

APPENDIX K – PSCRS JOB AID

Access PSCRS home page by navigating to: <http://pscrrs.cov.virginia.gov/default.aspx>

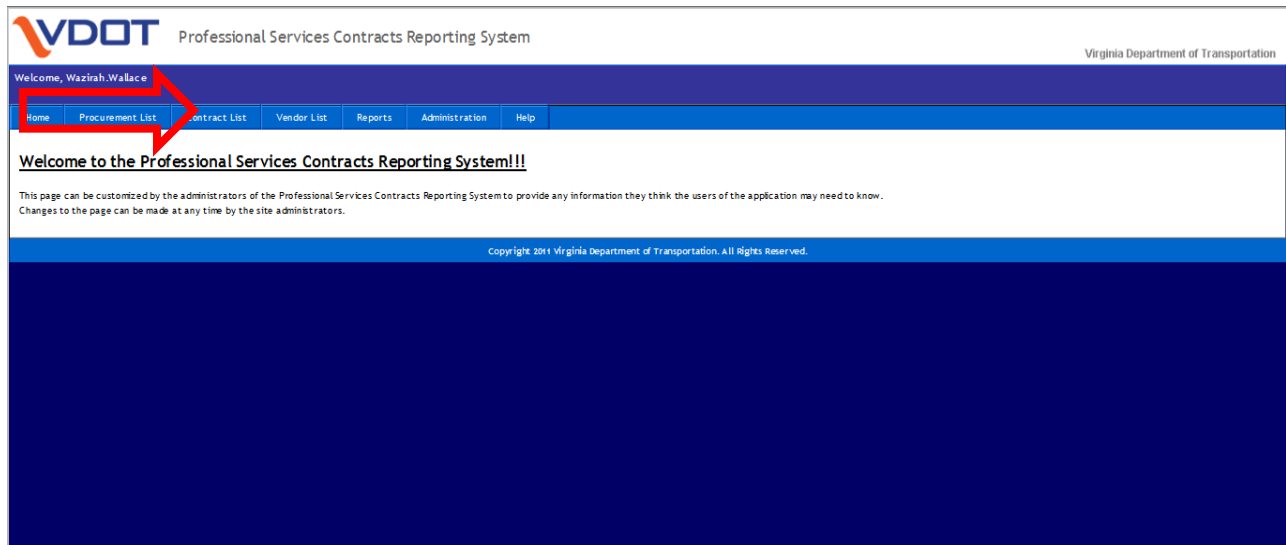


Figure 1 – PSCRS Home Page

Once on the homepage users should select the “Contract List” Module tab to access the database of professional service contracts.

VDOT Professional Services Contracts Reporting System Virginia Department of Transportation

Welcome, Wazirah.Wallace

Home Procurement List **Contract List** Vendor List Reports Administration Help

Contract List

District: [All Districts] v
 Division: [All Divisions] v
 Contract Type: [All Contract Types] v
 Project Status: Active v

Quick Search: Search Reset

(Contract Id, Description, UPC Code, Primary Vendor, Secondary Vendor)

District	Division	Contract Id	Description	Contract Type	UPC Code	Administrators	Primary Vendor	Secondary Vendor
Central Office	Structure & Bridge	5692	New Design - Region I - Bristol, Salem, Lynchburg	Term Contract (Current Term: 1)			TRC ENGINEERS INC	CLARK NEXSEN OWN BARBIERI GIBSON, Athavale, Lystad & Associates, Lumsden Associates, P.C.
Central Office	Structure & Bridge	29058	Bridge Safety Inspection Contract - Staunton District	Term Contract (Current Term: 3)		Jeff.Hetzer	VOLKERT INC	SCHWARTZ & ASSOCIATES, INC.
Central Office	Structure & Bridge	29080	Maintenance & Repair Term Contract - Region I (Bristol & Salem Districts)	Term Contract (Current Term: 3)			AECOM TECHNICAL SERVICES INC	Athavale, Lystad & Associates, PSI
Central Office	Structure & Bridge	29081	Maintenance Contract - Region II (Lynchburg, Culpeper & Staunton Districts)	Term Contract (Current Term: 3)		Matthew.Yakim	WHITMAN REQUARDT & ASSOCIATES	SCHWARTZ & ASSOCIATES, INC., RAJAN MAHIMA ASSOCIATES INC, NXL CONSTRUCTION SERVICES INC, Professional Services Industries, Inc.
			Maintenance & Repair Term Contract -	Term Contract				SCHWARTZ & ASSOCIATES, INC., NXL CONSTRUCTION

Figure 2 – Contract List Default Page

In the Contract List users may filter the contract list by District, Division, Contract Type and Project Status or Quick Search by entering key contract information (i.e. contract number, UPC or key words).

