Section 34

APPENDICES

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APPENDIX A
NJSDA Cost Codes

(Below the Line Costs are highlighted in yellow)

010	**Real Estate Services**
010.10	Predevelopment
010.10.01	Site Survey
010.10.080	Predevelopment Relocation
010.10.090	Predevelop Agremnt not to lease
010.10.091	Predevelopment Reimbursements
010.20	Property/Land Purchase
010.20.01	Relocation Consultant
010.20.01.081	Relo Consult Program Costs
010.20.01.082	Relo Consult Labor Costs
010.20.01.083	Relo Consult Other Direct Costs
010.20.01.084	Relo Consult Moving Estimates
010.20.01.085	Relo Consult Property manage Svcs
010.20.01.086	Relo Consult Delivery Cost
010.20.02	Title Search Fees
010.20.100	Land Acq. Negotiator Labot
010.20.110	Lan Acq. Negotiator Other Direct
010.20.200	Land Acq. (Purchase)
010.20.210	Land Acq. (Condemnation)
010.20.215	Land Acq. Legal
010.20.220	Real Estate Taxes
010.20.225	Deed Notice
010.30	Environmental
010.030.10	Environmental Consultant
010.030.20	Remediation Services
010.40	Relocation
010.40.075	Owner Housing Supplement
010.40.076	Tennant Rent Supplement
010.40.077	Replacement Housing Closing Costs
010.40.078	Moving Costs
010.40.079	Mortgage Rate Differential
010.40.087	Property Maintenance Delivery Cost
010.40.088	Contingency Commercial Relocate
010.90	Real Estate Svcs C O Contingency
010.95	Real Estate Svcs Claims Cont.
020	**Design Fees**
020.10	Program/Concept Design
020.20	Schematic Design
020.30	Design Development
020.40	Construction Documentation
020.50	Construction Administration
020.60	LEED

020.80	Design Allowances
020.90	Design C.O. Contingency
020.95	Design Claims Contingency
030	**Construction**
030.01	General Conditions
030.02	Existing Conditions
030.02.41.00B	Selective Site Demolition (BTL)
030.02.41.16B	Building Demolition (BTL)
030.02.41.19B	Selective Structure Demolition (BTL)
030.02.50.00B	Selective Site Remediation (BTL)
030.02.60	Plastic Fabrications
030.02.62.00B	Underground Tank Removal (BTL)
030.02.81.00B	Trans & Disp of HazMats (BTL)
030.03	Concrete
030.03.20	Concrete Reinforcement
030.03.30	Cast-in-Place Concrete
030.03.40	Precast Concrete
030.04	Masonry
030.04.05	Common Work Results for Masonry
030.04.20	Unit Masonry
030.04.21	Brick Masonry
030.05	Metals
030.05.10	Structural Metal Framing
030.05.20	Metal Joists
030.05.30	Metal Deck
030.05.40	Cold Formed Metal Framing
030.05.50	Metal Fabrications
030.05.70	Ornamental Metal
030.06	Wood and Plastic
030.06.10	Rough Carpentry
030.06.20	Finish Carpentry
030.06.40	Architectural Woodwork
030.07	Thermal and Moisture Protection
030.07.10	Damproofing & Waterproofing
030.07.20	Thermal Protection
030.07.30	Shingles\ Roof Tiles\Roof Coverings
030.07.40	Roofing & Siding Panels
030.07.50	Membrane Roofing
030.07.60	Flashing & Sheet Metal
030.07.70	Roof Special Tiles & Accessories
030.07.80	Fire & Smoke Protection
030.07.90	Joint Sealers

030.07.95	Expansion Control
030.08	Doors and Windows
030.08.10	Doors & Frames
030.08.11	Metal Doors & Frames
030.08.30	Specialty Doors & Frames
030.08.41	Entrances & Storefronts
030.08.44	Glazed Curtain Wall Systems
030.08.50	Windows
030.08.60	Roof Windows & Skylights
030.08.70	Hardware
030.08.80	Glazing
030.08.90	Louvers & Vents
030.09	Finishes
030.09.20	Plaster & Gypsum Board
030.09.22	Supports for Plaster & Gypsum
030.09.30	Tile
030.09.50	Ceilings
030.09.60	Flooring
030.09.69	Access Flooring
030.09.70	Wall Finishes
030.09.80	Acoustical treatment
030.09.90	Paints & Coatings
030.10	Specialties
030.10.11	Surfaces
030.10.14	Signage
030.10.21	Compartments & Cubicles
030.10.22	Partitions (Factory Fabricated)
030.10.26.13	Wall & Corner Guards
030.10.28	Toilet, Bath & Laundry Accessories
030.10.44	Fire Protection Specialties
030.10.51	Lockers
030.10.56	Storage Assemblies
030.10.57	Wardrobe & Closet Specialties
030.10.73	Protective Covers
030.10.75	Flagpoles
030.11	Equipment
030.11.13	Loading Dock Equipment
030.11.26	Unit Kitchens
030.11.31	Residential Equipment
030.11.40	Food Service Equipment
030.11.51	Library Equipment
030.11.52	Audio-Visual Equipment
030.11.53	Laboratory Equipment
030.11.61	Theater & Stage Equipment
030.11.65	Athletic Rec\Therapeutic Equipment
030.12	Furnishings
030.12.30	Manufactured Casework
030.12.40	Furnishings & Accessories

030.12.60	Multiple Seating
030.13	Special Construction
030.13.20	Special Purpose Room
030.14	Conveying Systems
030.14.20	Elevators
030.14.40	Lifts
030.21	Fire Suppression
030.21.11	Facility Fire Supp\Water Svc Piping
030.22	Plumbing
030.22.05	Basic Material & Methods
030.22.11	Facility Water Distribution
030.22.40	Plumbing Fixtures & Equipment
030.23	HVAC
030.23.08	Commissioning for HVAC
030.23.09	HVAC Instrumentation & Controls
030.23.20	HVAC Piping & Pumps
030.23.30	HVAC Air Distribution
030.23.50	Central Heating Equipment
030.23.60	Central Cooling Equipment
030.23.70	Central HVAC Equipment
030.26	Electrical
030.26.05	Common Work Results for Electrical
030.26.10	Medium Voltage Electrical Dist
030.26.20	Low-Voltage Distribution
030.26.30	Facility Elec Pwr Gen & Sto Equip
030.26.50	Lighting
030.27	Communications
030.27.00	Communications
030.27.20	Data Communications
030.27.40	Audio Video Communications
030.28	Electronic Safety and Security
030.28.10	Elec. Access Control\Intrusion Det
030.31	Earthwork
030.31.00	Earthwork
030.31.10	Site Clearing
030.31.10.00B	Site Clearing (BTL)
030.31.23.16B	Rock Excavation & Hauling (BTL)
030.31.23.23B	Fill (BTL)
030.31.60	Foundation & Load Bearing Elements
030.31.62.13B	Prestressed Concrete Piles (BTL)
030.31.62.16B	Steel H Piles (BTL)
030.31.71.16B	Rock Drilling & Blasting (BTL)
030.31.72.13B	Rock Reinf & Initial Support (BTL)
030.32	Exterior Improvements
030.32.01	Site Restoration & Rehabilitation
030.32.10	Bases\Ballasts\Pavements\Appurt.
030.32.30	Site Improvements & Amenities
030.32.30.00B	Site Improvements (BTL)

030.32.31.19B	Dec. Metal Fences & Gates (BTL)
030.32.32.13B	Cast-in-Place Retaining Walls (BTL)
030.32.32.23B	Segmental Retaining Walls (BTL)
030.32.90	Planting
030.33	Utilities
030.33.00	Utility Services
030.33.40	Storm Drain Utilities
030.80	Construction Allowance
030.80.01	Allowances – Utilities
030.80.02	Allowances - Environmental
030.80.03	Allowances – Unforeseen Conditions
030.80.04	Allowances - Other
030.85	TCU Fit-Out Costs
030.90	Construction C.O. Contingency
030.95	Construction Claims Contingency
040	**FFT&E - Furniture**
040.10	FFT&E – Technology
050	**Technology**
060	**Project Contingency**
070	**Other Costs, Direct**
070.10	DOE Fees
070.20	Utility Connections
070.30	Municipal Fees
070.40	DCA Fees
070.50	Legal Fees
070.55	PM Misc Expenses
070.56	Legal Litigation Services
070.60	Grants
070.65	CM Goods & Services
070.70	Other Direct Costs

070.80	Other Insurance
070.90	Commissioning
080	**Temporary Space**
080.10	Temporary Classroom Units
080.20	Leased Classroom Space
090	**Rebates and Refunds**
090.10	State Refunds
090.20	Federal Refunds
090.30	State Rebates
090.40	Federal Rebates
090.50	Utility Rebates
090.60	Other Rebates
090.70	Insurance Recoveries
090.75	Environmental Cost
090.80	E/O
090.85	Rental Receivables
095	**Claims Mitigation Opportunity**
100	**Local Share Funds**
110	**PMF/CM Fees**
110.10	PM Fees
110.20	CM Fees
110.30	CM Allowances
120	**OCIP**
130	**Other Costs, Indirect**
130.10	SDA G&A
130.20	Safety Service Providers
130.30	Contractor Training Services

