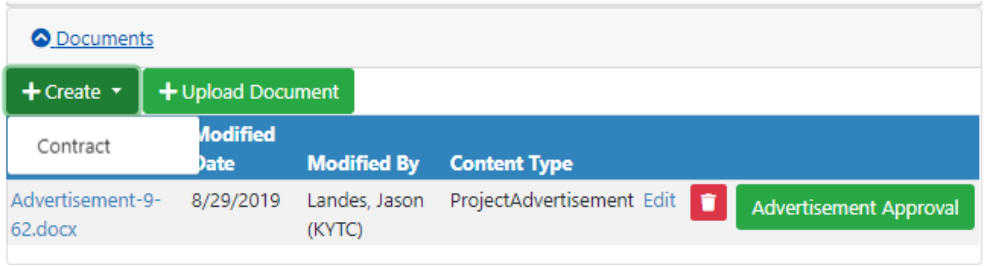
19 Project Specific Contract Document Approval

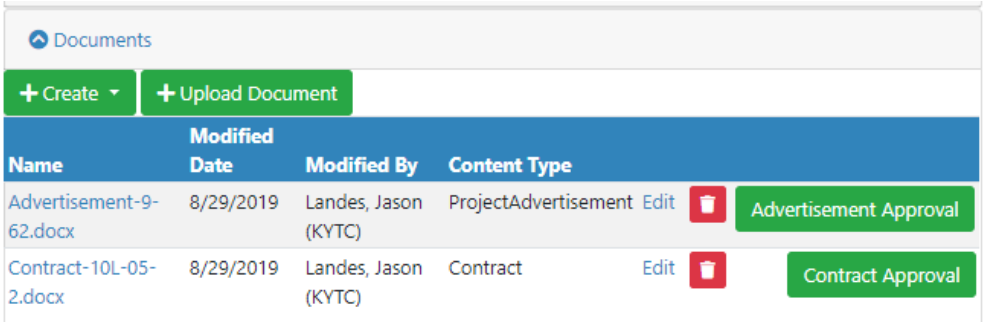
The Project Specific Contract approval process allows for electronic signatures (e-signatures) within the PSR2 application. Both Consultant and KYTC approvers will be sent email notifications requesting that their approval / e-signature is required on the given contract. Upon receipt of all required e-signatures, the Professional Services group will create the Notice to Proceed document.

19.1 Create Draft Project Specific Contract Document

Contract Document Approval – Create Draft Contract (Professional Services Admin):

- Upon acceptance of the **"Negotiated Amounts"** Estimates step, the KYTC Professional Services Admin (PSA) will create a draft Contract document and begin the Contract approval process.
- The KYTC PSA will select the "Contract" option from the "Documents" tab within the Project Specific Contract screen.
- Upon creation of draft Contract document, the KYTC PSA or Primary Consultant Project Manager shall select the "Contract Approval" option that will navigate the user to the "Contract Approval" screen to begin the approval process.

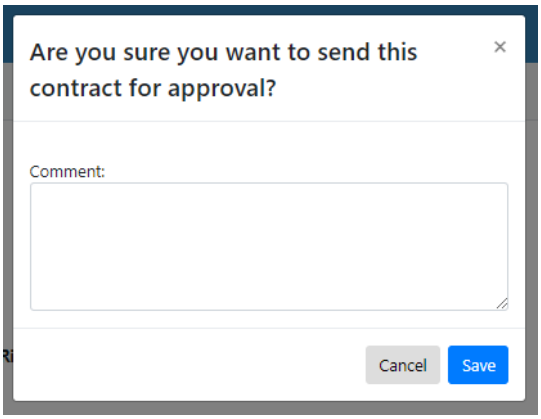




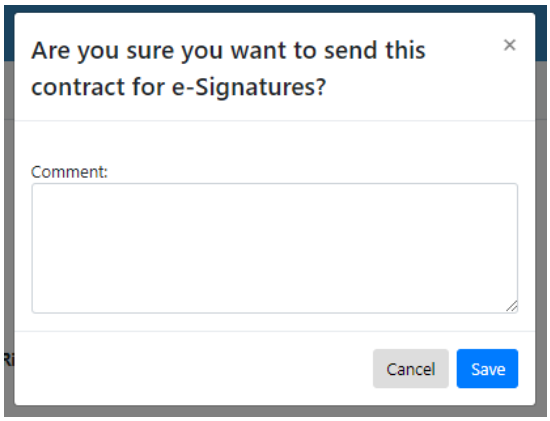
19.2 Approve Draft Project Specific Contract Document

- Upon selection of the "Contract Approval" option in the "Documents" tab within the Project Specific Contract screen, the user is navigated to the "Contract Approval" screen.

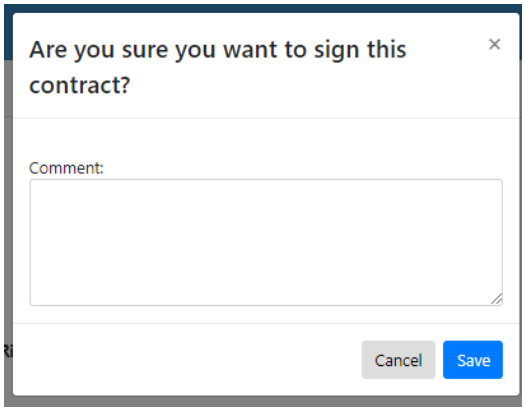
- The user begins the Contract approval process by selecting the "Send Draft Contract for Approval" option within the fly-out on the right side of the page.
    - PSR2 system sends an email approval request to the KYTC Professional Services Admin.



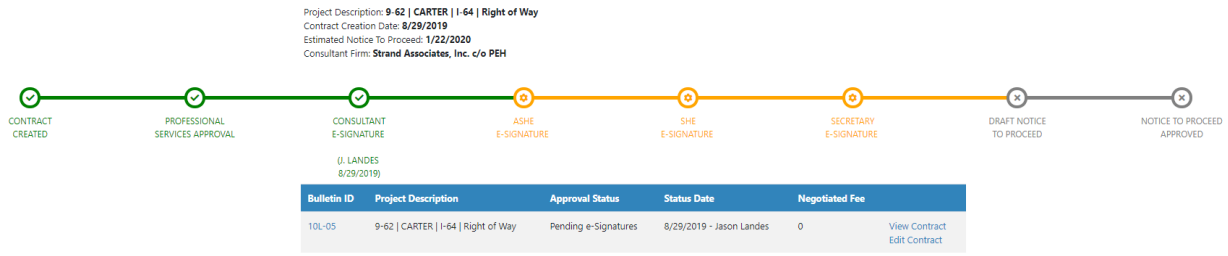
- Upon receipt of the email approval request, the KYTC PSA selects a link that navigates them to "Contract Approval" screen.
- The KYTC PSA user shall review the draft contract and make necessary edits.
- During review, the KYTC PSA user may select one of the following options within the fly-out on the right side of the page.
    - Approve Contract
    - Approve Contract with changes
    - Decline Contract
- Upon approval of the draft Contract, the KYTC PSA user selects the "Approve Contract" option to begin the Contract e-Signature process.
    - PSR2 system sends an email approval request to the following:
        - Primary Consultant Project Manager
        - KYTC Assistant State Highway Engineer (ASHE)
        - KYTC State Highway Engineer (SHE)
        - KYTC Secretary



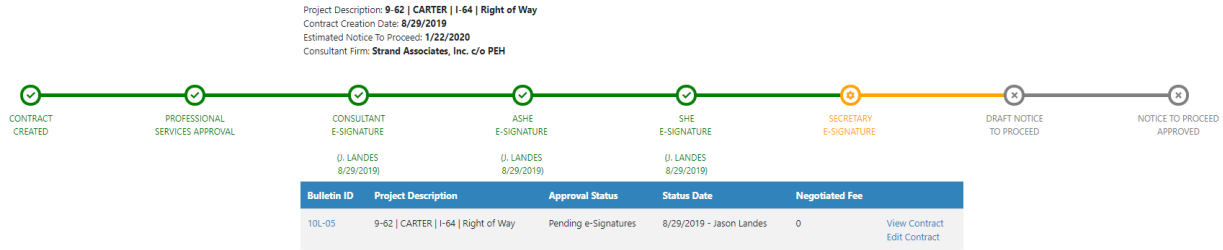
- Upon receipt of the email approval request, the given user selects a link that navigates them to "Contract Approval" screen.
    - The requested approver shall see the following options within the fly-out on the right side of the page:
        - e-Sign Contract
        - Approve Contract with changes
        - Decline Contract
    - Contract approvals are done simultaneously
    - A Project Specific contract is considered approved once all of the required e-Signatures are captured by the PSR2 application.



Contract Approval



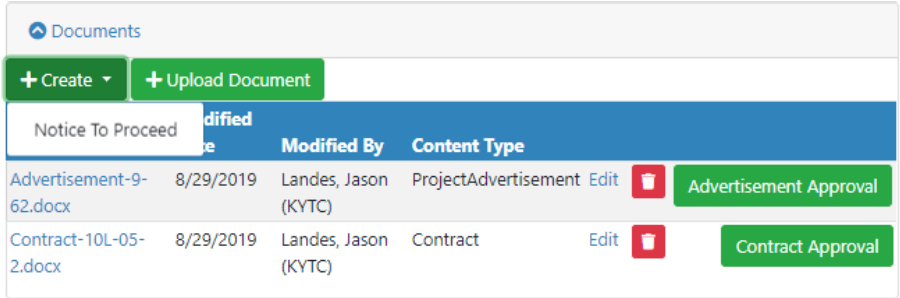
Contract Approval



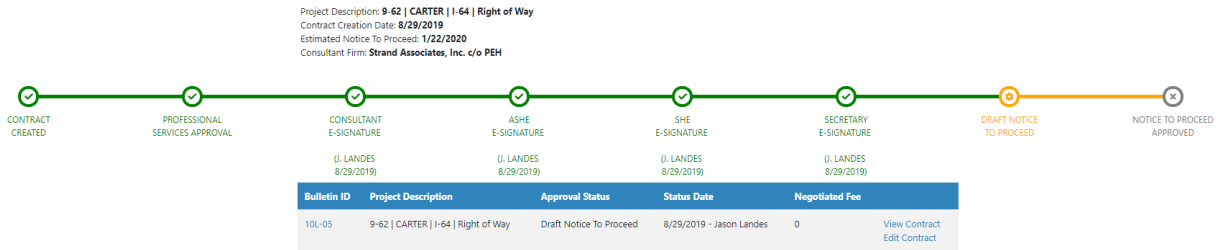
19.3 Create Draft Notice to Proceed Document

Contract Document Approval – Create Draft Notice to Proceed (Professional Services Admin)

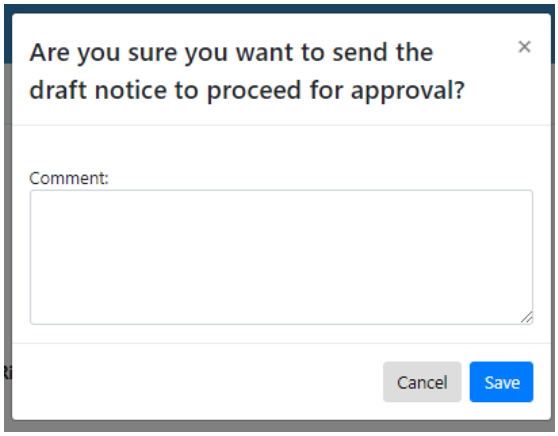
- Once all required contract e-Signatures are captured, the Notice to Proceed document can be created that indicates that the Primary Consultant firm can begin work on the contract.
- The KYTC Professional Services Admin shall generate the draft Notice to Proceed document
- KYTC PSA user selection of the “Notice to Proceed” option under the “Create” dropdown within the “Documents” tab shall generate the draft Notice to Proceed document.
- Upon selection of the “Send Notice to Proceed for Approval” fly-out option on the right side of the “Contract Approval” screen, an email notification shall be sent to the Professional Services Director to review the draft Notice to Proceed document.



Contract Approval



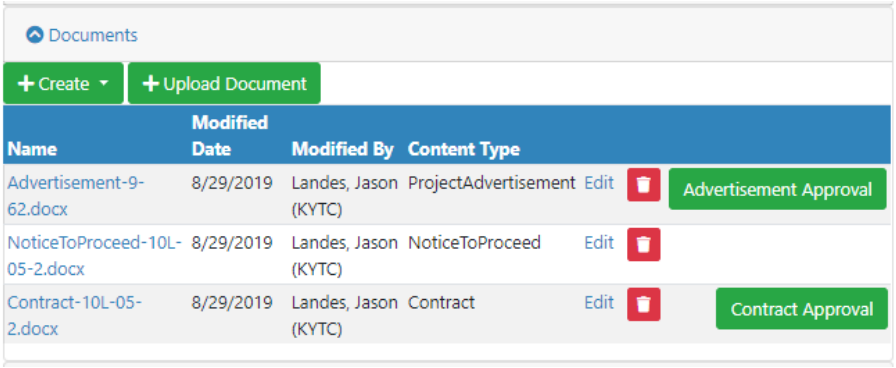
Contract Approval



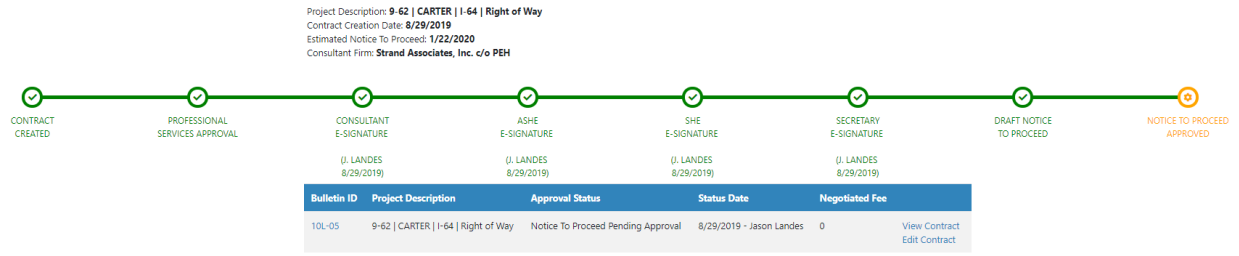
19.4 Approve Draft Notice to Proceed Document

Contract Document Approval – Approve Notice to Proceed (Professional Services Director)

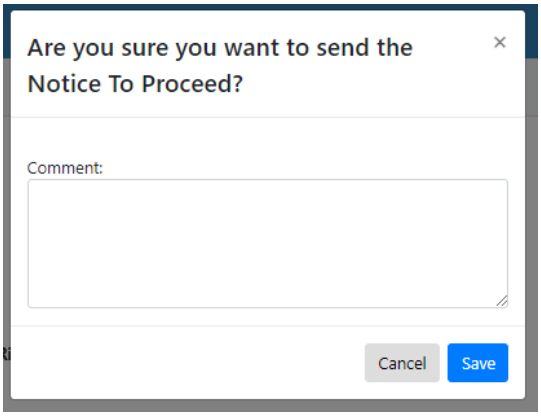
- Upon receipt of the email approval request, the KYTC Professional Services Director shall select a link that navigates them to “Contract Approval” screen.
- The KYTC Professional Services Director shall review / approve the draft Notice to Proceed document.
- Upon approval of the Notice to Proceed document, the Professional Services Director shall select the “Send Notice to Proceed Notification” fly-out option on the right side of the “Contract Approval” screen to send an email notification to the following:
    - Prime Consultant Project Manager
    - KYTC Project Manager
    - KYTC Location Engineer
    - KYTC Professional Services Admin
- Receipt of this email notification shall indicate that the Primary Consultant firm can begin work on the Project Specific Contract.