Contract Details			
Contract Status:	Active	Contract Id:	46737
District:	Central Office	Division:	Construction
Contract Type:	Term Contract	Contract Manager:	Wazirah Wallace
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.

Contract Type Specific Details Administrators Vendors Term Details Task Details Voucher Details Consultant Position			
General Details			
Region Type:	Statewide (S)	Current Term:	1
Term Expiration Date:	6/11/2020	Amount Per Term:	\$2,000,000.00
Task Order Amount For Current Term:	\$70,659.33	Contract Balance Under Current Term:	\$1,929,340.67
Task Order Amount (Cumulative):	\$70,659.33	Latest Task Order No:	
Total Available Capacity:	\$5,929,340.67	Overhead Rate:	\$0.00
Voucher Details			
Last Voucher No:	1	Last Voucher Date:	8/10/2018
Final Voucher?:	No		
SW AMOBE Details			
DBE Type:	Participation	SWAM Type:	
DBE Value (%):	10.00	SWAM Value (%):	0.00
DBE Goal:	\$7,065.93	SWAM Goal:	\$0.00
DBE Voucher Amount:	\$0.00	SWAM Voucher Amount:	\$0.00
DBE % Achieved:	0.00%	SWAM % Achieved:	0.00%

Figure 3 – Contract Details Screen

Once the contract the user intends to review is filtered or found by the quick search feature, the user should select the contract record by clicking the desired record. This will open the “Contract Details/Contract Type Specific Details” screen.

The Contract Details screen provides a summary of the critical contract information that is captured in the subsequent tabs. All tabs include:

- Contract Type Specific Details
- Administrators
- Vendors
- Term Details
- Voucher Details
- Consultant Positions

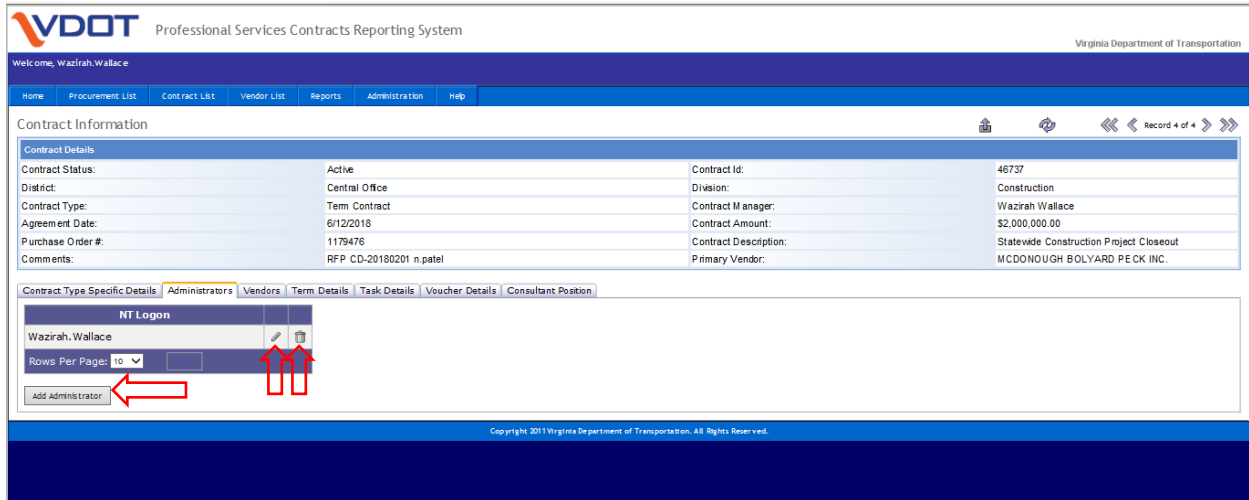


Figure 4 – Administrators Tab

The Administrators tab should be utilized by Contract Managers to identify Administrators of the specific contract. Administrators may include any person who performs official duties on behalf of the Department in relation to the management and administration of the consultant services.