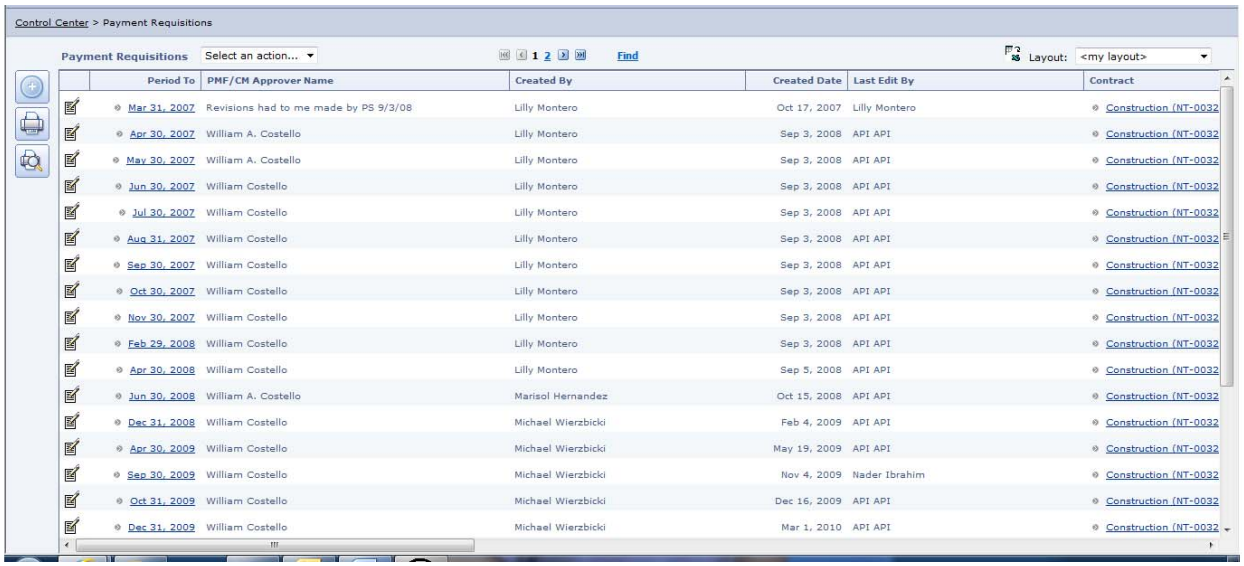
APPENDIX B
Log View Layouts

Layouts are used to define a filter, sort, and group items in a log view. For example, if a user desires to utilize a certain combination of columns repeatedly, a layout can be modified and applied to the relevant log window.

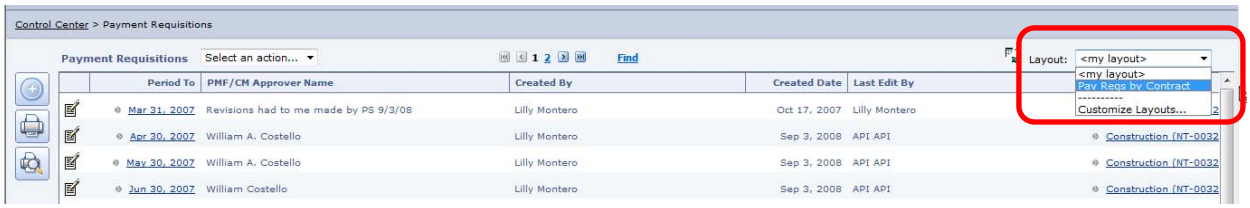
There are a number of custom layouts that have been predefined in the system and are available for use on several log views.

A. Applying a Custom Layout

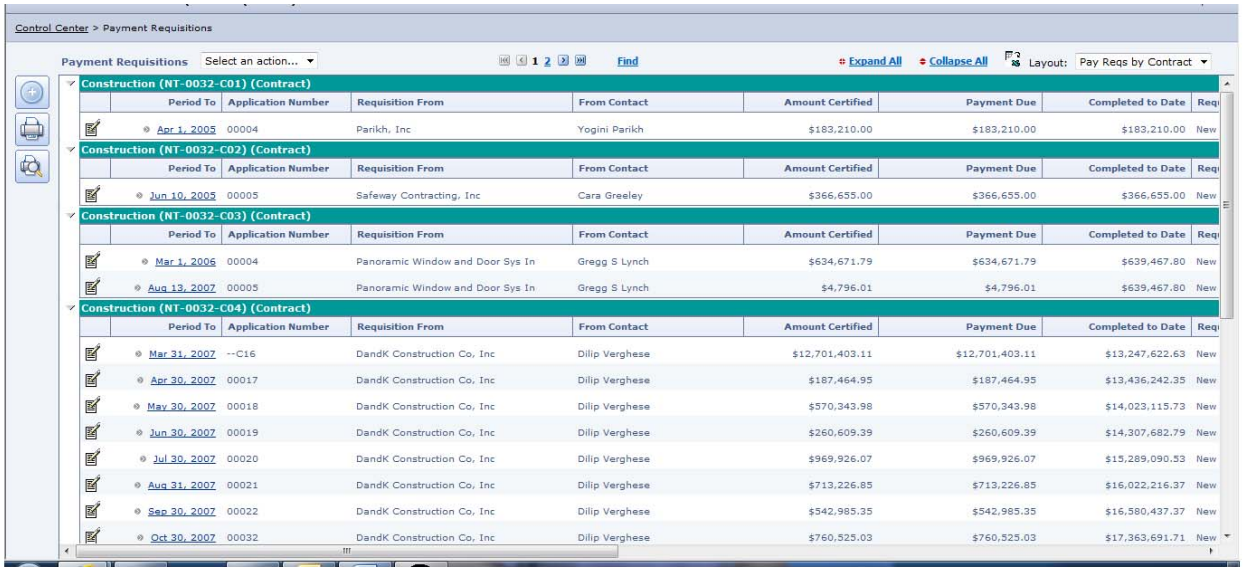
1. In Contract Manager, select the applicable folder from the Control Center. A log view will display. The following example has opened the Payment Requisitions log view.



2. Open the **Layout** pull down menu located in the upper right hand corner of the screen and choose the **Pay Reqs by Contract** option.



3. The Payment Requisitions will now be sorted by Contract number.



4. Use the same procedure to check other log views in Contract Manager to see if customized views have been created by the System Administrator.

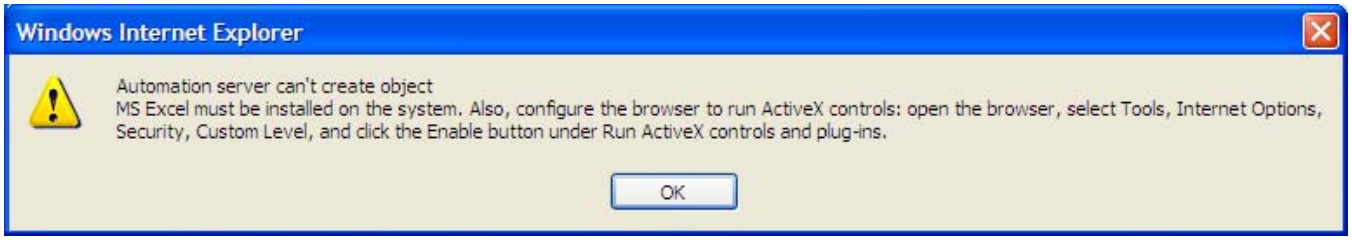
B. Exporting a Log View

The log view will display the overall summary details of the documents contained within that folder. Every log view can be exported to Excel for reporting purposes. Once exported, you can manipulate the summary information to create a customized report.

IMPORTANT: Information can only be exported from Contract Manager. You cannot import or upload information into the system.