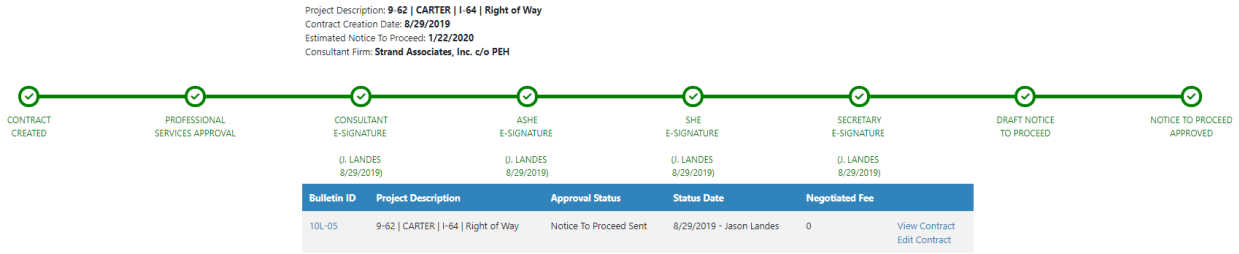
Contract Approval

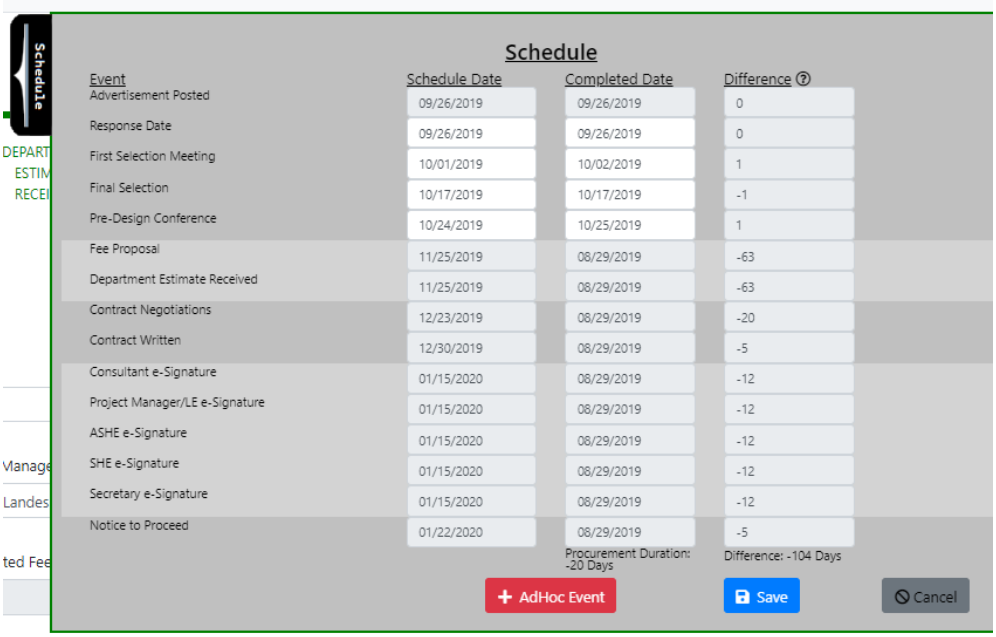


Contract Approval



Contract Approval





20 Project Specific Contract Modifications

When the Primary Consultant or KYTC determines that a Statewide Contract requires a fee increase (or decrease), a schedule adjustment or both, a Contract Modification shall be requested.

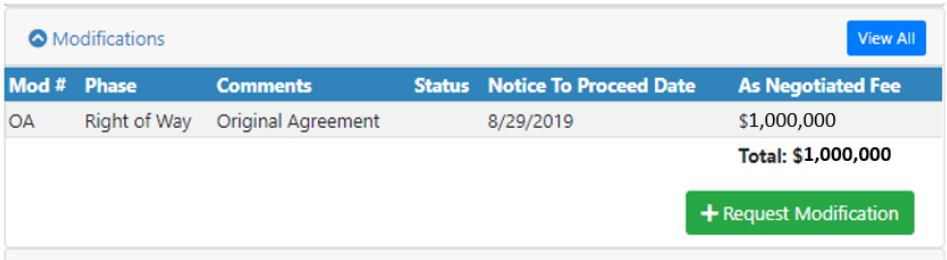
20.1 Project Specific Modification – Time Extension Only

A Project Specific Contract Modification with Time Extension Only is requested when additional time is required to complete the work.

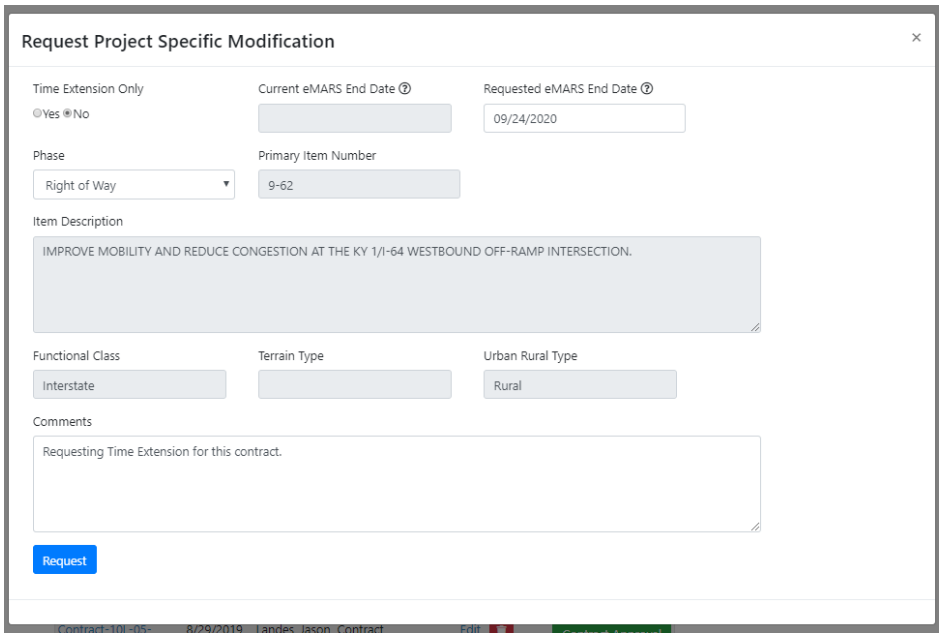
20.1.1 Request Project Specific Contract Modification – Time Extension Only

Time Extension Only Contract Mods – Request Mod – (Primary Consultant PM):

- The Primary Consultant Project Manager can begin the process of requesting a Project Specific Contract Modification by selecting the "+ Request Modification" option within the Project Specific Contract's "Modifications" tab.
    - Note: The KYTC Project Manager or KYTC Professional Service Admin may also request a Modification as needed.
- Selection of the "+ Request Modification" option shall display the "Request Project Specific Modification" pop-up window.

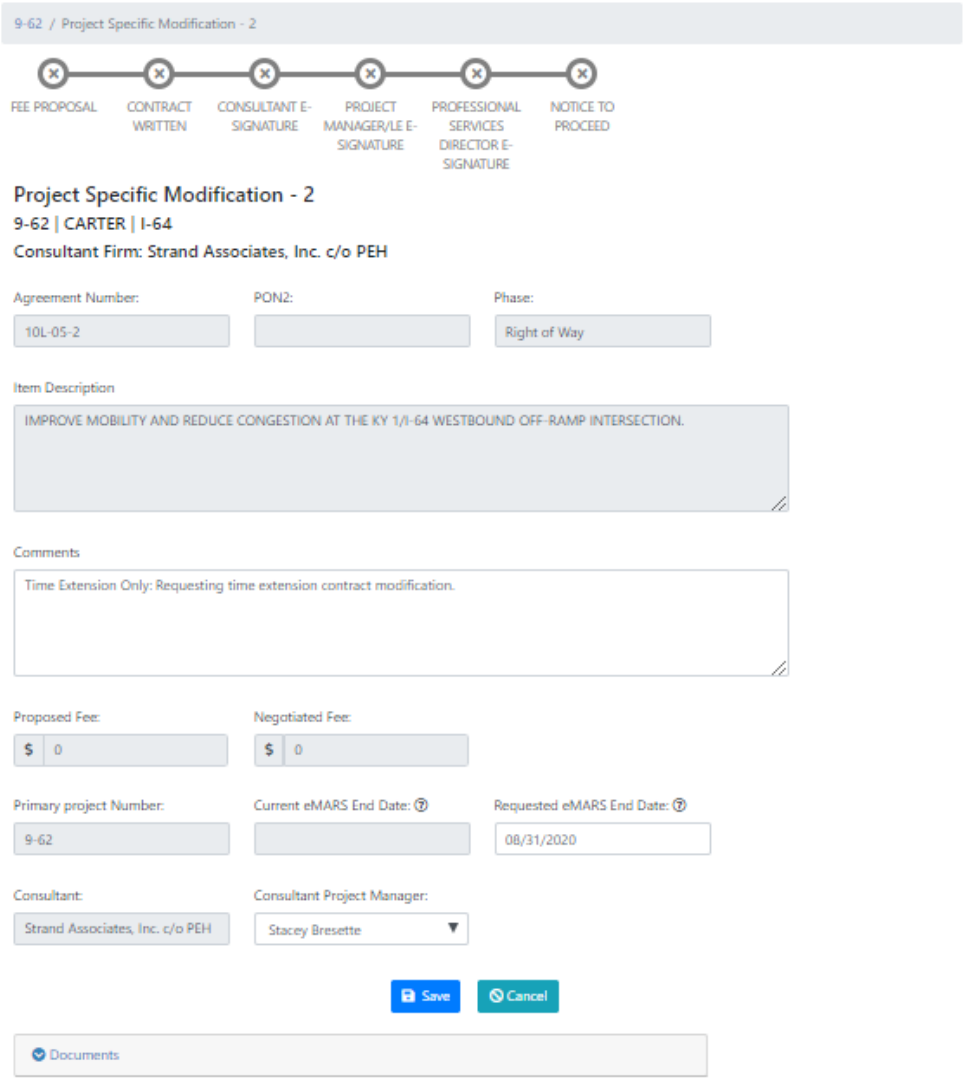


- The user is required to enter the following fields:
    - Time Extension Only
        - Toggle to "Yes" indicates a Time Extension Only Modification
    - Requested eMARS End Date
        - The Calendar shall default to +12 months from the current date of request.
    - Comments
- Selection of the "Save" option shall save the Contract Modification to the PSR2 application.
- Selection of the "Cancel" option shall NOT save the Contract Modification to the PSR2 application.



20.1.2 Project Specific Contract Modification – Time Extension Only Screen

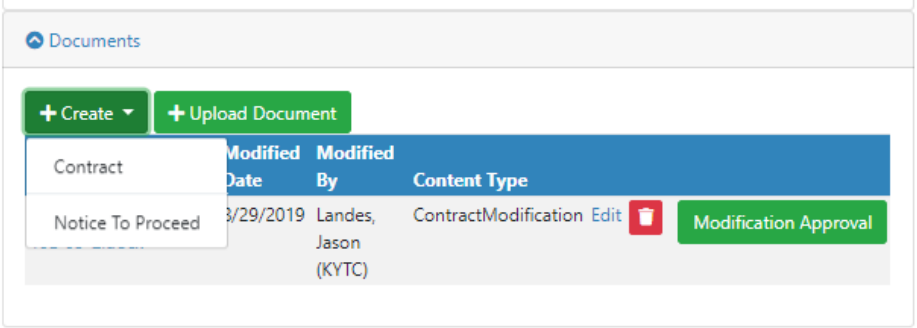
- Upon selection of the "Request" option, the user shall be navigated to the Project Specific Contract Modification – Time Extension Only screen.
- Each individual Project Specific Contract Modification screen shall display the following:
  - Project Specific Contract Modification – Time Extension Only details
  - Milestone Progress Bar
  - Schedule
  - Documents tab
- User may update the following fields as needed:
  - Comments
  - Requested eMARS End Date
  - Consultant Project Manager
- Selection of the "Save" option shall save the Contract Modification to the PSR2 application.
- Selection of the "Cancel" option shall NOT save the Contract Modification to the PSR2 application.



20.1.3 Create Draft Notice to Proceed Document

Create Draft Notice to Proceed (PSA):

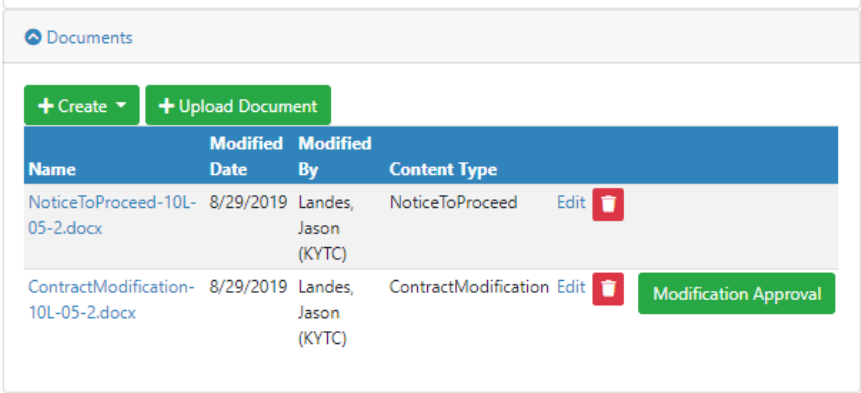
- Once the requested Contract Modification has been approved by the KYTC Professional Services group, the draft "Notice to Proceed" document shall be created.
- The KYTC Professional Services Admin shall select the "Notice to Proceed" option from the "Documents" tab to generate the draft Notice to Proceed document.
- The KYTC Professional Services Admin shall send an email notification to the Professional Services Director requesting that they review the Notice to Proceed document.