Administrators should be added, deleted and/or revised by the Contract Manager as contract administration staff change.

VDOT Professional Services Contracts Reporting System Virginia Department of Transportation

Welcome, Wazirah Wallace

Home | Procurement List | Contract List | Vendor List | Reports | Administration | Help

Contract Information Record 4 of 4

Contract Details			
Contract Status:	Active	Contract Id:	46737
District:	Central Office	Division:	Construction
Contract Type:	Term Contract	Contract Manager:	Wazirah Wallace
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.

Contract Type Specific Details | Administrators | **Vendors** | Term Details | Task Details | Voucher Details | Consultant Position

Vendor	Is Prime?	Is SWAM?	Is DBE?		
CES CONSULTING, LLC	No	No	Yes		
GANNETT FLEMING INC	No	No	No		
Keville Enterprises	No	No	Yes		
MCDONOUGH BOLYARD PECK INC.	Yes	No	No		
Quinn Consulting Services, Inc.	No	No	Yes		
SEPI Engineering & Construction Inc	No	No	Yes		

Rows Per Page: 10

Figure 5 – Vendors Tab

The Vendors tab contains a list of the vendor/consultant team which have been awarded the contract. Upon execution of the contract the Vendors tab is populated by the Consultant Procurement Office identifying the selected firm(s), whether they are the prime or subconsultant, and identifying each firm’s SWaM and/or DBE Status. For accurate reporting it is essential that the correct vendor is selected and each vendor’s identifying information is accurate.

VDOT Professional Services Contracts Reporting System Virginia Department of Transportation

Welcome, Wazirah, Wallace

Home Procurement List Contract List Vendor List Reports Administration Help

Contract Information Record 4 of 4

Contract Details

Contract Status:	Active	Contract Id:	46737
District:	Central Office	Division:	Construction
Contract Type:	Term Contract	Contract Manager:	Wazirah Wallace
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.

Contract Type Specific Details Administrators Vendors **Term Details** Task Details Voucher Details Consultant Position

Term	Begin Date	Expiration Date	Task Amount	Task Hours
1	06/12/2018	06/11/2020	\$70,659.33	810

Add Term

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Figure 6 – Term Details Tab

The Term Details tab identifies the begin date, and expiration date of each contract term. As task orders are entered into PSCRS the system provides the cumulative task order value and hours for each given term. Upon execution of the contract, the Term Details tab is populated by the Consultant Procurement Office identifying the first term begin date and expiration date.

PSCRS Task Orders

Task Order Name	Description	Effective Date	Term	Project No	UPC Code	Total Amount	Total Hours
7-0001	RICH- On Call Guardrail	07/20/2018	1	9999-964-316	105330	\$23,259.00	270
7-0002	RICH-Latex Microsurfacing	07/20/2018	1	LM4R-020-F17	110749	\$3,230.00	36
7-0003	RICH-On Call Pavement Marking	07/20/2018	1	9999-964-332	105585	\$4,076.00	63
7-0004	RICH- Asphalt Resurface SB Rte 95	07/23/2018	1	PM43-074-F18	111072	\$6,018.00	75
7-0006	RICH-Washington Street Bridge Rehab	09/12/2018	1	U000-123-285	107151	\$6,165.00	67
7-0009	RICH-Add Left Turn Lane Rte 156 Prince George	09/13/2018	1	0156-074-762	104847	\$3,087.00	36
7-0011	RICH-Improve Intersection 645&144 Prince George	09/13/2018	1	0645-074-755	105131	\$3,892.00	44
8-0002	SA-Rte. 11 over Beckner Branch-Bridge replacement	09/18/2018	1	NFO0011-011-111, M501, B607	82226	\$9,377.33	97
H-0003	HR-Clean & Repaint Structural Steel (4 Bridges)	09/26/2018	1	(NFO) 0264-965-221, N501, B678-B681	108462	\$3,040.00	33
I-0001	BRIS-ADD AUX MERGE LANE I-77 AT I-81	09/28/2018	1	FO 077-098-754, CS01	103320	\$8,515.00	89

Figure 7 – Task Details Tab

The Term Details tab is utilized to capture the record of each task order that is executed under the consultant contract. Column headings may be selected for sorting and ordering the task orders. Each task order record must include the following:

- Task Order Name – The task order name/number serves as a unique identifier for each task order
- Description – Should be brief and may include a route, service provided, names and identifying task information
- Effective Date – Shall be the date the Notice to Proceed is executed/date the Department provide written approval for the consultant to begin work
- Term – Will be auto-populated
- Project No. – may include various project numbers
- UPC Code – may include various UPC's
- Total Amount – Will generate based on the total team dollar value entered
- Total Hours – Will generate based on the total team dollar value entered

The total term task order value reflected in PSCRS will be locked in at the time of a renewal. As task orders are entered into PSCRS, the system provides the cumulative task order value and hours to other tabs.