1. To export a log view, choose the **Excel icon** located on the upper right hand corner of the screen.

2. If you receive the following error message after you click the icon, perform the steps listed below:

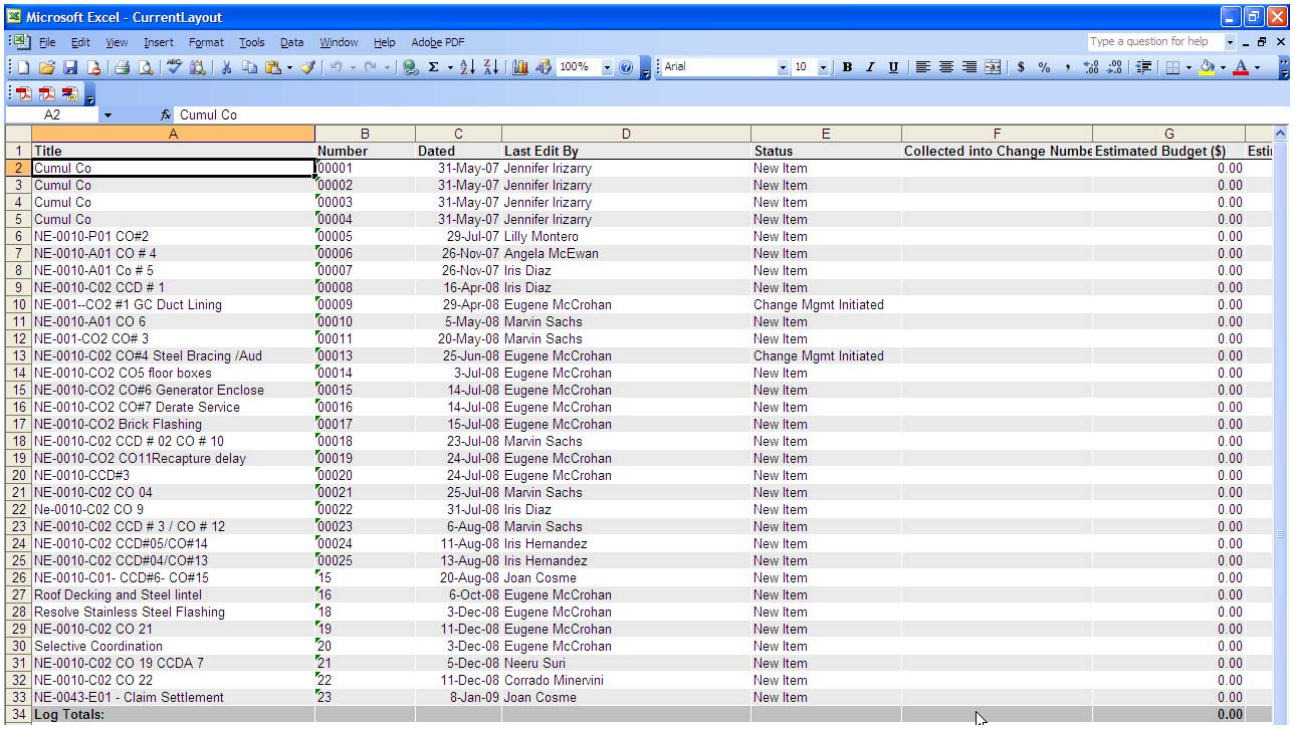


Add http://pe.njsda.gov to Trusted Sites Zone (bookmarks).

a) Go to Tools -> Internet Options -> Security -> Trusted Sites (Green Circle)
b) Click **Sites** Button
c) Uncheck require https: on the bottom of the Trusted Sites page
d) Add http://pe.njsda.gov
e) Close and re-open your browser.

3. If Microsoft Excel still does not open, contact the PE Helpdesk (pehelpdesk@njsda.gov) to assist in troubleshooting your Internet browser settings.

4. If no error message displays, Microsoft Excel will automatically open and display the log view information. You can now manipulate this output as desired to create your customized report.

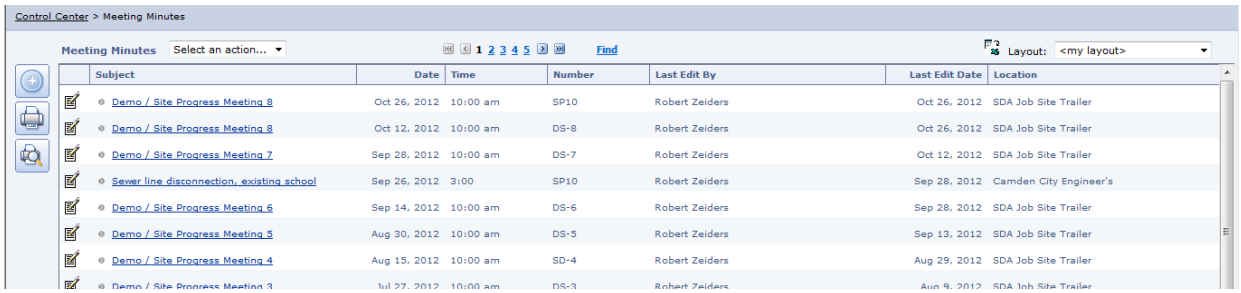


	Title	Number	Dated	Last Edit By	Status	Collected into Change Numbe	Estimated Budget ($)	Esti
2	Cumul Co	00001	31-May-07	Jennifer Irizarry	New Item		0.00	
3	Cumul Co	00002	31-May-07	Jennifer Irizarry	New Item		0.00	
4	Cumul Co	00003	31-May-07	Jennifer Irizarry	New Item		0.00	
5	Cumul Co	00004	31-May-07	Jennifer Irizarry	New Item		0.00	
6	NE-0010-P01 CO#2	00005	29-Jul-07	Lilly Montero	New Item		0.00	
7	NE-0010-A01 CO # 4	00006	26-Nov-07	Angela McEwan	New Item		0.00	
8	NE-0010-A01 Co # 5	00007	26-Nov-07	Iris Diaz	New Item		0.00	
9	NE-0010-C02 CCD # 1	00008	16-Apr-08	Iris Diaz	New Item		0.00	
10	NE-001--CO2 #1 GC Duct Lining	00009	29-Apr-08	Eugene McCrohan	Change Mgmt Initiated		0.00	
11	NE-0010-A01 CO 6	00010	5-May-08	Marvin Sachs	New Item		0.00	
12	NE-001-CO2 CO# 3	00011	20-May-08	Marvin Sachs	New Item		0.00	
13	NE-0010-C02 CO#4 Steel Bracing /Aud	00013	25-Jun-08	Eugene McCrohan	Change Mgmt Initiated		0.00	
14	NE-0010-CO2 CO5 floor boxes	00014	3-Jul-08	Eugene McCrohan	New Item		0.00	
15	NE-0010-CO2 CO#6 Generator Enclose	00015	14-Jul-08	Eugene McCrohan	New Item		0.00	
16	NE-0010-CO2 CO#7 Derate Service	00016	14-Jul-08	Eugene McCrohan	New Item		0.00	
17	NE-0010-CO2 Brick Flashing	00017	15-Jul-08	Eugene McCrohan	New Item		0.00	
18	NE-0010-C02 CCD # 02 CO # 10	00018	23-Jul-08	Marvin Sachs	New Item		0.00	
19	NE-0010-CO2 CO11Recapture delay	00019	24-Jul-08	Eugene McCrohan	New Item		0.00	
20	NE-0010-CCD#3	00020	24-Jul-08	Eugene McCrohan	New Item		0.00	
21	NE-0010-C02 CO 04	00021	25-Jul-08	Marvin Sachs	New Item		0.00	
22	Ne-0010-C02 CO 9	00022	31-Jul-08	Iris Diaz	New Item		0.00	
23	NE-0010-C02 CCD # 3 / CO # 12	00023	6-Aug-08	Marvin Sachs	New Item		0.00	
24	NE-0010-C02 CCD#05/CO#14	00024	11-Aug-08	Iris Hernandez	New Item		0.00	
25	NE-0010-C02 CCD#04/CO#13	00025	13-Aug-08	Iris Hernandez	New Item		0.00	
26	NE-0010-C01- CCD#6- CO#15	15	20-Aug-08	Joan Cosme	New Item		0.00	
27	Roof Decking and Steel lintel	16	6-Oct-08	Eugene McCrohan	New Item		0.00	
28	Resolve Stainless Steel Flashing	18	3-Dec-08	Eugene McCrohan	New Item		0.00	
29	NE-0010-C02 CO 21	19	11-Dec-08	Eugene McCrohan	New Item		0.00	
30	Selective Coordination	20	3-Dec-08	Eugene McCrohan	New Item		0.00	
31	NE-0010-C02 CO 19 CCDA 7	21	5-Dec-08	Neeru Suri	New Item		0.00	
32	NE-0010-C02 CO 22	22	11-Dec-08	Corrado Minervini	New Item		0.00	
33	NE-0043-E01 - Claim Settlement	23	8-Jan-09	Joan Cosme	New Item		0.00	
34	Log Totals:						0.00	

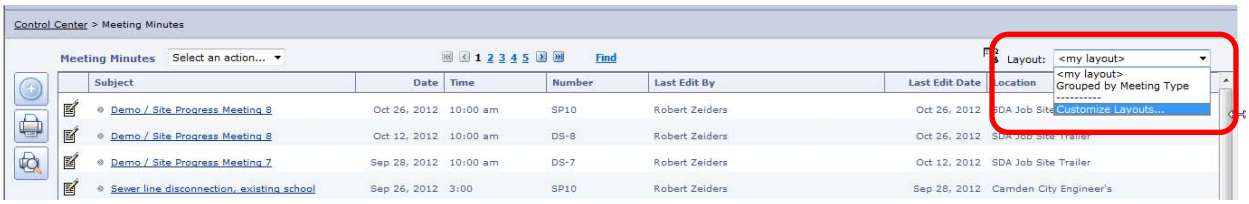
C. Modifying "My Layout"

While you cannot create a new layout, you can modify the **My Layout** option to display desired columns of information. This would be helpful if you are exporting this view to Excel.