20.1.4 Approve Draft Notice to Proceed

Approve Draft Notice to Proceed Document (PS Director):

- The KYTC Professional Services Director shall review / approve the draft Notice to Proceed document.
- Upon approval of the Notice to Proceed document, the KYTC Professional Services Director shall send an email notification to the following:
    - Primary Consultant Project Manager
    - KYTC Project Manager
    - KYTC Location Engineer
    - KYTC Professional Services Admin



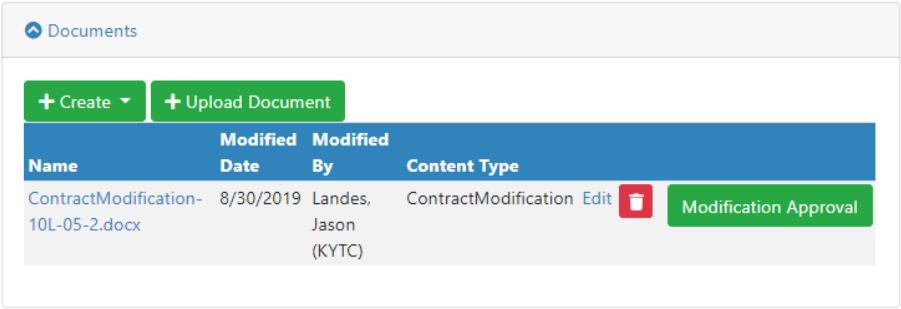
20.2 Project Specific Modification – Time Extension Only Document Approval

The Project Specific Contract Modification document approval process allows for electronic signatures (e-signatures) within the PSR2 application. Both Consultant and KYTC approvers will be sent email notifications requesting that their approval / e-signature is required on the given contract modification. Upon receipt of all required e-signatures, the Professional Services group will create the Notice to Proceed document for the Contract Modification.

20.2.1 Create Draft Project Specific Contract Modification – Time Extension Only Document

Contract Modification Document Approval – Create Draft Contract (Professional Services Admin):

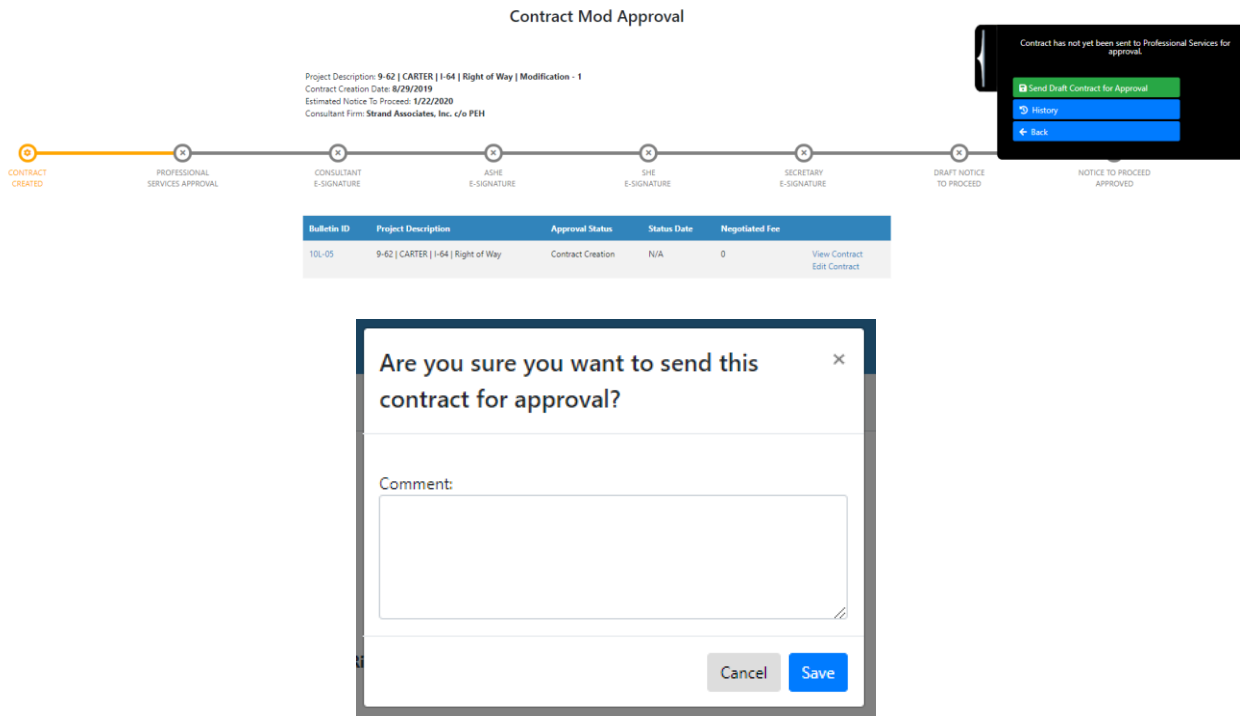
- Upon acceptance of the **"Negotiated Amounts"** Estimates step, the KYTC Professional Services Admin (PSA) will create a draft Contract Modification document and begin the Contract Modification document approval process.
- The KYTC PSA will select the "Contract" option from the "Documents" tab within the Project Specific Contract Modification screen.
- Upon creation of draft Contract Modification document, the KYTC PSA or Primary Consultant Project Manager shall select the "Modification Approval" option that will navigate the user to the "Contract Mod Approval" screen to begin the approval process.



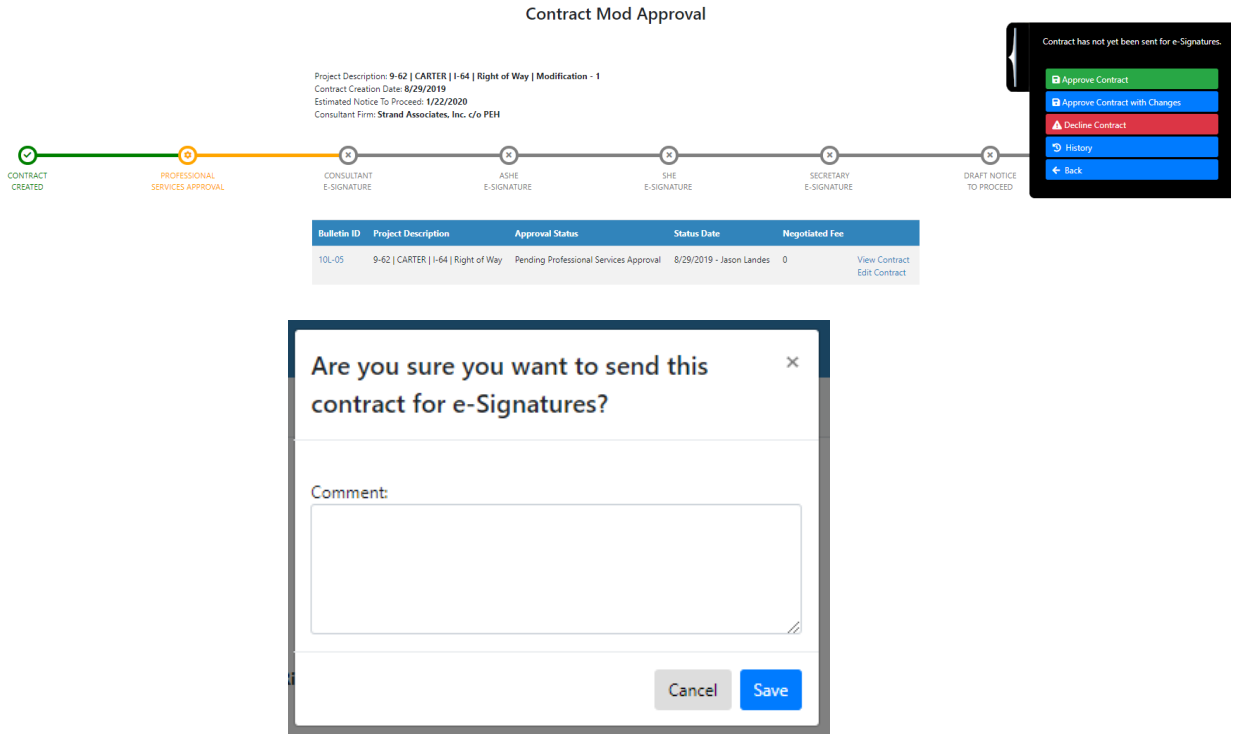
20.2.2 Approve Draft Contract Modification – Time Extension Only Document

Upon selection of the "Modification Approval" option in the "Documents" tab within the Project Specific Contract Modification screen, the user is navigated to the "Contract Mod Approval" screen

- The user begins the Contract Modification document approval process by selecting the "Send Draft Contract for Approval" option within the fly-out on the right side of the page.
    - PSR2 system sends an email approval request to the KYTC Professional Services Admin.



- Upon receipt of the email approval request, the KYTC PSA selects a link that navigates them to "Contract Mod Approval" screen.
- The KYTC PSA user shall review the draft Contract Modification document and make necessary edits.
- During review, the KYTC PSA user may select one of the following options within the fly-out on the right side of the page.
    - Approve Contract
    - Approve Contract with changes
    - Decline Contract
- Upon approval of the draft Contract Modification, the KYTC PSA user selects the "Approve Contract" option to begin the Contract Modification e-Signature process.
    - PSR2 system sends an email approval request to the following:
        - Primary Consultant Project Manager
        - KYTC Assistant State Highway Engineer (ASHE)
            - **Note: The PSR2 version of the application will bypass this approval step. The application user interface will be updated in Release 3 of this application.**
        - KYTC State Highway Engineer (SHE)
            - **Note: The PSR2 version of the application will send an email approval request to the KYTC Project Manager. The application user interface will be updated in Release 3 of this application.**
        - KYTC Secretary
            - **Note: The PSR2 version of the application will send an email approval request to the KYTC Professional Services Director. The application user interface will be updated in Release 3 of this application.**



- Upon receipt of the email approval request, the given user selects a link that navigates them to "Contract Mod Approval" screen.
    - The requested approver shall see the following options within the fly-out on the right side of the page:
        - e-Sign Contract
        - Approve Contract with changes
        - Decline Contract
    - Contract Modification approvals are done simultaneously
    - A Project Specific Contract Modification is considered approved once all of the required e-Signatures are captured by the PSR2 application.

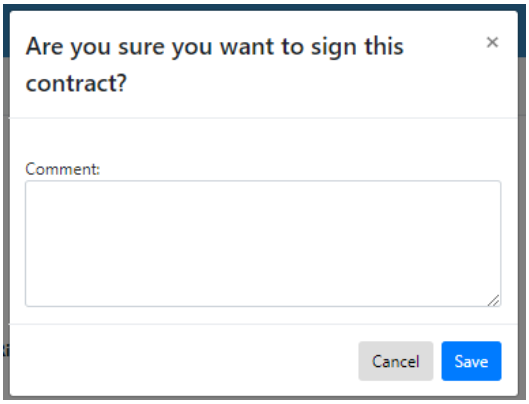
Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

CONTRACT CREATED — PROFESSIONAL SERVICES APPROVAL — CONSULTANT E-SIGNATURE — ASHE E-SIGNATURE — SHE E-SIGNATURE — SECRETARY E-SIGNATURE — DRAFT NOTICE TO PROCEED

Contract awaiting e-Signatures.
- e-Sign Contract
- Approve Contract with Changes
- Decline Contract
- History
- Back

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract



Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

CONTRACT CREATED — PROFESSIONAL SERVICES APPROVAL — CONSULTANT E-SIGNATURE (J. LANDES 8/29/2019) — ASHE E-SIGNATURE — SHE E-SIGNATURE — SECRETARY E-SIGNATURE — DRAFT NOTICE TO PROCEED — NOTICE TO PROCEED APPROVED

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract

Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

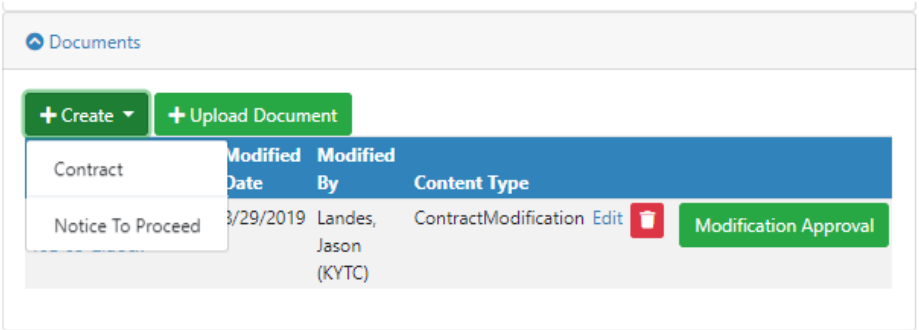
CONTRACT CREATED — PROFESSIONAL SERVICES APPROVAL — CONSULTANT E-SIGNATURE (J. LANDES 8/29/2019) — ASHE E-SIGNATURE (J. LANDES 8/29/2019) — SHE E-SIGNATURE — SECRETARY E-SIGNATURE — DRAFT NOTICE TO PROCEED — NOTICE TO PROCEED APPROVED

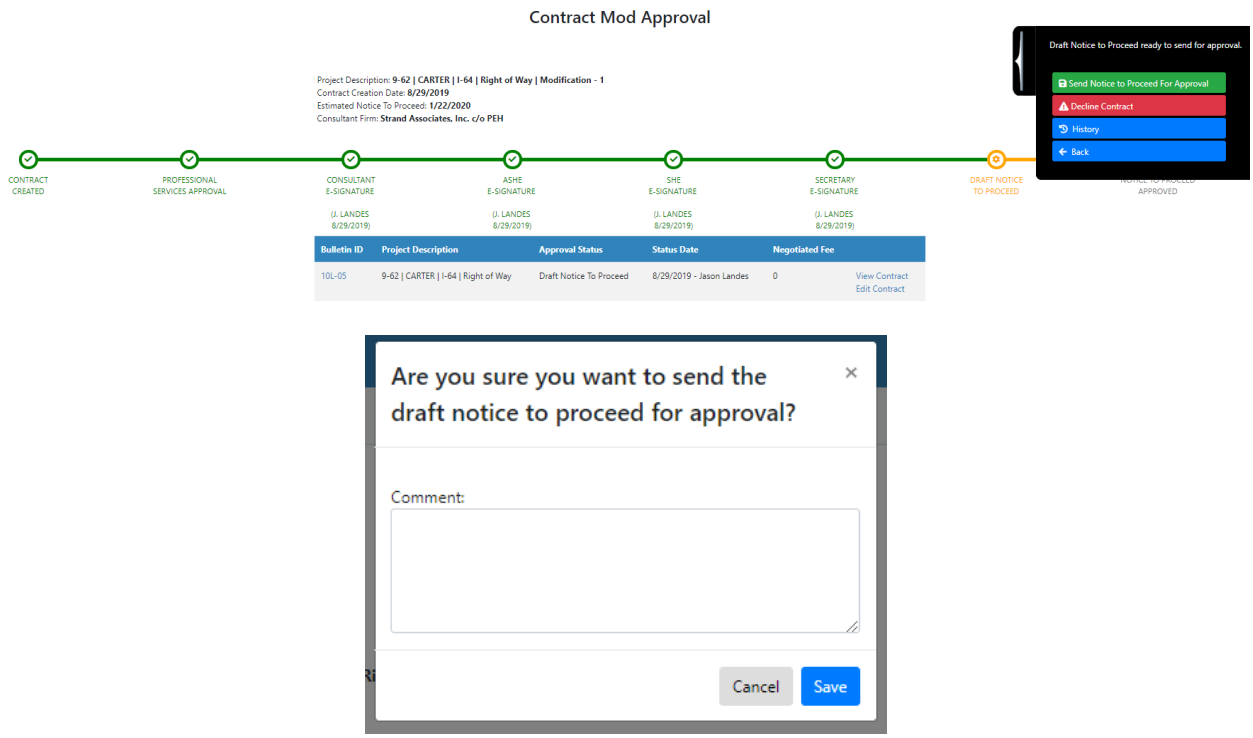
Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract

20.2.3 Create Draft Notice to Proceed Document

Contract Modification Document Approval – Create Draft Notice to Proceed (PSA Admin)

- Once all required contract e-Signatures are captured, the Notice to Proceed document can be created that indicates that the Primary Consultant firm can begin work on the contract.
- The KYTC Professional Services Admin shall generate the draft Notice to Proceed document
- KYTC PSA user selection of the "Notice to Proceed" option under the "Create" dropdown within the "Documents" tab shall generate the draft Notice to Proceed document.
- Upon selection of the "Send Notice to Proceed for Approval" fly-out option on the right side of the "Contract Approval" screen, an email notification is sent to the KYTC Professional Services Director to review the draft Notice to Proceed document.