Entering a Task Order

Task Order Name	Description	Effective Date	Term	Project No	UPC Code	Total Amount	Total Hours		
7-0001	RICH- On Call Guardrail	07/20/2018	1	9999-964-316	105330	\$21,851.65	265		
7-0002	RICH-Latex Microsurfacing	07/20/2018	1	LM4R-020-F17	110749	\$2,869.48	31		
7-0003	RICH-On Call Pavement Marking	07/20/2018	1	9999-964-332	105585	\$3,146.86	53		
7-0004	RICH- Asphalt Resurface SB Rte 95	07/23/2018	1	PM43-074-F18	111072	\$3,879.33	75		
7-0006	RICH-Washington Street Bridge Rehab	09/12/2018	1	U000-123-285	107151	\$4,711.78	67		
7-0009	RICH-Add Left Turn Lane Rte 156 Prince George	09/13/2018	1	0156-074-762	104847	\$2,438.56	28		
7-0011	RICH-Improve Intersection 645&144 Prince George	09/13/2018	1	0645-074-755	105131	\$3,844.77	44		
8-0002	SA-Rte. 11 over Beckner Branch-Bridge replacement	09/18/2018	1	NFO0011-011-111, M501, B607	82226	\$9,377.33	97		
H-0003	HR-Clean & Repaint Structural Steel (4 Bridges)	09/26/2018	1	(NFO) 0264-965-221, N501, B678-B681	108462	\$3,040.00	33		
1-0001	BRIS-ADD AUX MERGE LANE I-77 AT I-81	09/28/2018	1	FO 077-098-754, C501	103320	\$8,515.00	89		

Rows Per Page: 10 | First | Previous | Page 1 of 5 | Next | Last

Add Task Order

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Figure 8 – Add Task Order

To add a new task order, users must select the “Add Task Order” button at the bottom left of the screen.

To revise a task order already in the system, users must select the pencil icon to the right of the task order they wish to revise. “ ”

To delete a task order already in the system, users must select the trashcan icon to the right of the task order they wish to delete. “ ”

District:	Central Office	Division:	Construction
Contract Type:	Term Contract	Contract Manager:	Wazirah Wallace
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.

Task Order Name	Description	Effective	Total Amount	Total Hours
7-0001	RICH- On Call Guardrail	07/20/18	\$23,259.00	270
7-0002	RICH-Latex Microsurfacing	07/20/18	\$3,230.00	36
7-0003	RICH-On Call Pavement Marking	07/20/18	\$4,076.00	63
7-0004	RICH- Asphalt Resurface SB Rte 95	07/23/18	\$6,018.00	75
7-0006	RICH-Washington Street Bridge Rehab	09/12/18	\$6,165.00	67
7-0009	RICH-Add Left Turn Lane Rte 156 Prince George	09/13/18	\$3,087.00	36
7-0011	RICH-Improve Intersection 6458/144 Prince George	09/13/18	\$3,892.00	44
8-0002	SA-Rte. 11 over Beckner Branch-Bridge replacement	09/18/18	\$9,377.33	97
H-0003	HR-Clean & Repaint Structural Steel (4 Bridges)	09/26/18	\$3,040.00	33
1-0001	BRIS-ADD AUX MERGE LANE I-77 AT I-81	09/28/2018	\$8,515.00	89

New Task Order

Task Order Name:

Description:

Effective Date:

Project No:

UPC Code:

Vendor Amounts/Hours CANNOT be added until the task has been created.

Rows Per Page:

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Figure 9 – New Task Order

1. Enter the task order Name/Number
2. Enter the task order description
3. Enter the effective date of the Notice to Proceed
4. Enter the project number(s)
5. Enter the UPC code(s)
6. Select “Save”

Once the user has selected to save the entry the task order details just entered will populate on the following screen.