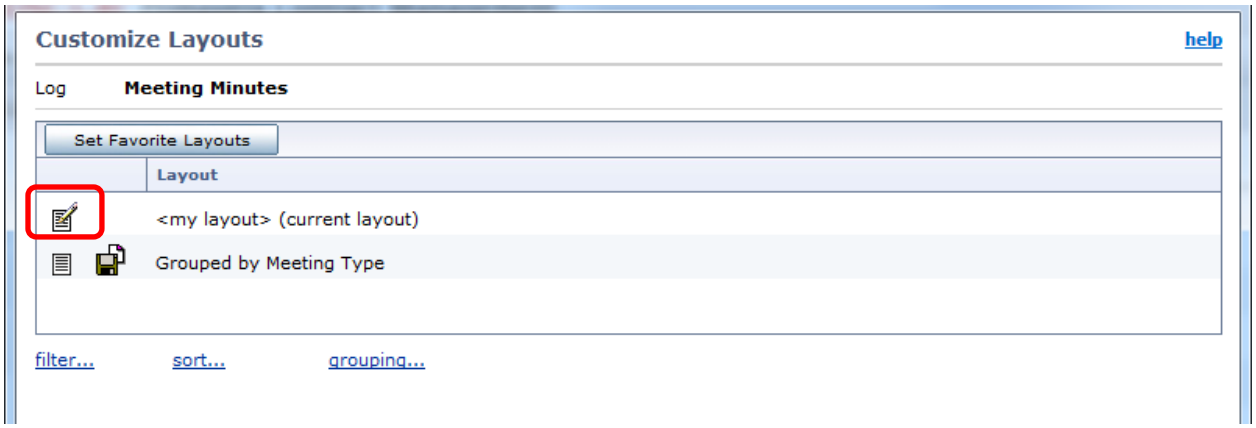
1. In Contract Manager, select the applicable folder from the Control Center. A log view will display. The following example has opened the Meeting Minutes log view.



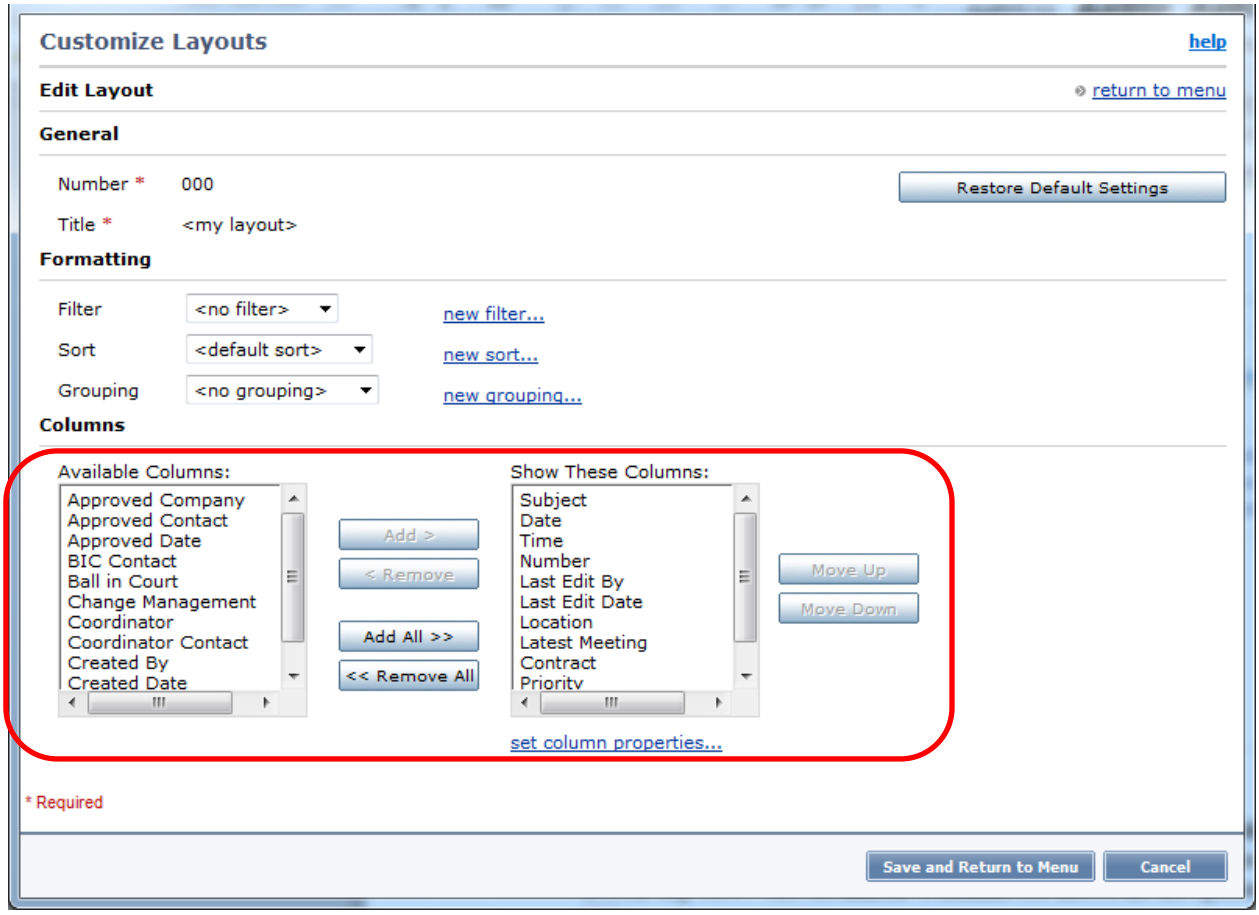
2. Open the **Layout** pull down menu located in the upper right hand corner of the screen and choose the **Customize Layouts** option.



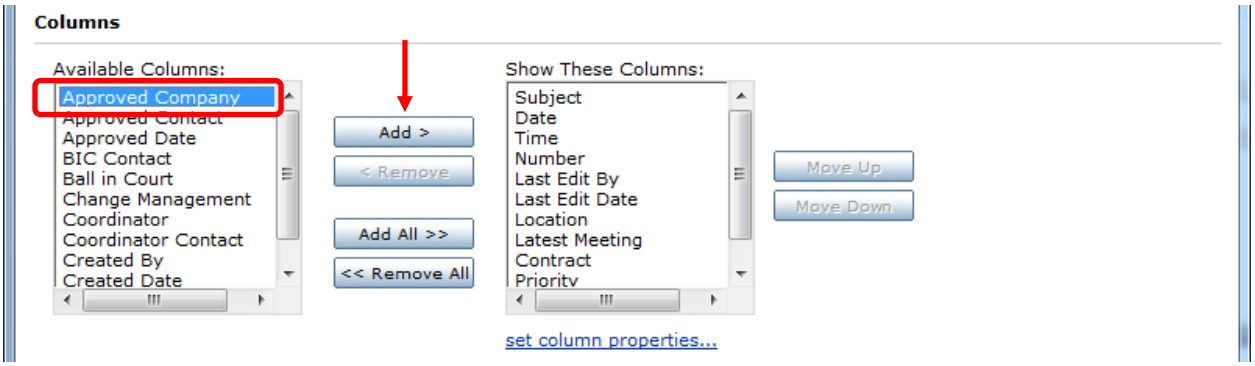
3. The **Customize Layouts** screen displays. Choose the **edit icon** located to the left of the <my layout> option.



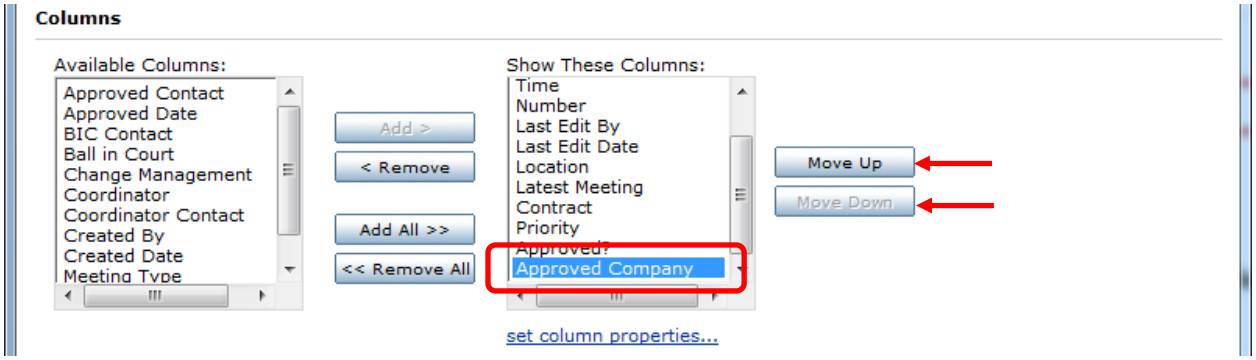
4. The **Customize Layout -> Edit Layout** screen displays. In the **Columns** section of the window are two list boxes: **Available Columns** and **Show These Columns**. The **Show These Columns** list shows the options you currently have listed in your log view. The **Available Columns** list shows all the options you can add to your log view.