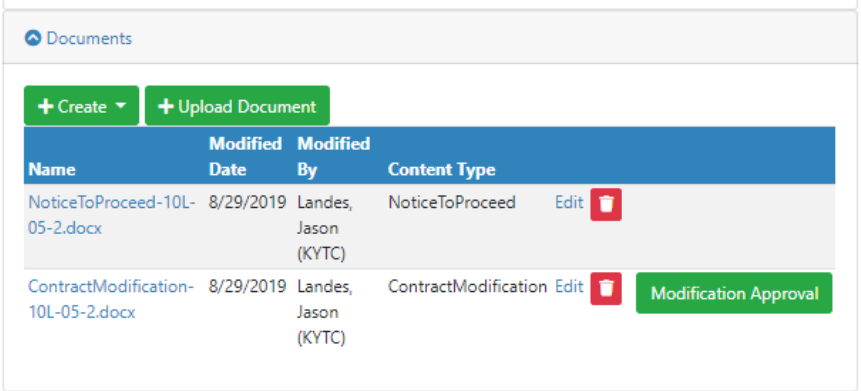




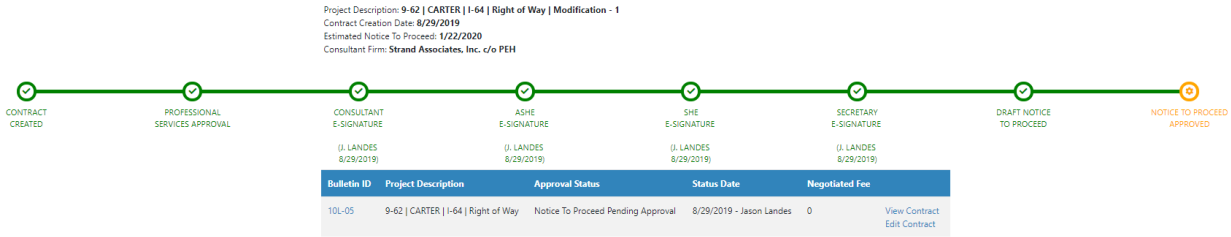
20.2.4 Approve Draft Notice to Proceed Document

Contract Modification Document Approval – Approve Notice to Proceed (KYTC PS Director)

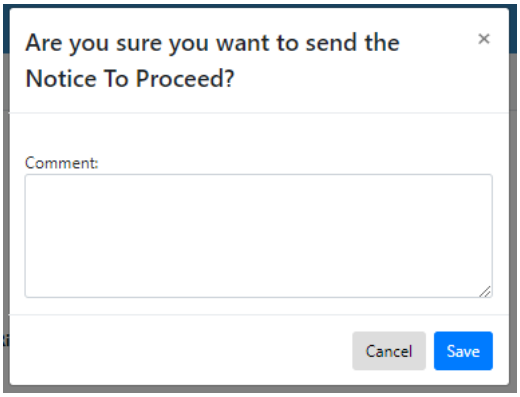
- Upon receipt of the email approval request, the KYTC Professional Services Director shall select a link that navigates them to “Contract Approval” screen.
- The KYTC Professional Services Director shall review / approve the draft Notice to Proceed document.
- Upon approval of the Notice to Proceed document, the Professional Services Director shall select the “Send Notice to Proceed Notification” fly-out option on the right side of the “Contract Approval” screen to send an email notification to the following:
    - Prime Consultant Project Manager
    - KYTC Project Manager
    - KYTC Location Engineer
    - KYTC Professional Services Admin
- Receipt of this email notification shall indicate that the Primary Consultant firm can begin work on the Project Specific Contract.



Contract Mod Approval



Contract Mod Approval



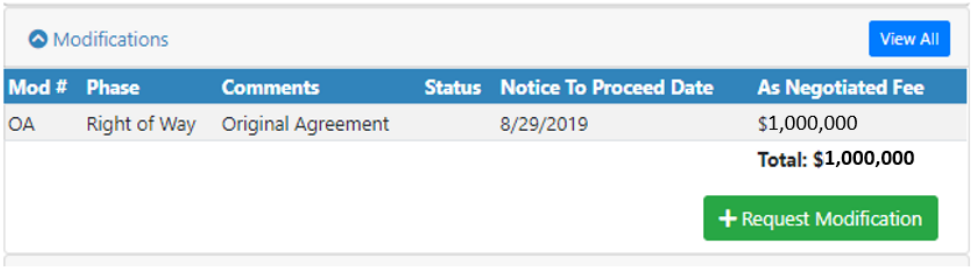
20.3 Project Specific Modification with Fee

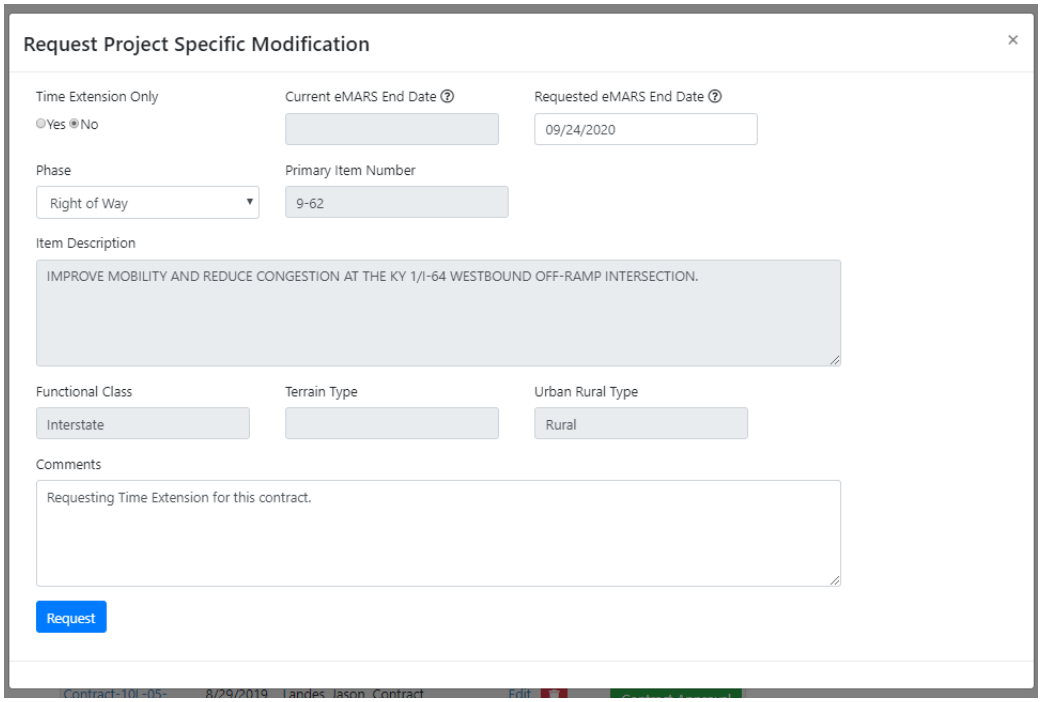
A Project Specific Contract Modification with Fee can be requested when a fee increase (or decrease) is required. Additional time may also be requested in this type of Modification.

20.3.1 Request Project Specific Contract Modification with Fee

Request Project Specific Contract Modification with Fee (Primary Consultant Project Manager:

- The Primary Consultant Project Manager can begin the process of requesting a Project Specific Contract Modification by selecting the "+ Request Modification" option within the Project Specific Contract's "Modifications" tab.
    - Note: The KYTC Project Manager or KYTC Professional Service Admin may also request a Modification as needed.
- Selection of the "+ Request Modification" option shall display the "Request Statewide Modification" pop-up window.

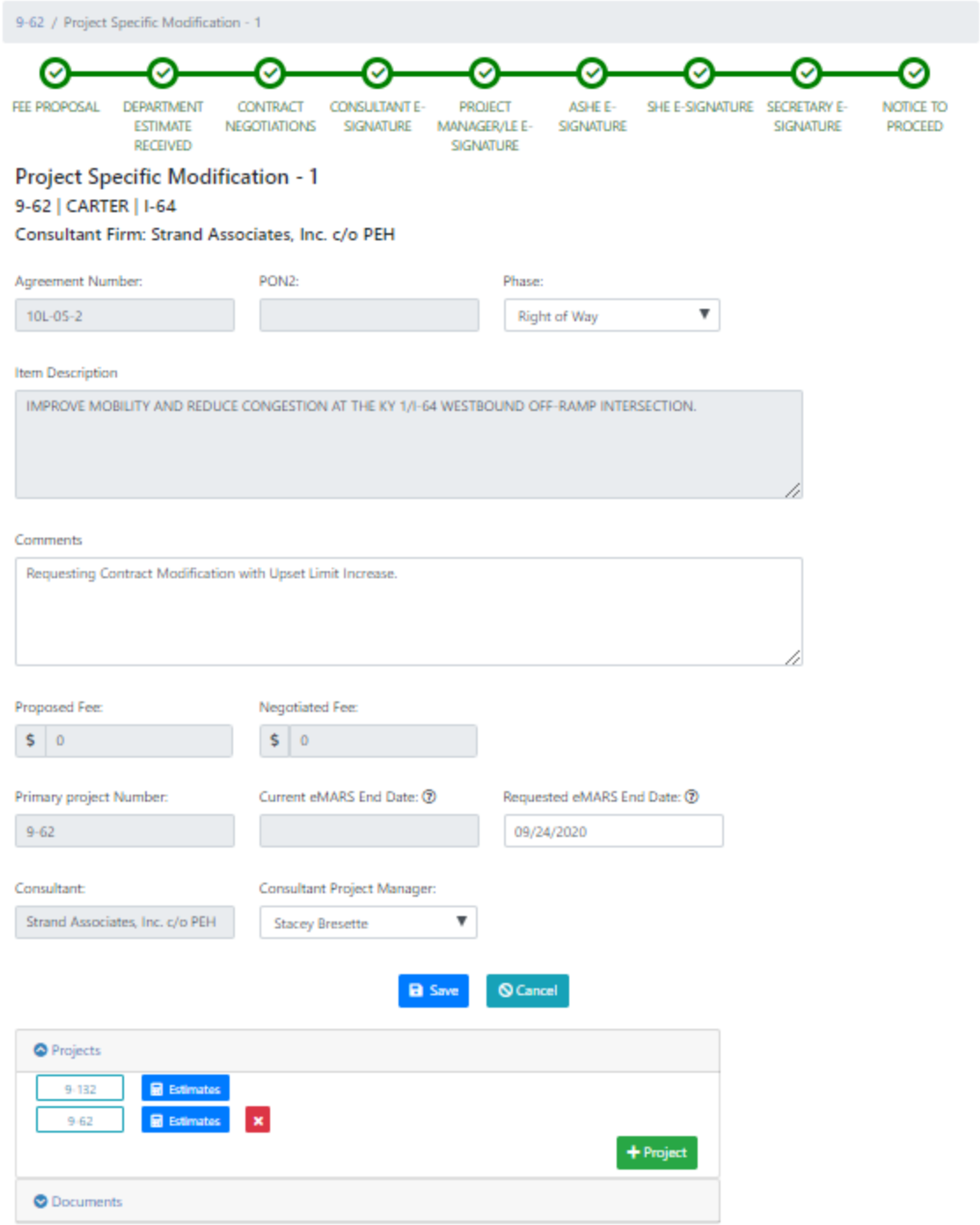




20.3.2 Project Specific Contract Modification with Fee Screen

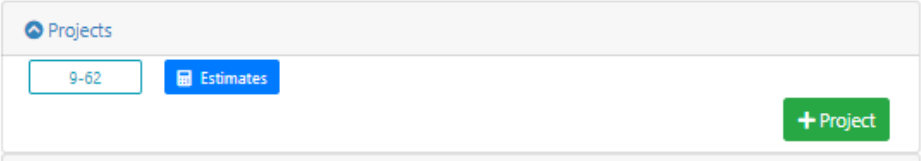
- Upon selection of the "Request" option, the user shall be navigated to the Project Specific Contract Modification with Fee screen.

- Each individual Project Specific Contract Modification screen shall display the following:
    - Statewide Contract Modification with Fee details
    - Milestone Progress Bar
    - Schedule
    - Projects Tab
    - Documents tab
- User may update the following fields as needed:
    - Phase
    - Comments
    - Requested eMARS End Date
    - Consultant Project Manager
- Selection of the “Save” option shall save the Contract Modification to the PSR2 application.
- Selection of the “Cancel” option shall NOT save the Contract Modification to the PSR2 application.