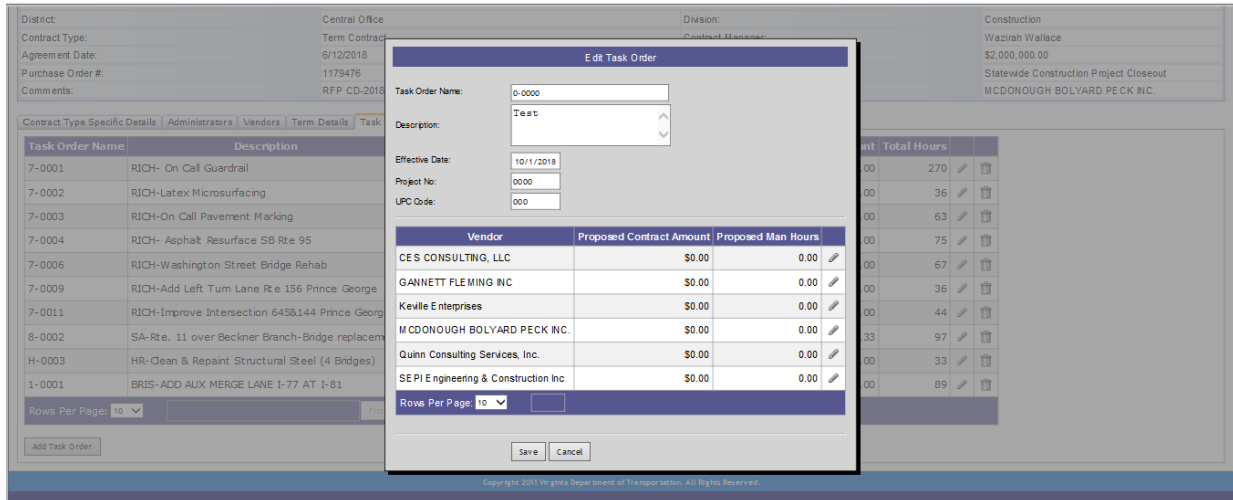


Figure 10 – Add Task Order Allocation

Users must review the executed task order documents and detail the allocation of proposed contract dollars/amount and hours to each prime and Subconsultant as identified in the task order and enter the amounts in this screen by selecting the pencil icon to the right of each consultant.

Table 1 – Allocation Example

		Proposed Amount	Contract Proposed Hours	Man
Entered:	Prime Consultant:	\$50,000	500	
	Subconsultant A:	\$25,000	250	
	Subconsultant B:	\$25,000	250	
Populated on Save	Total Task Order Value:	\$100,000	1,000	

District: Central Office Division: Construction
 Contract Type: Term Contract Contract Manager: Wazrah Wallace
 Agreement Date: 6/12/2018 Contract Amount: \$2,000,000.00
 Purchase Order #: 1179476 Statewide Construction Project Closeout
 Comments: RFP CD-20180201 n.patel MCDONOUGH BOLYARD PECK INC.

Contract Type Specific Details Administrators Vendors Term Details Task Details Vouch

Task Order Name	Description	Effective	Total Amount	Total Hours
7-0001	RICH- On Call Guardrail	07/20/18	\$23,259.00	270
7-0002	RICH-Latex Microsurfacing	07/20/18	\$3,230.00	36
7-0003	RICH-On Call Pavement Marking	07/20/18	\$4,076.00	63
7-0004	RICH- Asphalt Resurface SB Rte 95	07/23/18	\$6,018.00	75
7-0006	RICH-Washington Street Bridge Rehab	09/12/18	\$6,165.00	67
7-0009	RICH-Add Left Turn Lane Rte 156 Prince George	09/13/18	\$3,087.00	36
7-0011	RICH-Improve Intersection 645&144 Prince George	09/13/18	\$3,892.00	44
8-0002	SA-Rte. 11 over Beckner Branch-Bridge replacement	09/18/18	\$9,377.33	97
H-0003	HR-Clean & Repaint Structural Steel (4 Bridges)	09/26/18	\$3,040.00	33
1-0001	BRIS-ADD AUX MERGE LANE I-77 AT I-81	09/28/18	\$8,515.00	89

Rows Per Page: 10 First Previous

Add Task Order

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Edit Task Order

Task Order Name: 0-0000
 Description: Test
 Effective Date: 10/11/2018
 Project No: 0000
 LPC Code: 000

New Task/Vendor Order

Vendor: MCDONOUGH BOLYARD PECK INC.
 Contract Amount: 0
 Man Hours: 0

Save Cancel

Figure 11 – New Task/Vendor Order

1. Enter the contract/task order amount allocated for the selected consultant
2. Enter the man-hour total allocated for the selected consultant
3. Select “Save”

Contract Details									
Contract Status:	Active	Contract Id:	46737						
District:	Central Office	DMSion:	Construction						
Contract Type:	Term Contract	Contract Manager:	Wazirah Wallace						
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00						
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout						
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.						