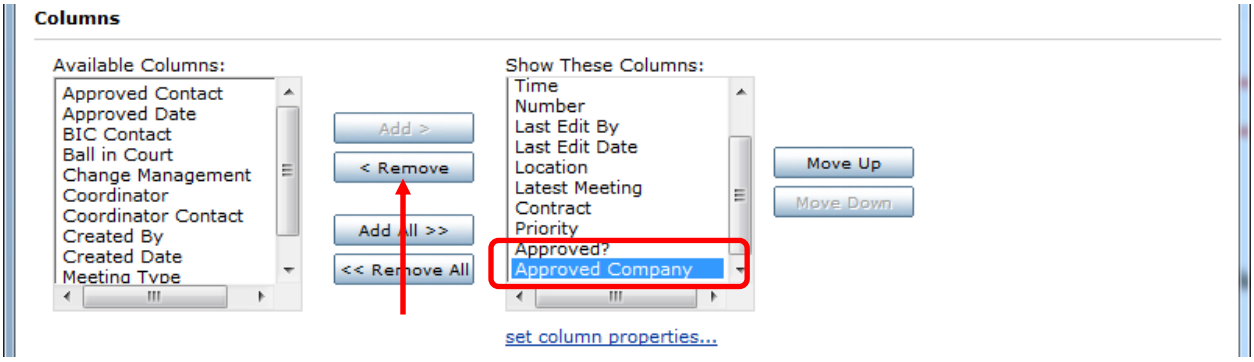
5. To add a new column to the Show These Columns list, highlight an option in the **Available Columns** list, then click the **Add** button.



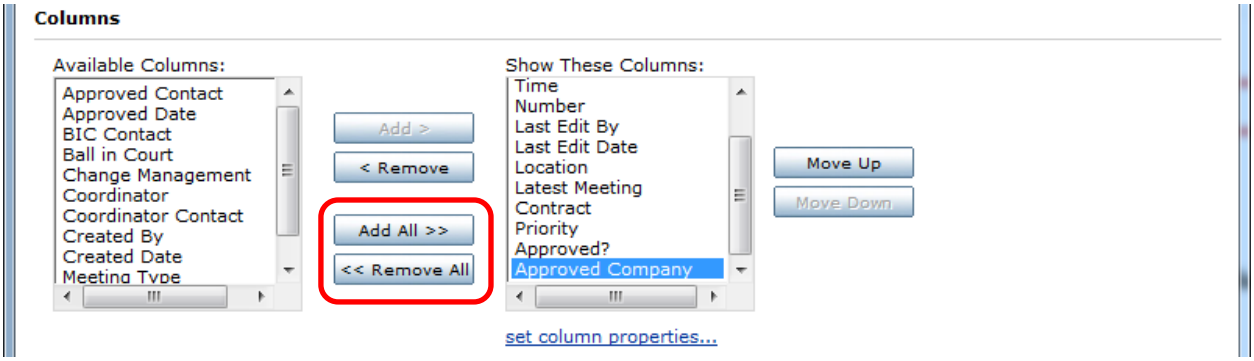
6. The selected column will now appear at the bottom of the list in the **Show These Columns** box. You can change the position of this column by selecting it, then click the **Move Up** or **Move Down** buttons.



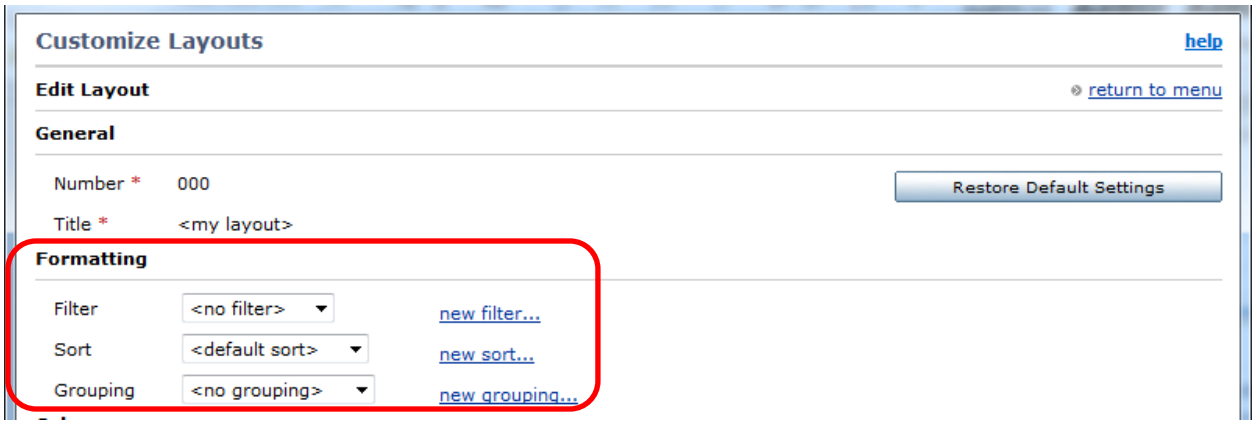
7. Columns can be removed by selecting a column name from the **Show These Columns** list box, then clicking the **Remove** button.



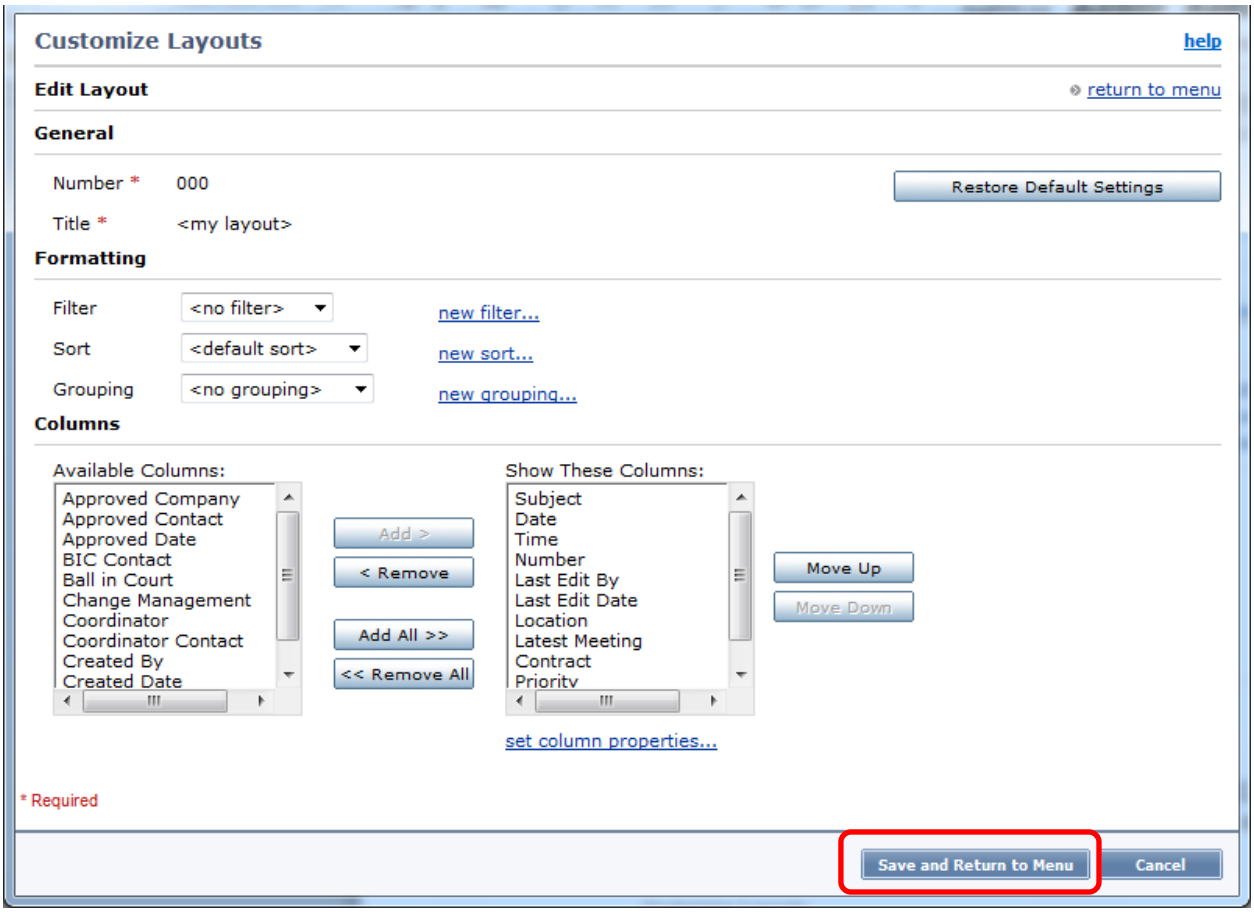
8. You can also add or remove all columns by choosing the **Add All** or **Remove All** buttons.



9. There are also **Formatting Options** available on this screen (Filter, Sort Grouping). If you wish to use one of these options, please contact the Primavera Help Desk **pehelpdesk@njsda.gov** for assistance. These processes are labor intensive and could impact many users if they are done incorrectly.



10. When finished, click the **Save and Return to Menu** button. Any edits you applied will be immediately displayed in the log view.



APPENDIX C
Glossary

Amendment

An amendment to an Agreement (i.e. Design) executed by the SDA and the Professional Services Consultant. SDA Form 301 shall be used for this process.

Authority Agent Recommendation (AAR)

A request for a change in the Construction Contract documents. An AAR may be made by the Corporation or the Contractor. SDA Form 501 shall be used for this process.

Change Order or **Change Order Documentation**

A written order by the Corporation, directing or authorizing some change to the Construction Contract, including, but not limited to, an increase or decrease in the Construction Work, or an acceleration of time for the performance of such Construction Work, or a change in the sequence in which such Construction Work is performed. SDA Form 503 shall be used for this process.