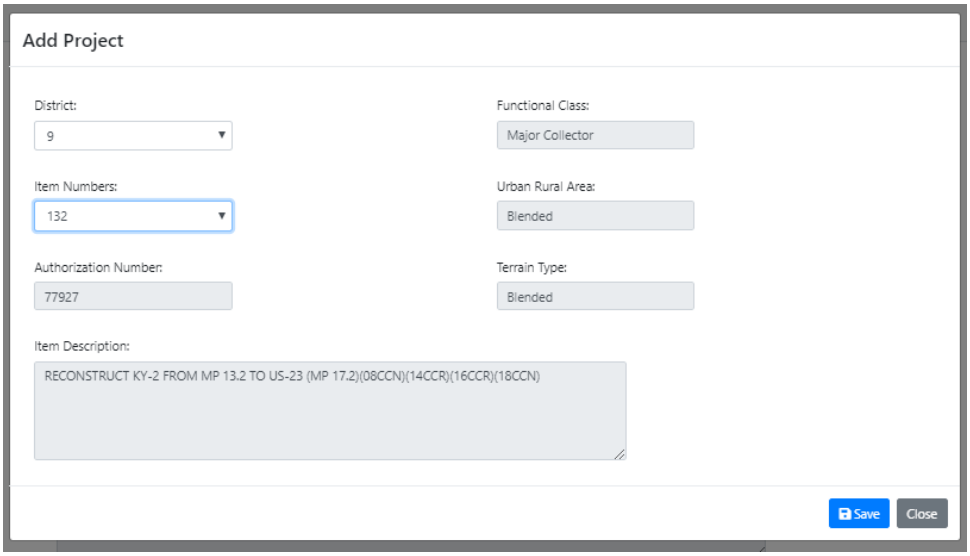


20.3.3 Add a Project to a Project Specific Contract Modification with Fee

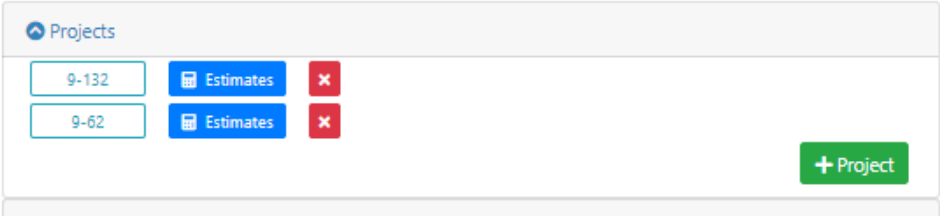
- An additional Project can be added to a Project Specific Contract Modification with Fee by selecting the "+ Project" option within the "Projects" tab.
- User shall see the "Add Project" pop-window displayed.



- User shall be able to enter the following fields:
  - District
  - Item Numbers (populates based on “District” field value)
  - Authorization Number (populates based on “Item Numbers” field value)
  - Item Description (populates based on “Item Numbers” field value)
  - Functional Class (populates based on “Item Numbers” field value)
  - Urban Rural Area (populates based on “Item Numbers” field value)
  - Terrain Type(populates based on “Item Numbers” field value)
- User selection of the “Save” option shall add the new Project to the Project Specific Contract Modification.
  - New Projects shall be displayed in the “Projects” tab.
- User selection of the “Close” option shall NOT add the new Project to the Project Specific Contract Modification.



- User selection of the “Save” option shall add the new Project to the Project Specific Contract Modification.
  - New Projects shall be displayed in the “Projects” tab.
- User selection of the “Close” option shall NOT add the new Project to the Project Specific Contract Modification.



20.4 Project Specific Contract Modification – Estimates

The PSR2 Contract Modification Estimates interface provides a central location to collect Production Hour Estimates for Project Specific Contract Modifications. This allows for the submission of consistent person-hour estimates, which will provide easier reporting and analysis of historical negotiated project costs and compare projects of similar scope.

The PSR2 Estimates workflow for Project Specific Contract Modifications includes the following steps:

- Submit Agreed Units
- Agreed Units Approval
- Consultant Estimates
- Submit KYTC Estimates
- KYTC Estimates Approval
- Offer Negotiated Amounts
- Accept Negotiated Amounts

To navigate to the desired Estimates worksheet:

- User opens the Project Specific Contract from the Dashboard.
- User selects the “Details” option next to the desired Contract Modification within the “Modifications” tab.
- User selects the “Estimate” option within the “Projects” tab within the Contract Modification screen.
- User navigates to “Estimates” screen.
- User selects “Estimate Worksheet” type.
- Selected Estimate Worksheet displays (e.g. Highway Design, Right of Way, etc.).

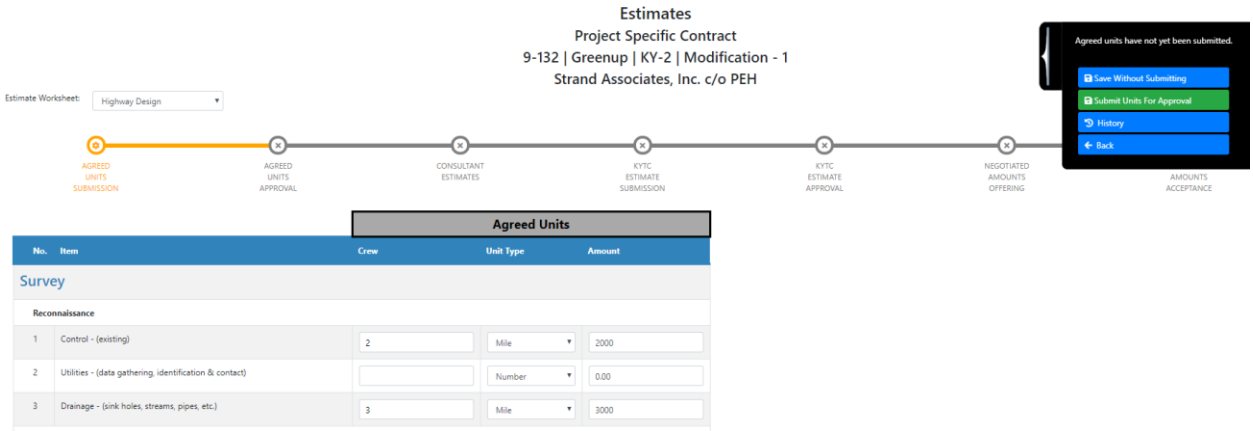
20.4.1 Modification Estimates – Submit Agreed Units

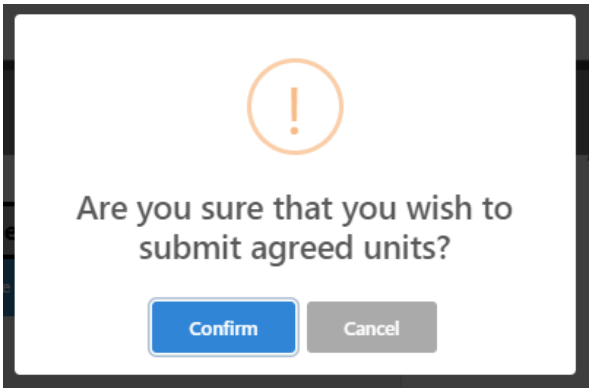
The first step in the Estimates process is for the Primary Consultant Project Manager to enter and submit “Agreed Units” in the Estimates worksheet.

Please note: The PSA can also enter and submit Agreed Units on behalf of the Consultant. In addition, the Project Manager (Central Office), Project Manager (District) and Location Engineer can enter in Agreed Units, but are unable to submit them.

Agreed Units Submission:

- The Consultant user enters the “Crew” value for each line item under “Agreed Units”.
    - System will pre-populate “1” as the “Crew” value for every row.
    - System will display a blank cell for “Crew” if the value is “1”.
    - System will pre-populate “Unit Type” from the “Estimate Items” type table.
- The Consultant user can select the appropriate “Unit Type” if it is different from the pre-populated value.
- The Consultant user can enter the "Amount" for appropriate line items.
- The Consultant user can add “Miscellaneous” line items for each Sub-Category marked “Miscellaneous”
    - The Consultant user is unable edit the “No” field.
- The Consultant user selection of the fly-out on the right side of the page shall expand to display the following options:
    - Save Without Submitting
        - An authenticated user can select the “Save without submitting” option to save the current estimate worksheet without submitting.
        - User should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
    - Submit Units for Approval
        - An authenticated user can select the “Submit Units for Approval” option to submit the agreed units for approval.
        - User should see a confirmation box - "Are you sure that you wish to submit Agreed Units? “
        - Upon submittal, the KYTC Project Manager shall receive an email notification.
    - History
        - An authenticated user can select “History” from fly-out to view a timestamp of submission including the user name.
    - Back
        - An authenticated user can select “Back” to return to Contract screen.





20.4.2 Modification Estimates – Agreed Units Approval

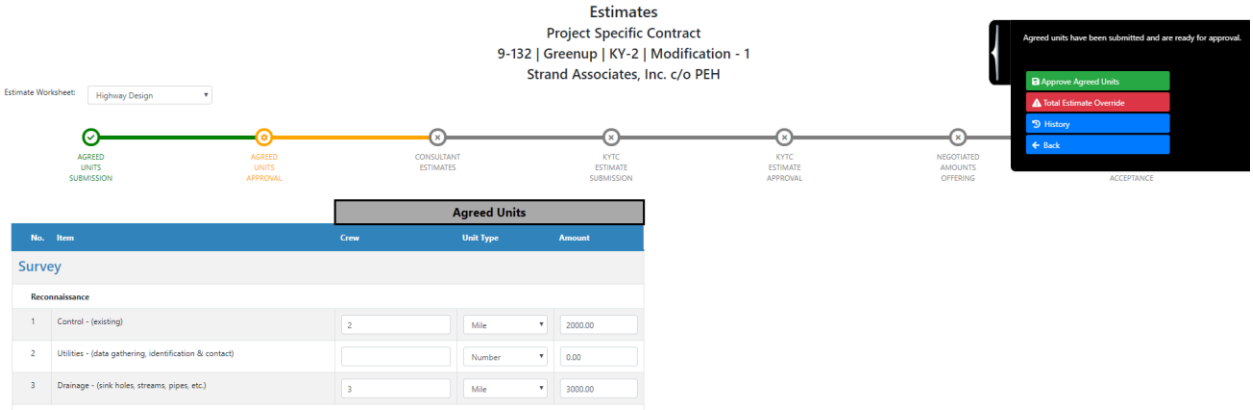
The next step in the Estimates process is for KYTC to approve the submitted Agreed Units. Typically, this step is completed by the KYTC District Project Manager, but can also be completed by the KYTC District Branch Manager or the KYTC Location Engineer.

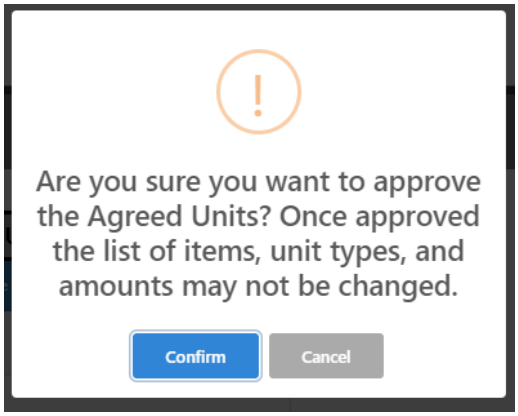
Agreed Units Approval:

- The KYTC user opens the Estimates Worksheet to begin “Agreed Units Approval”.
- The KYTC user can edit the “Crew” value for each line item.
    - System will pre-populate “1” as the “Crew” value for every row.
    - System will display a blank cell for “Crew” if the value is “1”.
    - System will pre-populate “Unit Type” from the “Estimate Items” type table.
- The KYTC user can edit the appropriate “Unit Type” if it is different from the pre-populated value.
- The KYTC user can edit the "Amount" for appropriate line items.
- The KYTC user can edit “Miscellaneous” line items for each Sub-Category marked “Miscellaneous”.
    - The KYTC user is unable to edit the “No” field.
- Upon edit of any field, a dialog box will display – “You are about to change previously submitted agreed unit valued. Once Saved, old values will be overwritten.”
- The KYTC user can expand the fly-out on the right side of the page to see the following options:
    - Approve Agreed Units
        - The KYTC user can select the “Approve Agreed Units” option.
        - The KYTC user should see a confirmation box - "Are you sure you want to approve the Agreed Units? Once approved, the list of "Items", "Unit Types" and "Amounts" may not be changed"
        - The KYTC user cannot make updates to "Item", "Crew", "Unit Type" and "Amount" after "Agreed Units" Approval.
            - Only users on the "Estimates Overrides" exception list will be allowed to update these values after approval
        - After “Agreed Units” are approved, the KYTC user can see that all items where:
            - “Amount” = 0 should be hidden
            - Sub-Categories with no items are hidden

        - All Categories with no sub-categories are hidden
    - Upon approval of “Agreed Units” values, the Primary Consultant Project Manager shall receive an email notification.
- Save Without Submitting
    - The KYTC user can select the “Save without submitting” option to save the current estimate worksheet without submitting.
        - The KYTC user should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
- History
    - The KYTC user can select “History” from fly-out to view a timestamp of submission including the user name.
- Back

  The KYTC user can select “Back” to return to Contract screen.





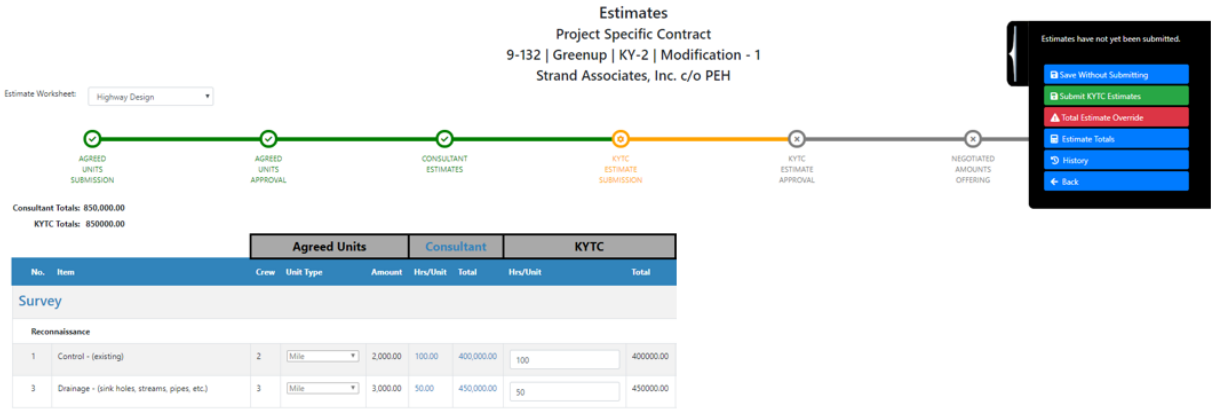
20.4.3 Modification Estimates – Consultant Estimates

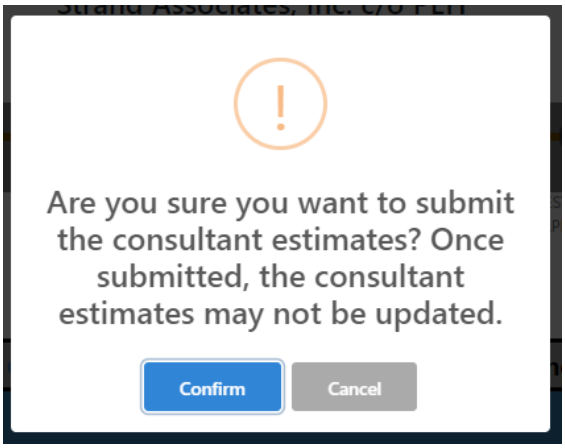
The next step in the contract negotiation process is for the Primary Consultant Project Manager to enter estimates for "Hrs. /Unit" values.

