

The Plans, Specifications, and Estimate (PS&E) Process

1. When the Project Manager (PM) is ready for the draft bid package review of their project, they will request a draft bid proposal via the Unifier PS&E business process (BP).

a. Please note, this is not the PS&E submission of a project. This is part of the final QC of the Project.

2. Engineering Support will compile all advertisement documents from Unifier, bid item information from AASHTOWare, special provision documents, and supplemental documents as required for individual projects to generate the draft proposal.

3. All Statements & Plans **must** be placed in the “**Statements**” BP and then attached to the PS&E record using the Statement Record Pickers in Unifier.

4. All other documents that are part of the project, including but not limited to, Breakout Sheets, Road User Cost (RUC) Language, Diesel Fuel Cost Adjustment Appendix, etc. **must** be placed in the “**Additional Forms**” Tab in Unifier.

5. The draft proposal will include the technical content needed to be reviewed by the PM prior to PS&E. This includes the following:

a. Cover Page.

b. Statements.

c. Special Provision Table of Contents. This is a list of all the Special Provisions (SP) for the project, this list is generated from the items in AASHTOWare.

d. Special Provision Document. These will be pulled from the boilerplate special provisions via project wise unless modified via the Unifier Special Provisions BP.

i. Review all SPs in the draft proposal to ensure they are correct.

e. Bid Pages, Item numbers, Item descriptions, and quantities are exported from AASHTOWare and loaded into Unifier by the PM. Ensure the most up to date estimate is provided. Contract Administration will use an export from AASHTOWare to Bid-X to generate a bid item list once the proposal is advertised.

f. Ensure Engineering Support has the following, as applicable:

- Technical Specifications
- Appendices (Diesel Fuel Cost Adjustment, CMGC Risk Register, etc.)
- Transportation Management Plan
- RUC Language
- Incentive/disincentive Language
- Breakout Sheets (in correct excel format)
- A+B Bidding Form (filled out by PM)
- Pre-Bid Meeting Language
- Item 763564 - Special Bidding Procedure (filled out by PM)
- Signed Plans
- Stormwater Signature on Plans, or any other signatures required not under the Engineer of Record (EOR).

- Correct Railroad Specification Language
- PM **must** ensure the Engineers Estimate is loaded in Unifier
- The Cost Estimates in AASHTOWare and Unifier **must** match
- Any other information needed for the project

6. Once the draft bid package is provided by Engineering Support to the PM, the PM should coordinate with their Design Resource Engineer (DRE) and/or their review staff and complete a full review of the draft bid package. The PM should ensure everything provided is correct and any adjustments should be made during this step. The files provided in this step for review by the PM are the Plans, Specifications, and Estimate (PS&E).

- a. The project will become read-only in AASHTOWare project once the draft bid package has been submitted. If any modifications or adjustments need to be made to the project must be noted in Unifier and requested to have access back.
- b. Any modifications or corrections that need to be made must be noted via Unifier. Engineering support will correct the documents and send another draft to review.
- c. Please note, Contract Administration will combine the draft bid package file with the Request for Proposals (RFP) contract language to complete the advertisement, so the front-end contract information is not provided at this step.

7. Once the PS&E has been reviewed and confirmed for accuracy by the PM, the PM must approve the draft in Unifier and Engineering support will submit PS&E to Contract Administration for advertising. This is the official PS&E of a project and the PM will receive an email confirmation via Unifier that the project has been transferred to Contract Administration.

8. Contract Administration will compile the other standard documentation required for the contract advertisement and send the PM a draft of the complete proposal to review. The PM should focus on ensuring all required contract language has been provided as well as the documents previously reviewed are present in the proposal.

- a. No additional changes to the plans or bid items should happen at this stage. Any changes to plans, specifications, or estimate at this time will necessitate a RE-PS&E of the project and may require resubmission to the DBE group to revise the DBE and OJT requirements.

9. In the event of a RE-PS&E, the PM will reach out to and notify Contract Administration that a change will need to be made. The RE-PS&E process will create a new PS&E record in which the PM will need to fill in the new record and submit it to Engineering Support for review.