Claim

A demand or assertion by one of the parties seeking, as a matter of right, adjustment or interpretation of Contractual Documents, payment of money, extension of time or other relief with respect to the terms of the Contractual Documents and shall also mean other disputes and matters in question between the parties arising out of or relating to the Contractual Documents.

Contractor Invoice

An affidavit submitted by the Contractor requesting payment, stating that all payrolls, bills for materials and equipment, and other indebtedness connected with the work for which the Owner might be responsible has been paid or otherwise satisfied. The Contractor shall list any indebtedness or known claims in connection with the construction contract that have not been paid or otherwise satisfied. The Contractor shall use SDA Forms 803-816 for required invoice backup documentation.

Contractor Change Request/Authority

A request to the Construction Manager for an estimate on the value of a change. SDA Form 500 shall be used for this process.

Construction Change Directive (CCD)

A written order, directing or authorizing some change, in whatever degree, to the Construction Work but for which compensation has not yet been determined. All parties preparing a Construction Change Directive shall utilize SDA Forms 506 and 506A.

Notice of Claim

A notice submitted by the General Contractor(s) to the NJSDA and/or its agents identifying a claim that is being made to increase or decrease the Contract Sum. The General Contractor(s) shall use and complete SDA Form 505 and 505A for this purpose.

Requests for Information

A request from the Contractor to confirm the interpretation of a detail, specification or note on the construction drawings or to secure a documented directive or clarification, interpretation, or additional information from the architect or owner that is needed to continue work. The Contractor shall use SDA Form 655 for a Request for Information.

SDA Project Manager

One of the SDA's representatives authorized to act on behalf of the SDA with respect to the School Facilities Projects and the Contractual Documents.

Submittal

Documents required to be submitted by the Contractors, including, but not limited to, shop drawings, reports, calculations, product data and samples.

APPENDIX D
Data Field Definitions

SDA Data

Project Team Members	
Program Director	Name of SDA Program Director
SDA Managing Program Officer (S)	Name of SDA Program Officer managing this project (from Key parties above)
General Contractor(GC) (S)	Name of General Contractor (from Key parties above)
Design Consultant (S)	Name of Design Consultant (from Key parties above)
PMF/CM Project Manager (S)	Name of PMF/CM Project Manager (from Key parties above)
Environmental Specialist	Name of outside environmental consultant
Site/Environmental Consultant	Name of outside site/environmental consultant(s)
Pre-Construction GC	Name of Pre-Construction GC, i.e. Demolition, etc.
DOE/DCA Contacts	Names of Department of Education and Department of Community Affairs contacts
Program Officer – Controls	Name of SDA team member responsible for team deliverables tracking
Program Officer – Environmental	Name of SDA team member responsible for environmental issues
Program Officer – Relocation	Name of SDA team member responsible for relocation issues (if applicable)

Data Required for Project Status Report	
Reporting Month	Reporting month for the report
Project Status	Dropdown list indicating active, canceled, completed, legacy or suspended
Project Status Last Updated	Last date that report information was updated
Brief Project Description	Brief description of project scope
Number of Students	Projected number of students included in this school
Grade Alignment	Grade levels included in this school
Project Type	Pull down menu to designate type of project.
Pre-Construction Scope	Pull down menu to designate pre-construction scope, i.e. demolition
Design Delivery Method	Pull down menu to designate design delivery method, i.e. in-house
Construction Delivery Method	Pull down menu to designate construction delivery method, i.e. design-build
Construction Completion %	Percentage of construction completion
Construction Contingency Utilized %	Percentage of construction contingency that has been utilized to date
Project Phase	Pull down menu to designate the current project phase
Sub-Phase	Pull down menu to designate the current project sub-phase
Charter Status	Pull down menu to designate the current charter
Charter Date	Date of current charter
Pre-Construction Status	Pull down menu to designate the current status of pre-construction activities
Land Acquisition Status	Pull down menu to designate the current status of land acquisition activities
Temporary Facilities Status	Pull down menu to designate the current status of temporary facilities activities
CM Procurement Status	Pull down menu to designate the current status of CM procurement activities
FF&E Status	Pull down menu to designate the current status of FF&E activities
Tech Status	Pull down menu to designate the current status of technology activities
Current Status	
Current Status	Comments on the current status of the project
Current Activities & Issues	Comments on current activities and/or issues that my impact project progress
Required Action	Comments on recommended or required actions to address current issues
Due Date	Due dates for resolving outstanding issues
Pre-Design Projected Start (P6)	Projected pre-design start date
Pre-Design Actual Start (P6)	Actual pre-design start date
Pre-Design Projected Finish (P6)	Projected pre-design finish date
Pre-Design Actual Finish (P6)	Actual pre-design finish date
Land Acqu. Projected Start (P6)	Projected land acquisition start date

Land Acqu. Actual Start (P6)	Actual land acquisition start date
Land Acqu. Projected Finish (P6)	Projected land acquisition finish date
Land Acqu. Actual Finish (P6)	Actual land acquisition finish date
Schematic Phase Projectd Start (P6)	Projected schematic phase start date
Schematic Phase Actual Start (P6)	Actual schematic phase start date
Schematic Phase Projected Finish (P6)	Projected schematic phase finish date
Schematic Phase Actual Finish (P6)	Actual schematic phase finish date
Design Projected Start (P6)	Projected design phase start date
Design Actual Start (P6)	Actual design phase start date
Design Projected Finish (P6)	Projected design phase finish date
Design Actual Finish (P6)	Actual design phase finish date
Pre-Construction Projected Start (P6)	Projected pre-construction start date
Pre-Construction Actual Start (P6)	Actual pre-construction start date
Pre-Construction Projected Finish (P6)	Projected pre-construction finish date
Pre-Construction Actual Finish (P6)	Actual pre-construction finish date
Construction Projected Start (P6)	Projected construction start date
Construction Actual Start (P6)	Actual construction start date
Construction Projected Finish (P6)	Projected construction finish date
Construction Actual Finish (P6)	Actual construction finish date
FFT&E Purchasing Projected Start (P6)	Projected FFT&E purchasing start date
FFT&E Purchasing Actual Start (P6)	Actual FFT&E purchasing start date
FFT&E Purchasing Projected Finish (P6)	Projected FFT&E purchasing finish date
FFT&E Purchasing Actual Finish (P6)	Actual FFT&E purchasing finish date
Projected Substantial Completion (P6)	Projected substantial completion date
Actual Substantial Completion (P6)	Actual substantial completion date
Projected Building Occupancy (P6)	Projected building occupancy date
Actual Building Occupancy (P6)	Actual building occupancy date
Projected Project Close-out (P6)	Projected project close-out finish date
Actual Project Close-out (P6)	Actual project close-out finish date
Projected Final Completion (P6)	Projected final completion date
Actual Final Completion (P6)	Actual final completion date
GSF, Addition, DOE	The gross square footage of the addition from the DOE
GSF, Addition, Program ph	The gross square footage of the addition from the program phase
GSF, Addition, Schematic ph	The gross square footage of the addition from the schematic phase
GSF, Addition, Design ph	The gross square footage of the addition from the design phase
GSF, Addition, Construction Doc ph	The gross square footage of the addition from the construction phase
GSF, New Const, DOE	The gross square footage of the new construction from the DOE
GSF, New Const, Program ph	The gross square footage of the new construction from the program phase
GSF, New Const, Schematic ph	The gross square footage of the new construction from the schematic phase

GSF, New Const, Design Doc ph	The gross square footage of the new construction from the design phase
GSF, New Const, Construction Doc ph	The gross square footage of the new construction from the construction phase
GSF, Rehab, DOE	The gross square footage of the rehabilitation from the DOE
GSF, Rehab, Program ph	The gross square footage of the rehabilitation from the program phase
GSF, Rehab, Schematic ph	The gross square footage of the rehabilitation from the schematic phase
GSF, Rehab, Design Doc ph	The gross square footage of the rehabilitation from the design phase
GSF, Rehab, Construction Doc ph	The gross square footage of the rehabilitation from the construction phase

DOE Approval Notes	
DOE Approval Notes	Comments entered by the Project Manager concerning the DOE approval information
DOE PreDev Appr Letter Rcvd (S)	Date predevelopment approval letter received from the DOE
Land Acquisition Approval Rec'd (S)	Date land acquisition approval letter received from the DOE
PPR/PEC Received (S)	Date Preliminary Eligible Cost (PEC) Approval Letter received from the DOE
FEA Approval (S)	Date final educational adequacy approval received from the DOE
FPR/FEC Received (S)	Date Final Eligible Cost (FEC) Approval Letter received from the DOE
DOE IT Approval Received (S)	Date IT approval letter received from the DOE

Land Acquisition Notes	
Land Acquisition Notes	Comments entered by the Project Manager concerning the Land Acquisition notes
Site Feasibility Consultant (S)	Name of the feasibility consultants
NTP Site Feasibility Consultant (S)	Date the feasibility consultant was given the notice to proceed
Completion of Site Feasibility	Date the consultant completed the site feasibility study
SDA Board Approval of Land Acq.	Date of SDA Board approval of land acquisition
Land Acquired Date	Date land was acquired
Tenants Relocation Date	Last date when all tenants were relocated
Type of Temp Space	Pull down selection field to designate the type of temporary classroom space, if required (Swing Space - Leases/Owned, TCUs)