Enter Consultant Estimates:

- The Consultant user can see the “Agreed Units” and “Consultant Estimates” columns.
- The Consultant user can enter Consultant Estimate "Hrs. /Unit" values for each row.

- The Consultant user can expand the fly-out on the right side of the page to see the following options:
  - Save Without Submitting
    - The Consultant user can select the "Submit Consultant Estimates" option.
    - The Consultant user should see a confirmation box - "Are you sure you want to submit the Consultant Estimates? Once submitted, the Consultant Estimates may not be updated".
  - Submit Consultant Estimates
    - The Consultant user can select the “Save without submitting” option to save the current estimate worksheet without submitting.
    - The Consultant user should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
    - Upon submittal of “Consultant Estimates” values, they KYTC Project Manager, KYTC Location Engineer and KYTC PSA shall receive email notifications.
  - History
    - An authenticated user can select “History” from fly-out to view a timestamp of submission including the user name.
  - Back
    - An authenticated user can select “Back” to return to Contract screen.





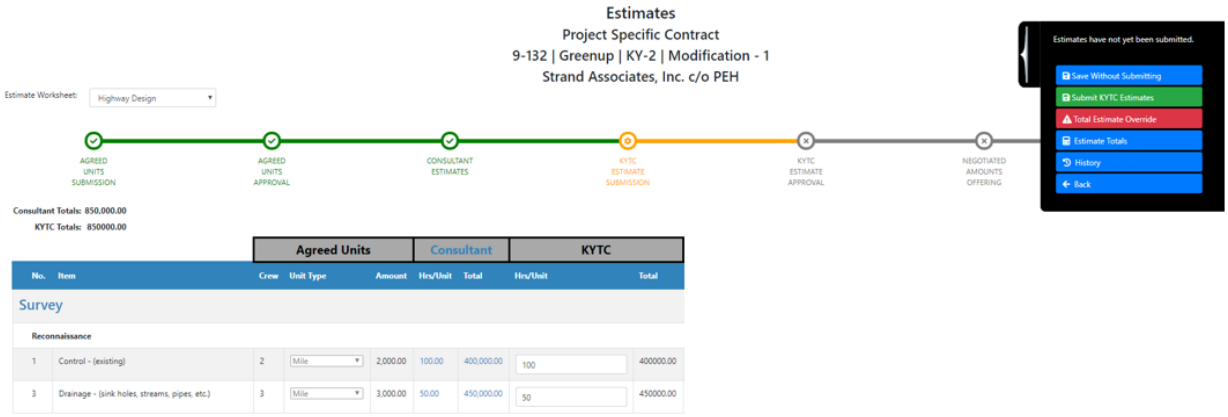
20.4.4 Modification Estimates – Submit KYTC Estimates

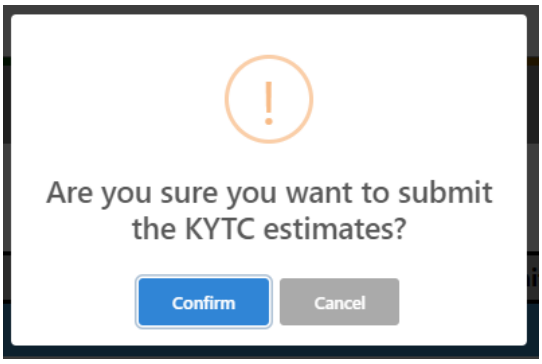
This step allow the KYTC Project Manager to enter / submit Estimates for "Hrs. /Unit" values.

Note: If the Consultant Estimate is under 500 hours, the DBM / PM, LE or PSA shall immediately see a dialog box upon entry of the Estimates screen – "The consultant firm has submitted as estimate totaling less than 500 hours. Would you like to copy those values to your KYTC estimate? You will have the chance to edit these values before submission."

Submit KYTC Estimates:

- The KYTC user can view the "Agreed Units" and "KYTC Estimates" columns.
- The KYTC user can enter KYTC Estimates "Hrs. /Unit" values for each row.
- The KYTC user can expand the fly-out on the right side of the page to see the following options:
    - Save Without Submitting
        - The KYTC user can select the "Save without submitting" option to save the current estimate worksheet without submitting.
        - User should see a confirmation box – "Value will be saved but not submitted. Please remember to submit these values once finished."
    - Submit KYTC Estimates
        - The KYTC user can select the "Submit KYTC Estimates" option to submit the worksheet for approval.
        - The KYTC user shall see a dialog box – "Are you sure you want to submit the KYTC estimates?"
        - Upon submittal of "KYTC Estimates" values, the KYTC Location Engineer shall receive an email notification.
    - Total Estimate Override (Only for PSA role)
        - The KYTC PSA can select the "Total Estimate Override" option.
        - The KYTC PSA should see a confirmation box – "All approvals for this worksheet will be reset. Do you wish to proceed?"
        - The KYTC PSA selection of this option shall reset the Estimate Worksheet to the "Agreed Units Submission" step.
    - History
        - The KYTC user can select "History" from fly-out to view a timestamp of submission including the user name.
    - Back
        - An authenticated KYTC user can select "Back" to return to Contract screen.





20.4.5 Modification Estimates – KYTC Estimates Approval

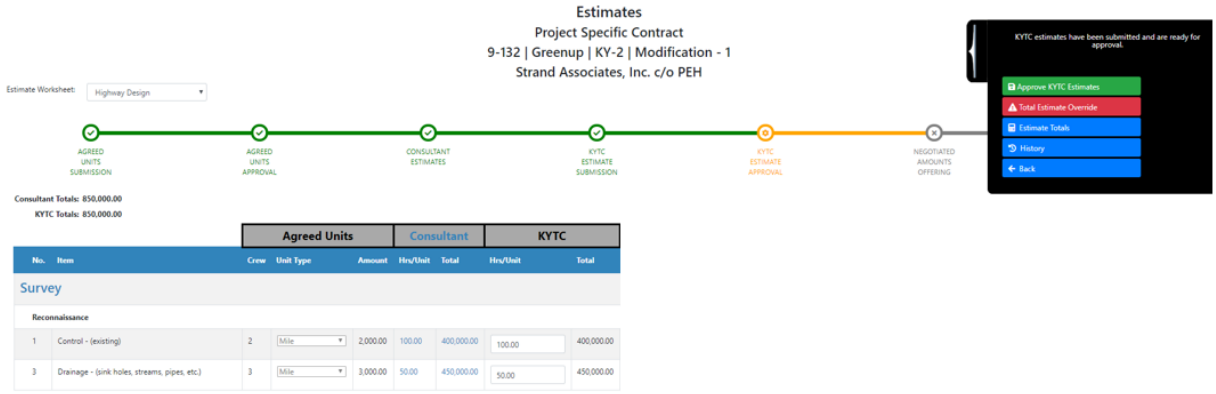
The KYTC Location Engineer can approve KYTC Estimates for "Hrs. /Unit" values to progress the Estimates process.

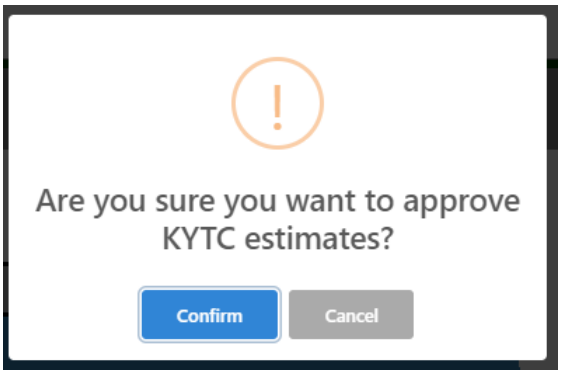
Approve KYTC Estimates:

- The KYTC Location Engineer can see the “Agreed Units”, “Consultant” and “KYTC” columns.
- The KYTC Location Engineer enters KYTC Estimates Approval "Hrs. /Unit" values for each row.
    - Upon value edit, a confirmation box will open – “You are about to change previously submitted KYTC estimate values. If you continue, estimate approval progress will be reset.”
    - The KYTC Location Engineer selection of “Confirm” option shall take user back to the KYTC Estimate Submission.
- The KYTC Location Engineer can expand the fly-out on the right side of the page to see the following options:
    - Approve KYTC Estimates
        - The KYTC Location Engineer can select the “Approve KYTC Estimates” option to submit the worksheet for approval.
        - User shall see a dialog box – “Are you sure you want to approve KYTC estimates?”
        - Upon approval of the “KYTC Estimates” values, the Primary Consultant Project Manager and KYTC Project Manager shall email notifications.
    - Total Estimate Override (Only for PSA role)
        - The KYTC PSA can select the “Total Estimate Override” option.

- The KYTC PSA should see a confirmation box – “All approvals for this worksheet will be reset. Do you wish to proceed?”
- The KYTC PSA selection of this option shall reset the Estimate Worksheet to the “Agreed Units Submission” step.

- History
  - An authenticated KYTC user can select “History” from fly-out to view a timestamp of submission including the user name.
- Back
  - An authenticated KYTC user can select “Back” to return to Contract screen.





20.4.6 Modification Estimates – Offer Negotiated Amounts

Once KYTC Estimates are approved, the KYTC PSA enters and submits "Negotiated Amounts" values.

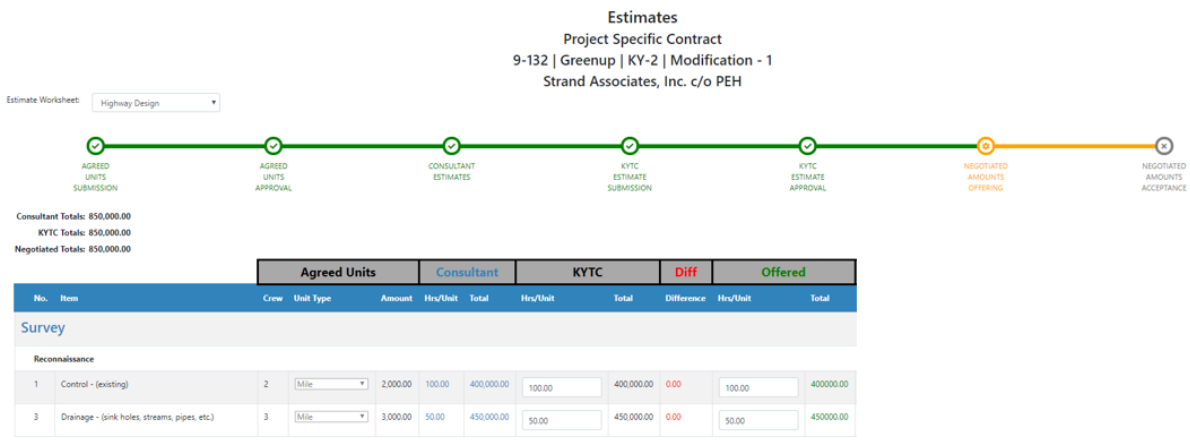
Offer Negotiated Amounts:

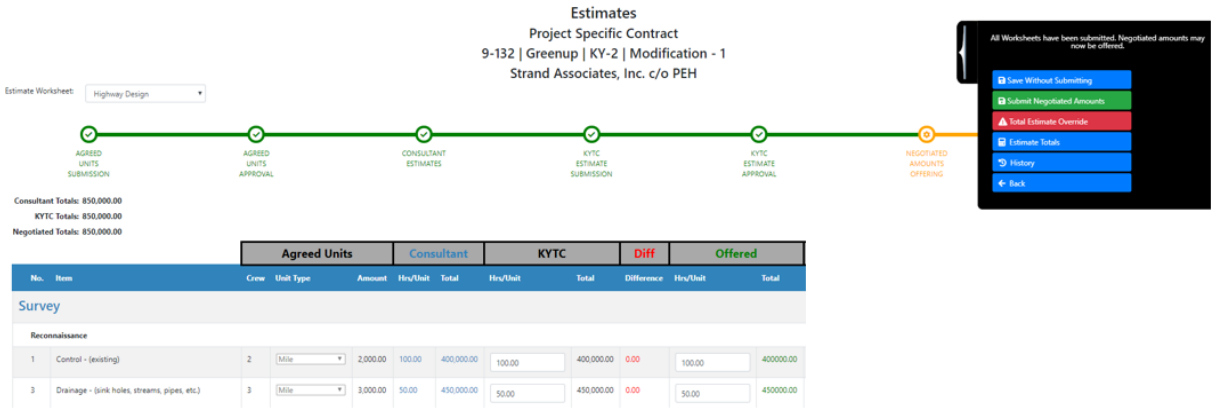
- The KYTC PSA can see the “Agreed Units”, “Consultant”, “KYTC”, “Difference”, “Offered” and “Ranges Hrs. / Unit (Min / Max) columns.
- The KYTC PSA on the “Negotiated Amounts Offerings” Estimates step should see the "Negotiated Hrs. /Unit" with the values from the "Consultant Hrs. /Unit" if the "Negotiated Hrs. /Unit" values are blank.
- The KYTC PSA should see that the "Offered Hrs. /Unit" values are highlighted when they are not equal to the "Consultant Hrs. /Unit" values.

