South Dakota Special Provision Checklist System

User Manual

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South Dakota Department of Transportation

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DEPARTMENT OF TRANSPORTATION

Special Provision Checklist System User Manual

General Overview

Traditionally, the SD DOT Special Provision Checklist System was a document completed at the time final plans were nearing completion that was used to ensure all project functions necessary to move a project toward bidding and construction were completed. A long-standing issue with the checklist is once it was completed and submitted for letting it essentially became a static document that was rarely updated and resubmitted to report progress on functions yet to be completed. The Special Provision Checklist Application has been developed to move the checklist away from a being static document to a dynamic checklist where project stakeholders can provide and receive updates on pending matters. Some advantages of this system include:

- The ability to access it at any point the project is actively in the STIP
- The ability to provide input on different components of the project which will forever be stored in the system for other stakeholders to view and consider
  - For example, at any point during the design process the Area office could provide information pertaining to construction timing needs to alert other stakeholders of project scheduling needs.
- The ability of the system to retrieve information from other systems and auto-populate certain fields.

The Checklist App operates completely in a web-based environment and allows multiple users to be logged into a project at the same time. The Bid Letting Office highly recommends using **Google Chrome** (the State of South Dakota's Standard Browser) for an internet browser for optimal system performance. The Checklist App was designed for desktop and laptop hardware; however, it will also work on tablets.

Starting/Logging into the Program

To access the Checklist App, go to **https://hc65cl.appssd.sd.gov**. Please bookmark the site in your internet browser for easy access.

Sign in with your State Email or Company email.

- Consultants, please note this will be the same sign in used for CES and the individual email address used must be associated with a Consulting firm and <u>MUST</u> be registered with the Bid Letting Office. Please contact the Bid Letting Office at (605)773-3275 or email <u>DOTBids</u> if you need to be registered under a company.

SouthDakota

If you already have a mySD account, you can use your existing account info to log in.

Don't have an account? A mySD account will let you access State of South Dakota services using a single username and password.

If you have trouble logging in, visit the mySD and Citizen Portal Login Help page or call 605-773-3011 for assistance.

Enter email address to login

Continue

Home Screen/Starting a Checklist

Please Note: throughout the document this screen is referred to as the Home Screen.

1. For most of the projects in the system, the Status will be set to "Programmed"; however, if the project is not in the current STIP, the Status will need to be set to "All" in order to select the project.
   a. Select PCN from the drop-down box. You can click in the box and start typing the PCN to assist with filtering.
      i. If there are multiple PCN's tied together in the STIP a single checklist will be filled out. You can find the checklist by selecting any of the PCN's that are tied.
         1. e.g. PCN's 03WN and 07P4 are tied together in the STIP. If you search for PCN 03WN you will see the same checklist as when you search for PCN 07P4.
      ii. If multiple PCN's are going to be let in combination (meaning separate plans and separate contracts) a checklist needs to be filled out for each PCN.
   b. Select "Save" to activate the project in the system. This will enable you to edit the checklists.
   c. If there is a X PCN associated with the project the Project Manager will need to fill out and submit the CHECKLIST FOR PROJECTS LET IN COMBINATION WITH SDDOT PROJECTS.

2. If a consultant will be filling out a portion of the checklist, they gain access by being assigned to the project in the Contract Estimating System (CES). If a Consultant(s) has been assigned to a project the company name will be displayed under "Company". To add the individual(s) that worked on the

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plans you can select their name from the drop-down menu "Select Consultant".

    a. The individuals that are to be assigned to the project are those whom will be responsible for answering questions during the advertisement of the project.

    b. The system allows two individuals from each Consultant to be associated with a project.

    c. If your Consultants name is not shown in the drop-down list please contact the Bid Letting Office.

3. Project Scheduling Information is populated from Primavera. If the project is not scheduled in Primavera it will only populate the Programmed Federal Fiscal Year.

    a. We encourage project stakeholders to enter information in the open fields.

    b. The "Scheduling/Time Provision" button will place a note in the same location as the "Contract Time" note in the Special Provision Checklist.

Note Features

    a. There is a note button for most fields in the system. Use the note feature to communicate relevant comments.

        a. The system contains a feature so that you can notify people of the comment(s) that you entered.

    b. When someone has entered a note into the system the note button will turn red.

    c. All notes will show who created them and when.

    d. Notes CANNOT be deleted.

Note Email Notification

To send email notification of a note select the "Email Notification" button.

Email for Prosecution Note for PCN(s): 000S, 08DN

1 Select Receipent ⌄	2 Add Selected Receipent	Send Email	Back to Note List

To:		
Subject:	3	PCN(S): 000S, 08DN - Prosecution
Standard Msg:	4	This is a notification that your review is requested for a note that has been added to the Special Provision Checklist. Your response should be documented by adding a note within the Special Provision Checklist Application in effort to keep correspondence in one location.
Optional Additional Msg:	5	

1. Select Recipient
    a. If the recipient is not located in the dropdown box you can type in the email address manually in the To: box.
2. Click "Add Selected Recipient" to add recipient to the email.
3. The subject line is auto populated with the PCN and name of the note you have commented on.
4. The standard message is to notify the recipient to come back to the checklist to keep all correspondence in one location.
5. You can enter an optional additional message as needed.
6. Once complete select the "Send Email" button.