Contract Type Specific Details Administrators Vendors Term Details Task Details Voucher Details Consultant Position									
Task Order Name	Description	Effective Date	Term	Project No	UPC Code	Total Amount	Total Hours		
7-0001	RICH- On Call Guardrail	07/20/2018	1	9999-964-316	105330	\$23,259.00	270		
7-0002	RICH-Latex Microsurfacing	07/20/2018	1	LM4R-020-F17	110749	\$3,230.00	36		
7-0003	RICH-On Call Pavement Marking	07/20/2018	1	9999-964-332	105585	\$4,076.00	63		
7-0004	RICH- Asphalt Resurface SB Rte 95	07/23/2018	1	PM43-074-F18	111072	\$6,018.00	75		
7-0006	RICH-Washington Street Bridge Rehab	09/12/2018	1	U000-123-285	107151	\$6,165.00	67		
7-0009	RICH-Add Left Turn Lane Rte 156 Prince George	09/13/2018	1	0156-074-762	104847	\$3,087.00	36		
7-0011	RICH-Improve Intersection 645&144 Prince George	09/13/2018	1	0645-074-755	105131	\$3,892.00	44		
8-0002	SA-Rte. 11 over Beckner Branch-Bridge replacement	09/18/2018	1	NFO0011-011-111, M501, B607	82226	\$9,377.33	97		
H-0003	HR-Clean & Repaint Structural Steel (4 Bridges)	09/26/2018	1	(NFO) 0264-965-221, NS01, B678-B681	108462	\$3,040.00	33		
1-0001	BRIS-ADD AUX MERGE LANE I-77 AT I-81	09/28/2018	1	FO 077-098-754, CS01	103320	\$8,515.00	89		
0-0000	Test	10/01/2018	1		0000	\$300.00	6		
H-0004	HR-Courtland Roadway Widening/Bridges	10/05/2018	1	(NFO) 6058-087-E11, B636, B637, CS01	17728	\$51,572.00	564		

Figure 12 – Task Details Tab 2

Once saved the user will be returned to the Add Task Order Allocation screen in Figure 10. Users will repeat the processes associated with Figure 10 and Figure 11 for each prime and subconsultant identified in the task order until all contract/task order dollars and hours are accounted for.

Once complete select “Save” to be returned to the Task Details tab.

On the Task Details tab confirm the total task amount and total hours are accurate.

PSCRS Voucher Details

The screenshot displays the 'Voucher Details' tab within a web application. At the top, there is a navigation menu with options: Home, Procurement List, Contract List, Vendor List, Reports, Administration, and Help. Below the menu is the 'Contract Information' section, which includes a 'Contract Details' table with the following data:

Contract Status:	Active	Contract Id:	46737
District:	Central Office	Division:	Construction
Contract Type:	Term Contract	Contract Manager:	Wazrah Wallace
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.

Below the contract information, there are several tabs: Contract Type Specific Details, Administrators, Vendors, Term Details, Task Details, Voucher Details (selected), and Consultant Position. The 'Voucher Details' tab contains a form with dropdown menus for 'Voucher:' and 'Vendor:', and a checkbox for 'Final Voucher:'. Below the form is a table with the following data:

Voucher No	Vendor	Is Prime?	SWAM	DBE	Voucher Date	Hours	Amount	Previous Hours	Previous Amount
1	MCDONOUGH BOLYARD PECK INC. (Cardinal ID: 25966)	Yes	No	No	08/10/2018	213.00	\$17,568.91	0.00	\$0.00
Subtotal Voucher 1						213.00	\$17,568.91		
Total (MCDONOUGH BOLYARD PECK INC.)						213.00	\$17,568.91		
Total						213.00	\$17,568.91		

At the bottom of the table, there are buttons for 'Add Voucher' and 'Export To Excel'. The footer of the application reads 'Copyright 2011 Virginia Department of Transportation. All Rights Reserved.'