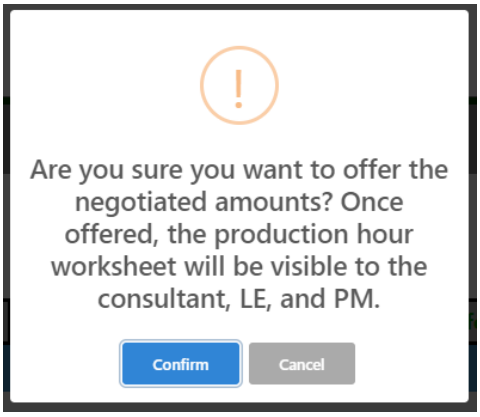
- The KYTC PSA can add/remove/edit the "Negotiated Hrs. /Unit" values for each item.
    - The KYTC PSA should see a dialog box – “You are about to change previously submitted KYTC estimate values. If you continue, estimate approval progress will be reset.”
    - The KYTC PSA selection of “Confirm” option shall return the user back to the “KYTC Estimates Submission” Estimates step.
- The KYTC PSA can expand the fly-out on the right side of the page to see the following options:
    - Submit Negotiated Amounts
        - The KYTC PSA can select the “Submit Negotiated Amounts” option to send the amounts to the consultant for approval.
            - The KYTC PSA should see a confirmation box - "Are you sure you want to offer the Negotiated Amounts? Once offered, the Production-Hour Worksheet will be visible to the consultant, LE and PM".
        - The KYTC PSA cannot offer the "Negotiated Amounts" until the Consultant Estimates are submitted AND the KYTC Estimates are approved.
            - The KYTC PSA should see an error message - "Negotiated Amounts may not be offered until the Consultant Estimates have been submitted AND the KYTC Estimates have been approved".
        - The KYTC PSA can NOT finalize the "Negotiated Amounts" until the "Negotiated Amounts" have been offered
            - User should see an error message - "Negotiated Amounts must be offered before they can be accepted"
            - Once "Negotiated Amounts" are accepted, only users on the "Estimates Overrides" exception list can update these values.
        - Upon submittal of the “Negotiated Amounts” value, the Primary Consultant Project Manager, KYTC Project Manager and KYTC Location Engineer shall receive an email notification.
    - Save Without Submitting
        - The KYTC PSA can select the “Save without submitting” option to save the current estimate worksheet without submitting.
            - The KYTC PSA should see a confirmation box – “Value will be saved but not submitted. Please remember to submit these values once finished.”
    - Total Estimate Override (Only for PSA role)
        - The KYTC PSA can select the “Total Estimate Override” option.
            - The KYTC PSA should see a confirmation box – “All approvals for this worksheet will be reset. Do you wish to proceed?”
            - The KYTC PSA selection of this option shall reset the Estimate Worksheet to the “Agreed Units Submission” step.
    - Estimate Totals
        - The KYTC PSA can select the “Estimate Totals” option that shall display the Production Hour Summary for the Estimate Worksheet:
            - Category
            - Consultant Total
            - KYTC Total

- Negotiated Total

- History
  - The KYTC PSA can select “History” from fly-out to view a timestamp of submission including the user name.
- Back
  - The KYTC PSA can select “Back” to return to Contract screen.







20.4.7 Modification Estimates – Accept Negotiated Amounts

The final step in the Estimation process is for the Primary Consultant Project Manager to accept the Negotiated Amounts. If Primary Consultant does NOT accept the Negotiated Offer, they can contact Professional Services outside of the system for Negotiation Discussions.

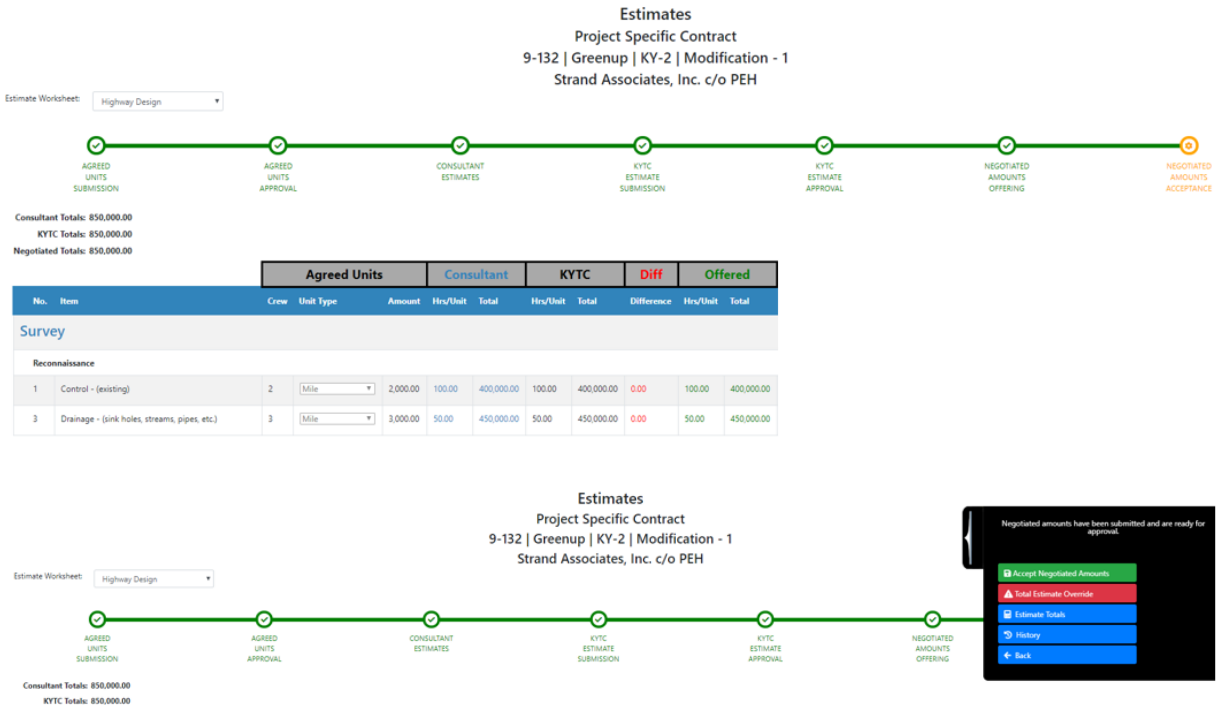
Note: A KYTC PSA role may accept Negotiated Amount on behalf of the Consultant.

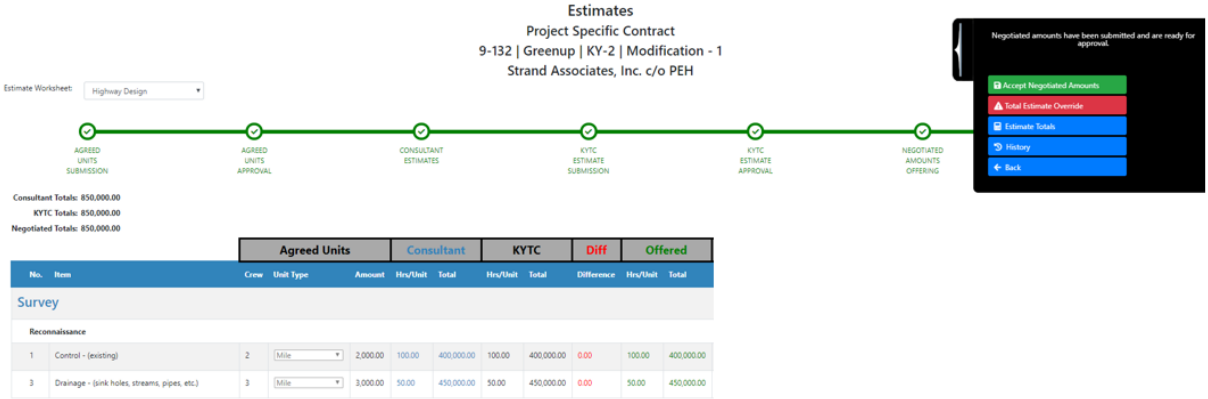
Accept Negotiated Amounts:

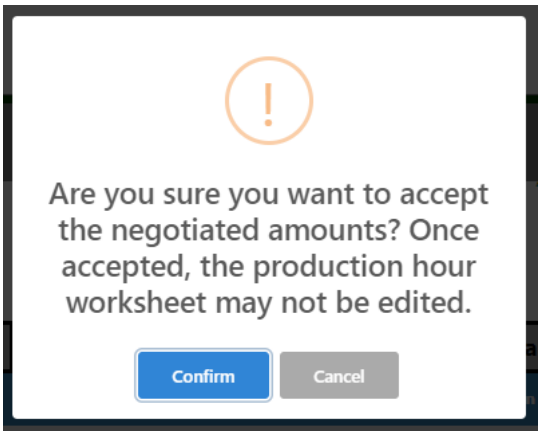
- The Consultant user can navigate to the Estimate worksheet to view the "Negotiated Amounts Acceptance" step (view only).
- The Consultant user can see the "Agreed Units", "Consultant" and "Offered" columns.
- The Consultant user can view the "Agreed Units", "Consultant Estimates", "KYTC Estimates", "Difference" and "Negotiated Amounts" only once the "Negotiated Amounts are accepted.
    - User should NOT see the far-right calculated fields (Only PSAs should see this).
- The Consultant user can expand the fly-out on the right side of the page to see the following options:
    - Accept Negotiated Amounts
        - The Consultant user can select the "Accept Negotiated Amounts" option to accept the negotiated amounts.
            - The Consultant user should see a confirmation box - "Are you sure you want to accept the Negotiated Amounts? Once Negotiated Amounts are accepted, the Production-Hour Worksheet may NOT be edited."
            - Once Negotiated Amounts are accepted, the "Offered" header should change to read "Negotiated".
            - Once Negotiated Amount are accepted, the assigned Consultant can view the "Agreed Units", "Consultant Estimates", "KYTC Estimates", "Difference" and "Negotiated Amounts".
            - The Consultant user should NOT see the far-right calculated fields (Only PSAs should see this).
            - The Consultant user shall NOT be able to edit any field on this page after "Negotiated Amounts" are accepted.

    - Estimate Totals
        - The Consultant user can select the "Estimate Totals" option that shall display the Production Hour Summary for the Estimate Worksheet:
            - Category
            - Consultant Total
            - KYTC Total
            - Negotiated Total
    - History
        - The Consultant user can select "History" from fly-out to view a timestamp of submission including the user name.

- Back
  - The Consultant user can select “Back” to return to Contract screen.







20.5 Project Specific Contract Modification Document Approval

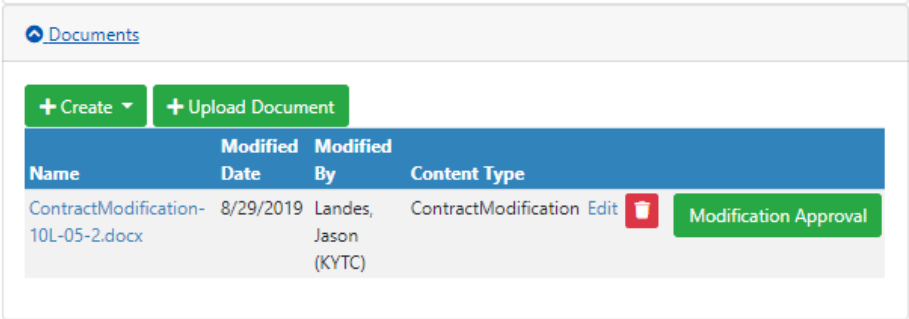
The Project Specific Contract Modification document approval process allows for electronic signatures (e-signatures) within the PSR2 application. Both Consultant and KYTC approvers will be sent email notifications requesting that their approval / e-signature is required on the given contract modification.

Upon receipt of all required e-signatures, the Professional Services group will create the Notice to Proceed document for the Contract Modification.

20.5.1 Create Draft Project Specific Contract Modification Document

Contract Modification Document Approval – Create Draft Contract (Professional Services Admin):

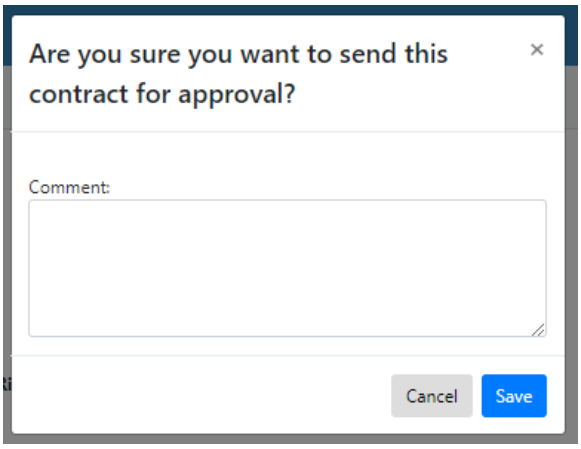
- Upon acceptance of the **"Negotiated Amounts"** Estimates step, the KYTC Professional Services Admin (PSA) will create a draft Contract Modification document and begin the Contract Modification document approval process.
- The KYTC PSA will select the "Contract" option from the "Documents" tab within the Project Specific Contract Modification screen.
- Upon creation of draft Contract Modification document, the KYTC PSA or Primary Consultant Project Manager shall select the "Modification Approval" option that will navigate the user to the "Contract Mod Approval" screen to begin the approval process.



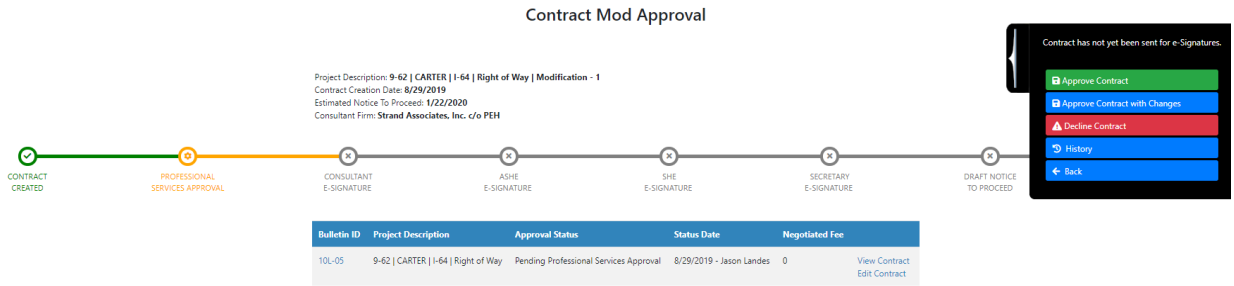
20.5.2 Approve Draft Contract Modification Document

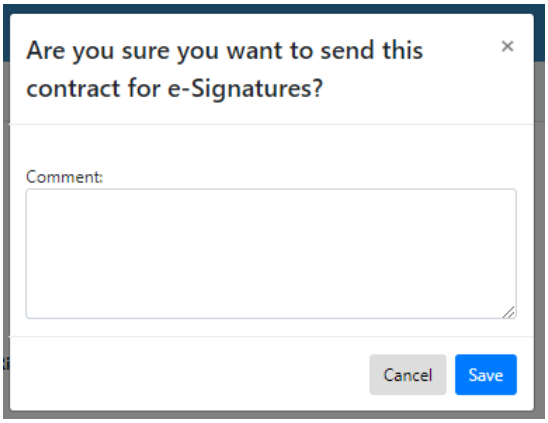
- Upon selection of the "Modification Approval" option in the "Documents" tab within the Project Specific Contract Modification screen, the user is navigated to the "Contract Mod Approval" screen.

- The user begins the Contract Modification document approval process by selecting the “Send Draft Contract for Approval” option within the fly-out on the right side of the page.
    - PSR2 system sends an email approval request to the KYTC Professional Services Admin.