Design Phase Notes	
Design Phase Notes	Comments entered by the Project Manager concerning the Design phase notes
192 Document Submittal Date	Date when the 192 document was submitted to Procurement

192 Notes	Comments applicable to the 192 form
Design Bid Due Date	Date design bid is due
Notice of Design Award Date	Date 'Notice of Design Award' is sent
Design Notice to Proceed Date (S)	Date 'Design Notice to Proceed' is issued
Program Phase Completion Date	Date Program Phase is completed
SDA's Ed Spec/Schem. Submit to DOE	Date SDA transmits Schematic (PEC) Submission to DOE
Design Development Completion Date	Date Design Development Phase is completed
DOE-FEA Submission (60%-70% CDs)	Date SDA transmits Ed Specs/Schematics to DOE for FEA Approval
Construction Doc. Completion Date	Date Construction Documentation Phase is completed

Construction Phase Notes	
Construction Phase Notes	Comments entered by the Project Manager concerning the Construction phase notes
193 Document Submittal Date	The date when the 193 document was submitted to Procurement
193 Notes	Comments applicable to the 193 form
Construction Bid Due Date	Date construction bid is due
Notice of Construction Award Date	Date 'Notice of Construction Award' is sent
Construction Notice to Proceed (S)	Date 'Construction Notice to Proceed' is issued
Project Kickoff Date	Date of Project Kickoff Meeting
Actual Start Date	Date project actually kicked off
170 IT Form Submission	Date IT form 170 submitted
170 FFE Form Submission	Date FFE form 170 submitted
FFE Coordination Meeting	Date of first FFT&E coordination meeting
Facility Ready for FFE Delivery	Date facility ready for FFT&E delivery
FF&E Delivery Start Date	Date FFT&E delivery started
Grossing Factor	Grossing Factor is used for calculating estimated construction costs

Data Required for Emergent Projects	
(EP) Anticipated Design Completion	Anticipated design completion date
(EP) Anticipated Constr Completion	Anticipated construction completion date
(EP) Initial Cost Estimate ($)	Order of Magnitude Estimate done by Project Teams and CMD
(EP) Impact Reserve Review Date	Review to determine if there is adequate funding to complete the project.
(EP) Preliminary Eligible Cost ($)	Preliminary Eligible Cost amount per DOE approval letter
(EP) Final Eligible Cost (S) ($)	Final Eligible Cost amount per DOE approval letter - should match Total Project Cost field (for Delegated projects, this would come from SIMS)
(EP) Total Project Cost (S) ($)	Total Project Cost (for Delegated projects, this would come from SIMS)
(EP) Design Phase Assignment Exec	Date assignment of design to Emergent Architect has been executed
(EP) Schematic Submit to A/E	Date Project Team transmits Schematic (PEC) Submission to A/E staff for review
(EP) Schematic Submit to Cap Planning	Date A/E transmits Schematic (PEC) Submission to SDA's DOE liaison for forwarding to DOE
(EP) Date Sent to DCA	Date drawings are submitted to DCA for review. This field may also have an N/A if DCA submission is not required.
(EP) Date Approved by DCA	Date DCA approves (releases) drawings for use in Bid Documents. This field may also have an N/A if DCA submission is not required.
(EP) 193 Draft Review Complete	Date 193 draft review is complete
(EP) 193 Exec Signature Date	Date VPs review and approve 193 to advance to Procurement for advertisement
(EP) Construction Advertisement (S)	Date Construction advertisement is posted, or GC Task Order Consultant is assigned or Pool of Contractors is notified of bid opportunity
(EP) Board Memo/Charter/FEC Drafted	Date all draft documents are prepared and forwarded for comment
(EP) FEC Recommendation to DOE	Date SDA transmits Final Eligible Cost Recommendation to DOE
(EP) FEC Recommendation to Cap Planning	Date Final Eligible Cost Recommendation Letter is transmitted to SDA's DOE liaison for signature and advancement to DOE
(EP) Exec Release of Funds/Charter	Date Release of Funds Memo and Charter is transmitted to VPs for review to advance to CEO or Board for approval
(EP) CEO/Board Release Fund/Charter	Date approval received from either CEO or SDA Board of Directors for Release of Funds from Project Reserve and the Project Charter to advance the project to construction.

Smart Start Rebate Notes	
Smart Start Rebate Notes	Comments entered by the Project Manager concerning the Smart Start rebate information
Have Smart Start criteria been met?	Check box to indicate whether criteria has been met
Application Prepared by AE	Date application prepared by AE
Application submitted to Utility	Date application submitted to utility
Application Approved by Utility	Date application approved by utility
Proof of installation provided	Date proof of installation provided
Reapplication if required	Date of reapplication
Proof of Installation Approved	Date proof of installation approved
Rebate Received	Date rebate received

E-Rate Notes	
E-Rate Notes	Comments entered by the Project Manager concerning E-Rate information
E-Rate Form 470 Submission	Date form 470 submitted
E-Rate Contractor Procured	Date e-rate contractor procured
E-Rate Contractor Name	Name of e-rate contractor
E-Rate Form 471 Submission	Date form 471 submitted
E-Rate Approval/Start E-Rate Constru	Date e-rate approval and start of construction
E-Rate Equipment Purchase	Date e-rate equipment purchased
E-Rate Extension	Date of e-rate extension
End E-Rate Construction	Date e-rate construction ended
E-Rate Reapplication, if required	Date of e-rate reapplication
E-Rate Billing	Date of e-rate billing
E-Rate Refund Receipt	Date e-rate refund received

Other Data Pushed From SIMS	
Project Short Name (S)	Name of project
Project Number (S)	SDA assigned Project Number
Package Number (S)	SDA assigned Package Number
Project Address (S)	Address of School
Legislative District (S)	Legislative District(s) numbers where school is located
Congressional District (S)	Congressional District(s) numbers where school is located
County Name (S)	County where school is located
School District (S)	School District Name
District Type (S)	Type of funding the district receives
School Type (S)	Type of project facility (Pre-school, Elementary School, Middle School, High School, etc.)
Number of ECC Classrooms (S)	Number of early childhood center classrooms
Emergent Project (S)	Checkbox to designate if this is an emergent project
Grant Component? (S)	Checkbox to designate if this project has a grant component
SDA Managed? (S)	Checkbox to designate if this is an SDA managed project
District Aid Percentage (DAP) (S)	State funding percentage defined for each District
Temp Space Required (S)	Checkbox to show if temporary space is required for this project
# of TCU Units (S)	Number of temporary classroom units
Capital Plan (S)	Designates the Capital Plan that includes this project (currently only 2008 defined)
Substantial Completion Year (S)	Year the project reached substantial completion (based on the substantial completion date entered above)

Historical Data (Fields no longer used)	
RES Regional Manager (S)	Name of Real Estate Services Regional Manager (from the RES database)
RES Specialist (S)	Name of Real Estate Services Specialist (from the RES database)
RES Legal Assistant (S)	Name of Real Estate Services Legal Assistant (from the RES database)
SDA Regional Office (S)	Location of SDA Regional Office
Schedule Delays	Pull down selection field to designate the severity of any schedule delays (None, Minor, Major)
Level of Concern for Critical Issues	Pull down selection field to designate the level of concern for critical issues (No Concern, Cautionary, Critical)
Land Acq. Required? (check for yes)	Check box to indicate if land acquisition is required for this project
Land Acquisition % Complete	Percentage completion of the land acquisition process
Remediation % Complete	Percentage completion of the remediation process
Remediation Compl (Projected/Actual)	Projected or Actual Date that remediation is complete
Design Restart (Projected/Actual)	Projected or Actual Date that design re-start begins
Design Restart (Check if actual)	Check box to indicate if design re-start date entered is the actual date (determines how it appears on the Project Status report)
Design % Complete	Percentage completion of the design process
Construction % Complete	Percentage completion of the construction process
Final Completion (Check if Actual)	Check box to indicate if construction completion date entered is the actual date (determines how it appears on the Project Status report)
Executive Team Notes	Comments entered by the Executive Staff concerning the project. It is recommended that new notes are added at the beginning of this field, along with a date.
Executive Team Action Items	Comments entered by the Executive Staff concerning assigned action items. It is recommended that new notes are added at the beginning of this field, along with a date.
Data Reqd for Project Close-out	Check box to indicate if this data is required for project close-out
Temporary CO Date	Date Temporary Certificate of Occupancy is awarded
Certificate Of Occupancy	Date Certificate of Occupancy is awarded
Contract Close-Out	Date Primary Construction Contract is completed
Deed Transfer	Date deed is transferred to the district
School Transfer	Date school is transferred to the district
Project Close Out Initiated	Date Project Close Out checklist is created to monitor close out process
Project Close Out Date	Date Project Close Out checklist is completed
DCA Review Notes	Comments relating to DCA review of the design documents
Sub-Phase Completion Date	Date the project sub-phase is complete