Figure 13 – Voucher Details Tab

The Voucher Details tab is utilized to capture the record of each voucher that is processed by the Department for the specific contract. Once a complete and accurate consultant invoice is received and approved for payment. The Contract Administrator must update the Voucher Details tab. Each voucher record must include the following:

- Voucher No. – The voucher number entry should reference the consultants invoice number and may include additional reference information beneficial to the Department
- Vendor, Prime, SWaM and DBE – This information is populated based on previously entered consultant details and is auto-populated
- Voucher Date – The date the complete and accurate and consultant invoice is received
- Hours – Total consultant hours per prime and subconsultant
- Amount – Total dollar value per consultant
- Previous Hours, Previous Amount – Is auto-populated from information previously entered in the system

As invoices are entered, the cumulative invoice value per prime and subconsultant is calculated at the bottom of all invoices.

The column headings may be selected for sorting and ordering the list by the column heading.

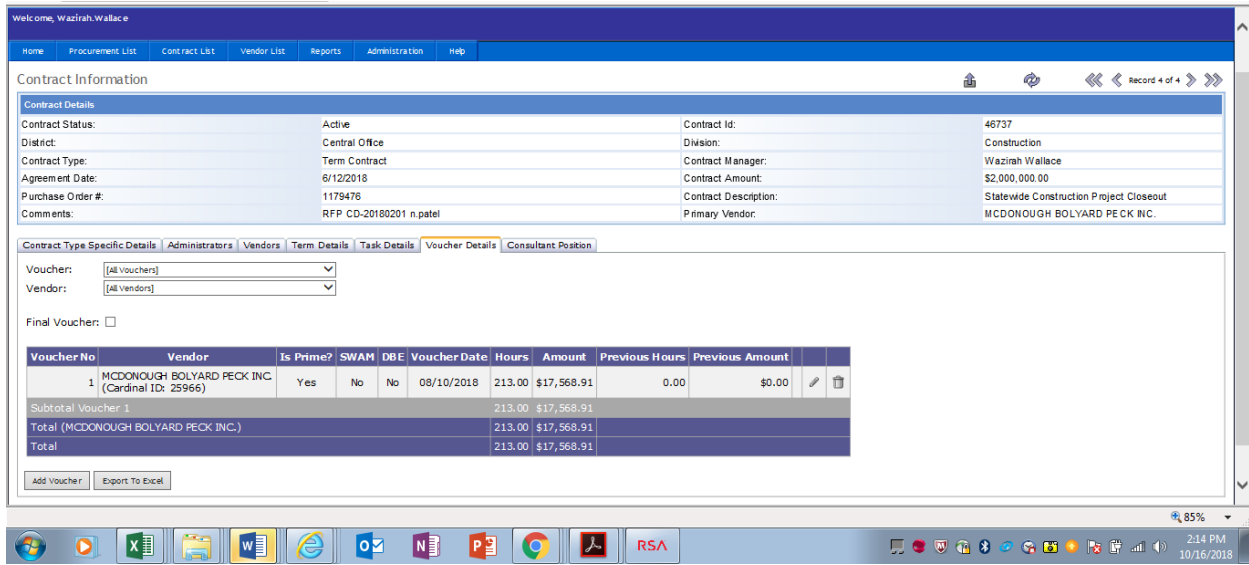




Figure 14 – Add Voucher Cont’d

To add a new voucher, users must select the “Add Voucher” button at the bottom left of the screen.

To revise a voucher already in the system, users must select the pencil icon to the right of the voucher entry they wish to revise. “  ”

To delete a voucher already in the system, users must select the trashcan icon to the right of the voucher entry they wish to delete. “  ”