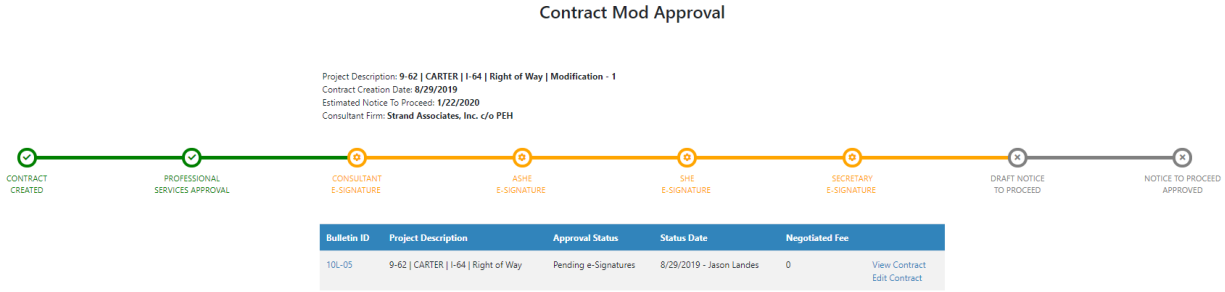


- Upon receipt of the email approval request, the KYTC PSA selects a link that navigates them to “Contract Mod Approval” screen.
- The KYTC PSA user shall review the draft Contract Modification document and make necessary edits.
- During review, the KYTC PSA user may select one of the following options within the fly-out on the right side of the page.
    - Approve Contract
    - Approve Contract with changes
    - Decline Contract
- Upon approval of the draft Contract Modification, the KYTC PSA user selects the “Approve Contract” option to begin the Contract Modification e-Signature process.
    - PSR2 system sends an email approval request to the following:
        - Primary Consultant Project Manager
        - KYTC Assistant State Highway Engineer (ASHE)
        - KYTC State Highway Engineer (SHE)
        - KYTC Secretary





- Upon receipt of the email approval request, the given user selects a link that navigates them to "Contract Mod Approval" screen.
    - The requested approver shall see the following options within the fly-out on the right side of the page:
        - e-Sign Contract
        - Approve Contract with changes
        - Decline Contract
    - Contract Modification approvals are done simultaneously
    - A Project Specific Contract Modification is considered approved once all of the required e-Signatures are captured by the PSR2 application.



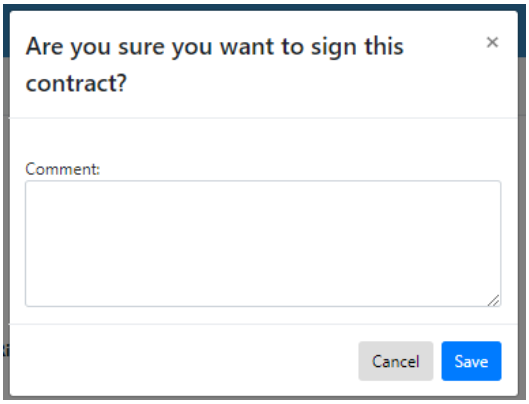
Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

CONTRACT CREATED — PROFESSIONAL SERVICES APPROVAL — CONSULTANT E-SIGNATURE — ASHE E-SIGNATURE — SHE E-SIGNATURE — SECRETARY E-SIGNATURE — DRAFT NOTICE TO PROCEED

Contract awaiting e-Signatures.
- e-Sign Contract
- Approve Contract with Changes
- Decline Contract
- History
- Back

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract



Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

CONTRACT CREATED — PROFESSIONAL SERVICES APPROVAL — CONSULTANT E-SIGNATURE (J. LANDES 8/29/2019) — ASHE E-SIGNATURE — SHE E-SIGNATURE — SECRETARY E-SIGNATURE — DRAFT NOTICE TO PROCEED — NOTICE TO PROCEED APPROVED

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract

Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

CONTRACT CREATED — PROFESSIONAL SERVICES APPROVAL — CONSULTANT E-SIGNATURE (J. LANDES 8/29/2019) — ASHE E-SIGNATURE (J. LANDES 8/29/2019) — SHE E-SIGNATURE — SECRETARY E-SIGNATURE — DRAFT NOTICE TO PROCEED — NOTICE TO PROCEED APPROVED

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract

Contract Mod Approval

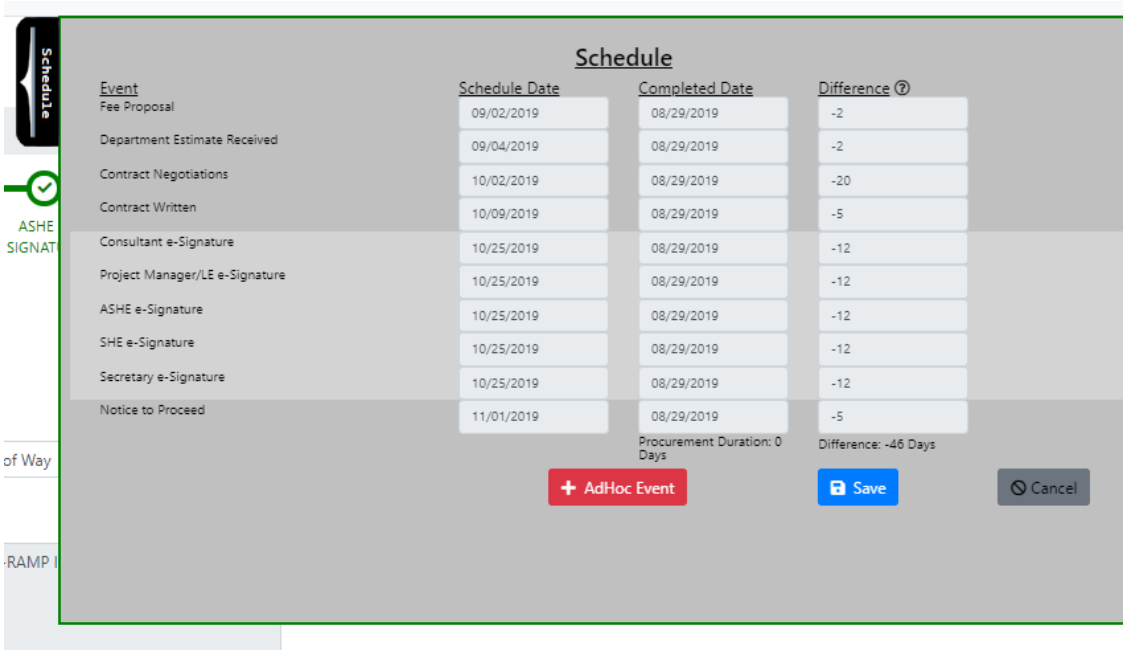
Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Pending e-Signatures	8/29/2019 - Jason Landes	0	View Contract Edit Contract

Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

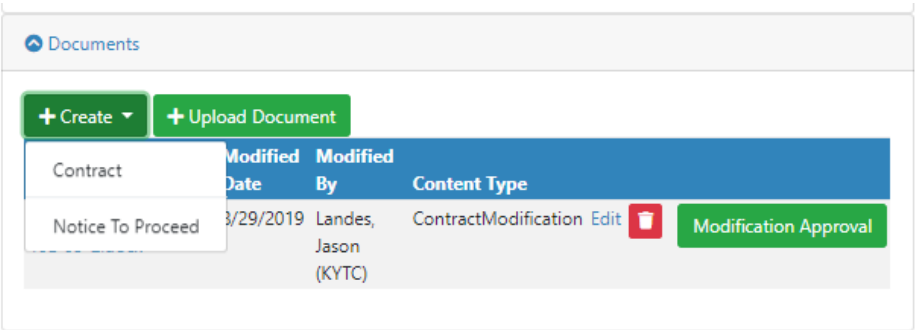
Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Notice To Proceed Sent	8/29/2019 - Jason Landes	0	View Contract Edit Contract

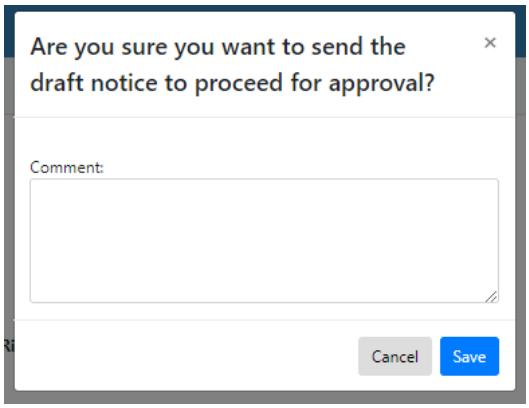


20.5.3 Create Draft Notice to Proceed Document

Contract Modification Document Approval – Create Draft Notice to Proceed (KYTC PSA)

- Once all required contract e-Signatures are captured, the Notice to Proceed document can be created that indicates that the Primary Consultant firm can begin work on the contract.
- The KYTC Professional Services Admin shall generate the draft Notice to Proceed document
- KYTC PSA user selection of the “Notice to Proceed” option under the “Create” dropdown within the “Documents” tab shall generate the draft Notice to Proceed document.
- Upon selection of the “Send Notice to Proceed for Approval” fly-out option on the right side of the “Contract Approval” screen, an email notification is sent to the KYTC Professional Services Director to review the draft Notice to Proceed document.



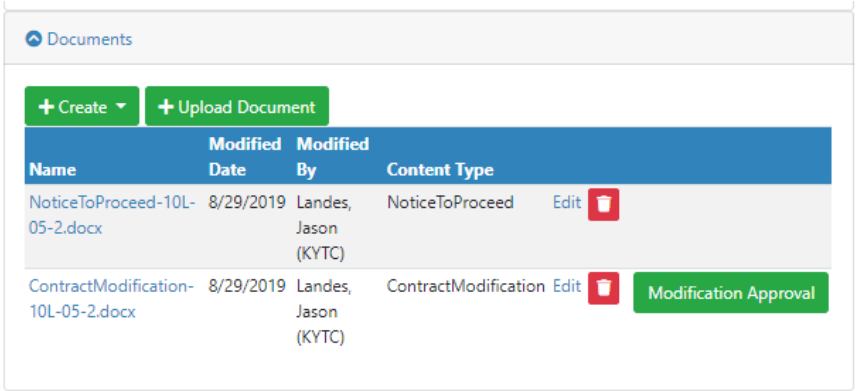


20.5.4 Approve Draft Notice to Proceed Document

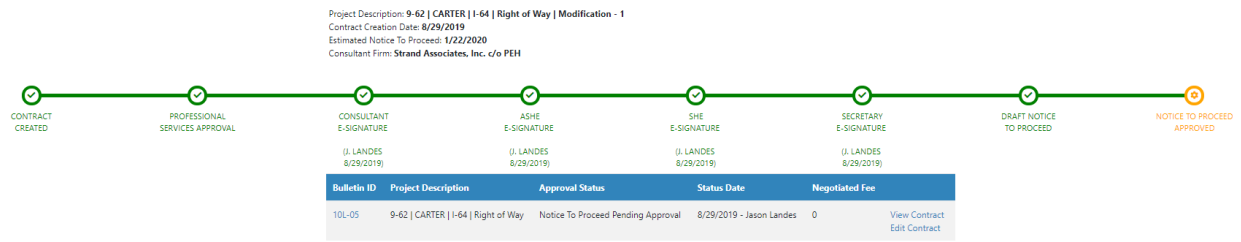
Contract Modification Document Approval – Approve Notice to Proceed (KYTC PSA Director)

- Upon receipt of the email approval request, the KYTC Professional Services Director shall select a link that navigates them to “Contract Approval” screen.
- The KYTC Professional Services Director shall review / approve the draft Notice to Proceed document.
- Upon approval of the Notice to Proceed document, the Professional Services Director shall select the “Send Notice to Proceed Notification” fly-out option on the right side of the “Contract Approval” screen to send an email notification to the following:
    - Prime Consultant Project Manager
    - KYTC Project Manager
    - KYTC Location Engineer
    - KYTC Professional Services Admin

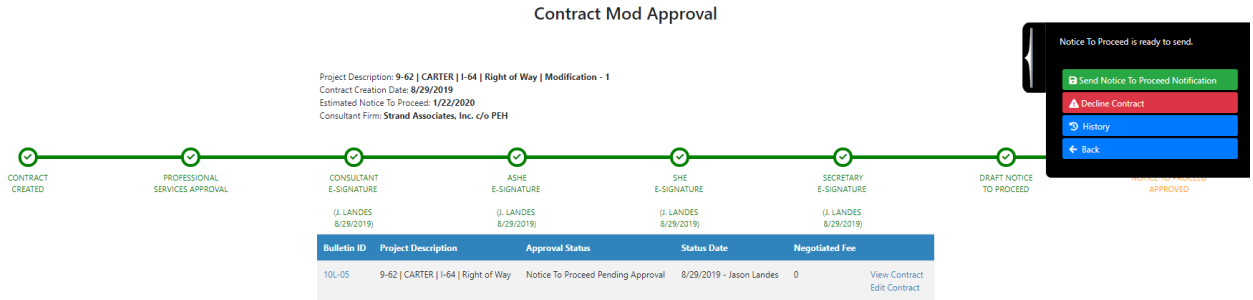
- Receipt of this email notification shall indicate that the Primary Consultant firm can begin work on the Project Specific Contract.

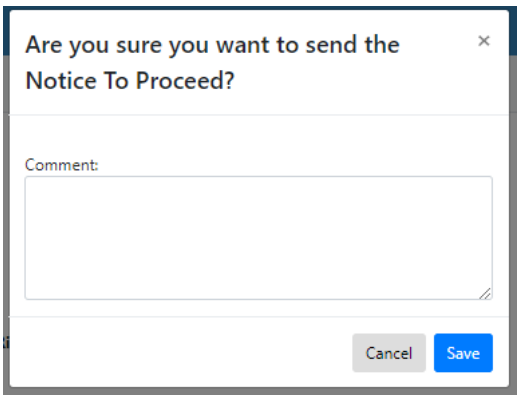


Contract Mod Approval



Contract Mod Approval





Contract Mod Approval

Project Description: **9-62 | CARTER | I-64 | Right of Way | Modification - 1**
Contract Creation Date: **8/29/2019**
Estimated Notice To Proceed: **1/22/2020**
Consultant Firm: **Strand Associates, Inc. c/o PEH**

CONTRACT CREATED	PROFESSIONAL SERVICES APPROVAL	CONSULTANT E-SIGNATURE	ASHE E-SIGNATURE	SHE E-SIGNATURE	SECRETARY E-SIGNATURE	DRAFT NOTICE TO PROCEED	NOTICE TO PROCEED APPROVED
		(J. LANDES 8/29/2019)	(J. LANDES 8/29/2019)	(J. LANDES 8/29/2019)	(J. LANDES 8/29/2019)		

Bulletin ID	Project Description	Approval Status	Status Date	Negotiated Fee	
10L-05	9-62 | CARTER | I-64 | Right of Way	Notice To Proceed Sent	8/29/2019 - Jason Landes	0	View Contract Edit Contract