4.3 PSA – Awarding the Proposal

Background:

The evaluation and negotiation period are complete and a RONS has been signed. If the program code for any of the PSA being awarded is a capital project or several capital projects, that (or those) project(s) will need to be created in AWP and attached to the proposal.

Roles:

PSA User

Navigation:

If none of the items that have been negotiated for this contract will be charged to a capital project skip to Adding Items (Tasks).

Dashboard > Project Overview

1. Select the **Component Actions Menu** and click **Add**
2. In the **Project ID** field enter the IRIS ID appended with PSA (e.g. Z839640000PSA)
3. Enter the project's name in the **Project Name** field
4. Toggle **Item List** to *80-PSA*, **Spec Book** to *PSA – Professional Services Agreement*, **Project Type** to *13 – PSA* and click **Save**.
5. Click the **Categories and Items** quick link and select the **Categories** tab
6. Click **New** and toggle the **Category ID** to *00BB – Basic Bid* and click **Save**
7. Click the **Fund Package Overview** quick link and press the **Select Fund Packages** button.
8. Search for and select the PSA fund package and press the **Add Fund Package** button.

9. Repeat steps 1-8 for as many capital projects as should be included in the initial PSA award

Dashboard > Proposal Overview > Proposal

10. From the Proposal Summary click the **Projects** tab and click the **Select Projects** button
11. Select all projects that should be included in the PSA award and click **Add to Proposal**
12. Click **Save**

Adding Items (Tasks)

Proposal Summary > Projects Tab

1. Find and select the Project with the PSA number (used to advertise the PSA)
2. From the Project Summary, click the **Categories and Items** quick link at the top of the page and select the **Items** tab
3. Click the **Row Actions Menu** for the placeholder item added for advertising and select **Delete**.
4. Click **Save**.
5. Return to the Projects tab of the proposal summary and find and select the project for which the awarded tasks will be associated (you may need to add tasks to multiple projects on the proposal).
6. At the top of the page select the **Item Worksheet** quick link
7. Press **Select Items** and in the modal window select the **Category ID** and all **Items** most appropriate for each negotiated task, and press **Add to Project** (if you need to add the same item multiple times, from the worksheet, press **Select Item** again you can add the item again).
8. Double click the **Bid Sched Supp Description** and enter the Task and Description (i.e. Task 1 – PS&E Review).

9. Double click in the **Quantity** field and enter the dollar amount assigned for the task and enter a **Price** of 1. Click Save.
10. Once you have completed entering all items click the **Funding: Assign** to Items quick link. Expand the Project Items and make sure they are all assigned to a fund package by toggling the radio button(s) to the correct fund package. Click **Save**.
11. Repeat steps 5-10 for as many projects as you need to add items to.
12. Click the the **Proposal** link in the upper left hand corner and then press the **Sections and Items** quick link.
13. Select the **Component Actions Menu** and click **Auto Generate Sections**.
14. At the top of the page, click the **Proposal Vendors** quick link.
15. First, use the Awarded Proposal Vendor's **Row Action Menu** and click **delete** (this should be the winning vendor that you previously marked as in Negotiation). Click **Save**.
16. Press **Select Vendors**. In the modal window check the **Generate Estimate Bids box**, search for and select the vendor you are awarding to and press **Add to Proposal**. Update the **Bid Type**, **Plan Holder Type** and Toggle the **Bid Status** to Responsive and **Save**.
17. Click the **Bid Letting** link in the upper left corner and from the Letting Summary in the PSA collapsible, populate the **Intent to Award**, and **PSA Award** dates.
18. Select the **Proposals** tab, and expand the Proposal you are awarding. Check the **Awarded** box for the winning vendor and click **Save**.
19. Click the **Proposal** link and from the Proposal Summary, select the Time tab and enter the awarded date in the **Start Date** field.
20. Click the **Workflow** tab. change the **WorkflowPhase** to *Ready to Transition* and press **Save**.
21. Select the **Component Actions Menu** and click **Transition Proposal to Construction**.

22. Click the **Global Actions Menu** and select **Open Process History** to ensure there is a *Yes* under **Success**. If not download the Error.log to identify and correct any errors and try the transition again.

Next Steps:

The next step is activating the Contract so that it is possible to add amendments once they are issued. You can follow the QRG: *5.0 PSA – Activating a Contract*