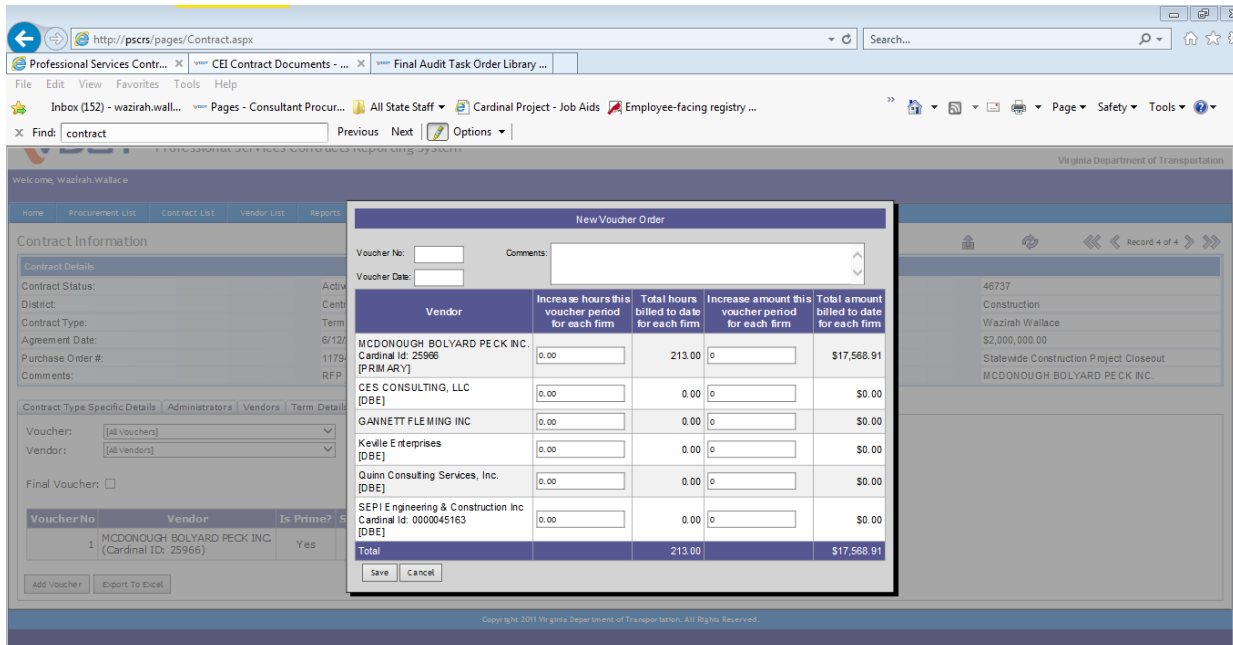


Figure 15 – Add Voucher Allocation Chart

Users must review the approved invoice documents and allocate the invoiced dollars/amount and hours to each prime and subconsultant as identified in the invoice.

Once the user has selected “Add Voucher”, the user should enter the following:

1. Enter the Voucher No.
2. Enter the Voucher Date
3. Enter Comments (optional)
4. Enter the total hours per consultant in “Increase hours this voucher period for each firm” field
5. Enter the total dollar amount per consultant in “Increase amount this voucher period for each firm” field
6. Select “Save”

Note: For reporting purposes, it is critical that all prime and subconsultant payments and hours are allocated separately and correctly.

The “Total hours billed to date for each firm” and “Total amount billed to date for each firm” fields will auto-populate based on previous voucher entries.

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Contract Details

Contract Status:	Active	Contract ID:	46737
District:	Central Office	Division:	Construction
Contract Type:	Term Contract	Contract Manager:	Wazirah Wallace
Agreement Date:	6/12/2018	Contract Amount:	\$2,000,000.00
Purchase Order #:	1179476	Contract Description:	Statewide Construction Project Closeout
Comments:	RFP CD-20180201 n.patel	Primary Vendor:	MCDONOUGH BOLYARD PECK INC.

Contract Type Specific Details Administrators Vendors Term Details Task Details Voucher Details Consultant Position

Voucher: [All Vouchers] Vendor: [All Vendors]

Final Voucher:

Voucher No	Vendor	Is Prime?	SWAM	DBE	Voucher Date	Hours	Amount	Previous Hours	Previous Amount
1	MCDONOUGH BOLYARD PECK INC. (Cardinal ID: 25966)	Yes	No	No	08/10/2018	213.00	\$17,568.91	0.00	\$0.00
Subtotal Voucher 1						213.00	\$17,568.91		
Total (MCDONOUGH BOLYARD PECK INC.)						213.00	\$17,568.91		
Total						213.00	\$17,568.91		

Add Voucher Export To Excel

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Figure 16 – Task Details Tab 2

Once the entry has been saved, the user will be returned to the Voucher Details Tab. On the Voucher Details tab, confirm the data entry for each consultant is correct and the voucher subtotal is accurate.

On the Voucher Details tab users have the option to export the Voucher Details to Excel, a pdf document and/or the printer by selecting the “Export to Excel” button at the bottom left of the screen.