Special Provision Checklist

For the checklist to be considered complete you must select an option from the dropdown box for all fields.
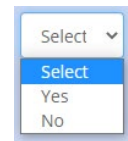
1. General Checklist Info
    a. In the Special Provision Checklist if you hover over the ⓘ it will display direction and explanations for when the provision should be used.
    b. If you select yes for a field that also has an option, you <u>must</u> fill out the option.
2. Contract Time Note
    a. When the contract time note is selected it will take you to a screen with two note options.
        i. General notes regarding bidding timeframes and construction schedule
        ii. Notes specific to the special provisions for contract time.
            1. If yes was selected in time provision field, it will display "checklist currently indicates that a time provision will

be needed for the project." This will display in red text to indicate that a note should be added.

3. Additional Project Specific Provision Needs
This feature is used to add additional project specific provisions that are needed on the project. The systems contains a list of project specific provisions that we commonly see on construction projects, but is not meant to be all inclusive.
    a. To add a project specific provision select click the "Select" option and scroll to find the provision that is needed. Once you have selected the appropriate provision click the "add additional provision" button for each provision that needs to be added.
    b. If the provision needed is not in the list click the "Add additional provision" button when the select option is active. You can then type in the provisions name.
    c. You will need to click the save button for each additional provision which is added.
    d. To delete a provision that is not needed, delete the text, and select "save".

4. Bid Letting Provision Needs
    a. This information will be provided by the Bid Letting Office.
        i. If you need to note a combination letting please do so under the Additional Project Specific Provision Needs.

Bid Letting Checklist

1. General Checklist Info
    a. If a project is scheduled in Primavera and has one of the activities listed in the checklist it will update as the activities are closed out in Primavera and will show the date completed.
        i. If a certification document is available, it will display next to the complete date as "Certification PDF".
    b. If a project is scheduled in Primavera and does not have one of the activities listed in the checklist, the fields will be fillable.
        i. Please work with the appropriate office to determine if the activity is needed and when it is anticipated to be complete.
    c. If a project is not scheduled in Primavera all fields will be fillable and need to be completed.

d. For all certifications the responsible office needs to enter information into the checklist. Please note that if your function has been completed in Primavera the system will automatically pull the certification date and mark as complete. In addition, the responsible office is responsible to place the certification PDF in the appropriate directory at the following link: \\state.sd.local\webdata$\WEBAPPS\Uploads\HC65CheckList\SavedDocuments. Once they have been placed in the appropriate directory, they will be available for viewing in the system.
     i. For the encroachment certification only, a date completed will be entered into the checklist based upon the date that the certification pdf was uploaded to the directory.

2. Environmental/Wetlands
   a. This information is pulled from ATLAS. If the CE has not been completed, please enter a note regarding the status of the certification.
   b. If there are multiple PCN's it will show the environmental classifications and wetlands in a grid.
      i. If the wetlands show no information, please contact the Environmental Coordinator.

3. ROW
   a. The program will automatically pull notes from Primavera and place them under the "note" button. When Primavera notes are pulled the "Created By" will be listed as Primavera.

4. Encroachment
   a. If the encroachment survey has not been completed, you will need to reach out to the Area to get the expected finish date.
   b. Once an encroachment survey has been completed and the encroachment survey has been placed in the webapps folder the pending/expected date will be removed and it will be replaced with "encroachment certification complete" and the encroachment survey PDF will show in the checklist.

5. TERO
   a. To ensure that all notes get saved for the project lengths on a reservation, the checkbox must be checked. Otherwise the note will not save.
   b. The note should indicate the length of the project or number of structures that are within reservation boundaries

   i. Please note that you are limited to only 100 characters.

  c. If C2C notes that the project is within reservation boundaries a red text indicator will show up to alert you.

6. Bid Item Price notes that are entered will be printed in the Generate Memo to Bid Letting in addition to the Special Provision Checklist.

Generate Checklist PDF

Select the "Generate Checklist.pdf" on the Home screen to generate a combined special provision and bid letting checklist for use with plans submittal. A copy of the exported pdf will automatically be saved to the C: drive of your computer under Downloads.

If items have not been filled out in the checklists they will display in red ?? on the pdf. Please ensure all fields are filled out before submitting the Special Provision Checklists.

Generate Release to Bid Letting Memo

We highly encourage the use of the system generated memo to bid letting, but if you currently have your own document, that contains all the same information, you can use that.

Select the "Generate Memo to Bid Letting" on the Home screen to generate the plans submittal memo. A copy of the exported word document will automatically be saved to the C: drive of your computer under Downloads.

The memo generated is based on Road Design's standard template and will need to be modified for each project.

1. The general project information is automatically input into the memo.
2. Blue Text is instructions and should be deleted.
3. Red Text is a placeholder and should be filled out if applicable.

Sign Out

When finished please save and Sign Out.