Data Pulled from P6 Scheduler		
Pre-Design BL Start (P6)		Baseline pre-design start date
Pre-Design BL End (P6)		Baseline pre-design end date
Pre-Design PROJ Start (P6)		Project pre-design start date
Pre-Design PROJ End (P6)		Project pre-design end date
Real Estate BL Start (P6)		Baseline real estate start date
Real Estate BL End (P6)		Baseline real estate end date
Real Estate PROJ Start (P6)		Project real estate start date
Real Estate PROJ End (P6)		Project real estate end date
Design BL Start (P6)		Baseline design start date
Design BL End (P6)		Baseline design end date
Design PROJ Start (P6)		Project design start date
Design PROJ End (P6)		Project design end date
Pre-Constr BL Start (P6)		Baseline pre-construction start date
Pre-Constr BL End (P6)		Baseline pre-construction end date
Pre-Constr PROJ Start (P6)		Project pre-construction start date
Pre-Constr PROJ End (P6)		Project pre-construction end date
Construction BL Start (P6)		Baseline construction start date
Construction BL End (P6)		Baseline construction end date
Construction PROJ Start (P6)		Project construction start date
Construction PROJ End (P6)		Project construction end date
School Opening BL (P6)		Baseline school opening date
School Opening Current (P6)		Current school opening date

Name	Descriptions
Issues	
Title	Title of the issue
Issue Code	Unique identifier for the issue. This field is only editable when creating a new issue. It should be created to allow for all issues to be easily sorted by this code.
Number	Unique system generated number for this document. This number should not be changed.
Opened	Date issue was opened
Closed	Date issue was closed
Contract	Contract number associated with this issue
Status	
Status	Status of the issue
Priority	Priority level of the issue (High, Normal or Low)
Ball in Court	Contact currently responsible for the issue
Linked Documents	
Date Linked	Date document was linked to the issue
Linked Document	Title of the linked document
Type	Type of linked document (such as Change Order, Meeting Minutes, Transmittal, Daily Construction Report, Payment Requisition, etc.)
Dated	Date of linked document
Linked Change Management Document	If linked document created from Change Management, number of Change Management document
Original Status	Linked document's status when it was linked to the issue
Current Status	Current status of the linked document. This will automatically update when the status is changed in the linked document.
Spec Section	Construction Specification Index (CSI) reference to the linked document
Original Value	Not currently used
Current Value	For Change Management documents, current value of the linked document. This will automatically update when the value is changed in the linked document. Will display zero for other documents that do not have a value.
SDA Data	
Description	Description of the issue
Attachments	
Attachment	Name(s) of the attached file(s) linked to this issue
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded

File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Transmittal	
To	Name of contact receiving this transmittal. For a close out transmittal, will be set to "To Be Determined"
From	Name of contact creating the transmittal. For a close out transmittal, will be set to "To Be Determined"
Number	Document number for this transmittal. Contract Manager automatically assigns the next available number. For a close out transmittal, document number will be "CL1".
Date	Date of the transmittal
Review Status (*Not used for close out*)	
Ball in Court	Contact currently responsible for the transmittal
Priority	Priority level of the transmittal (High, Normal or Low)
Items (*Not used for close out*)	
Item No	Identification number of the item in the transmittal
Copies	Number of copies included with the transmittal
Date	Date the item was created
Status	Status of the transmittal item
Linked Doc	Title of the related submittal document linked to this transmittal item
Paper Size	Paper size of any drawing included with this transmittal item
Description	Description of the transmittal item
We Are Sending (*Not used for close out*)	
Shop Drawing	Checkbox to indicate if a shop drawing is included in this transmittal (check indicates "yes")
Plans	Checkbox to indicate if plans are included in this transmittal (check indicates "yes")
Letter	Checkbox to indicate if a letter is included in this transmittal (check indicates "yes")
Samples	Checkbox to indicate if samples are included in this transmittal (check indicates "yes")
Prints	Checkbox to indicate if prints are included in this transmittal (check indicates "yes")
Specifications	Checkbox to indicate if specifications are included in this transmittal (check indicates "yes")
Change Order	Checkbox to indicate if a change order is included in this transmittal (check indicates "yes")
Copies Corrected Print	Enter the number of corrected copies for print included in this transmittal
Copies for Approval	Enter the number of copies for approval included in this transmittal

Copies for Distribution	Enter the number of copies for distribution included in this transmittal
Other	Checkbox and entry field to specify your own description of an item included in this transmittal (check indicates "yes")
Submitted For (*Not used for close out*)	
Approval	Checkbox to indicate that the transmittal is submitted for approval (check indicates "yes")
Your Use	Checkbox to indicate that the transmittal is submitted for the use of the recipient (check indicates "yes")
As Requested	Checkbox to indicate that the transmittal is submitted to the recipient as requested (check indicates "yes")
Review and Comment	Checkbox to indicate that the transmittal is submitted for review and comment (check indicates "yes")
Sent Via (*Not used for close out*)	
Attached	Checkbox to indicate that the transmittal was sent as an attachment to this document (check indicates "yes")
Separate Cover Via	Checkbox and entry field to indicate that the transmittal was sent by a separate cover (check indicates "yes" - enter the method of delivery in the field)
Shipping Company	Name of company transporting the transmittal (FedEx or UPS)
Tracking Number	Delivery package number assigned by shipping company
Actions Taken (*Not used for close out*)	
Approved as Submitted	Checkbox to indicate that the transmittal is submitted and approved (check indicates "yes")
Returned	Checkbox to indicate that the transmittal is being returned (check indicates "yes")
Approved as Noted	Checkbox to indicate that the transmittal is approved as noted (check indicates "yes")
Returned After Loan	Checkbox to indicate that the transmittal is being returned after it was loaned for review (check indicates "yes")
Submit	Checkbox to indicate that the transmittal is being submitted (check indicates "yes")
Returned for Corrections	Checkbox to indicate that the transmittal is being returned and requires corrections (check indicates "yes")
Resubmit	Checkbox to indicate that the transmittal is being resubmitted for review (check indicates "yes")
Due Date	Checkbox and text field to indicate when action on the transmittal is needed (check indicates "yes")

Remarks (*Not used for close out*)	
Remarks	Any applicable comments about the transmittal
Distributions (*Not used for close out*)	
Distributions	Additional contacts who should receive a copy of the transmittal
Details (*Not used for close out*)	
Reference	Information about document(s) associated with the transmittal
Additional Reference	Additional information about document(s) associated with the transmittal
Contract	Contract number associated with this transmittal
Copies To	Name(s) of the contact(s) receiving copies of the transmittal
Attention	Name of the recipient of the transmittal
Signed	Name of the creator of the transmittal
SDA Data (*Used for close out only*)	
Substantial Completion Phase	
Temp Certificate of Occupancy	Date the temporary certificate of occupancy was received
TCO Expiration Date	Date the temporary certificate of occupancy expires
CO/CA	Date the certificate of occupancy or certificate of acceptance was received
Reviewed Deliverables Received	Date of review for received deliverables (FFT&E Binders & Warranties received, O&M manuals reviewed contact list, training and videotapes logged)
O&M Transmitted to District	Date operations and maintenance (O&M) documents were delivered to the District
- HVAC	Date Heating Ventilation and Air Conditioning (HVAC) manual was delivered to the District
- Elevators	Date elevator manual was delivered to the District
- Phones and Intercoms	Date phone and intercom manual was delivered to the District
- Fire Alarms	Date fire alarm manual was delivered to the District
- Security / Cameras	Date security/camera manual was delivered to the District
- Building Controls (centralized)	Date building controls manual was delivered to the District
- Kitchen Equipment	Date kitchen equipment manual was delivered to the District
- Mechanical Systems	Date mechanical systems manual was delivered to the District
- Auditorium	Date auditorium manual was delivered to the District
- Other (3 fields)	Date(s) of any other manual(s) delivered to the District
O&M Training Logs to District	Date the operations and maintenance(O&M) training logs and videotapes were submitted to the District

Warranties, Guarantees, Contact	Date warranties, guarantees and contact lists were submitted to the CM/PMF
Attic Stock Delivery Trans Date	Date the attic stock and maintenance supply delivery transmittal was delivered to the district
Punch List Transmittal Date	Date of the punch list transmittal
Cert. of Insurance Coverage	Date the certificate of insurance was received
Insurance Certificate Expiration	Date the certificate of insurance expires
NJSDA 701 - Cert. of Sub Comp	Date the certificate of substantial completion was signed
13D, Schedule 1-M Maint	Date the 13D, schedule 1-M maintenance agreement was signed
13C Exhibit E	Date the 13C Exhibit E document was executed
Land Transfer (Y/N)	Checkbox to indicate if land has been transferred (check indicates "yes")
Affidavit of Consideration	Date the affidavit of consideration was received
Seller's Residency Cert/Exempt	Date the seller's residency certification/exemption was received
Boundary Survey w/Legal Desc	Date the boundary survey with legal description was performed
Deed Conveyance	Date of deed conveyance
Environmental Cond Exist (Y/N)	Checkbox to indicate if environmental conditions exist (check indicates "yes")
DEP Deed Notice	Date the DEP deed notice was received
NFA Partial Site	Date of the No Further Action(NFA) partial site notice
NFA Whole Site	Date of the No Further Action (NFA) whole site notice
BOE Resolution for Transfer	Date of the Board of Education (BOE) resolution authorizing transfer
Building & Land Transferred	Date the building and land was transferred
Notes	Any applicable notes about the substantial completion phase
Final Completion Phase	
CO/CA	Date the certificate of occupancy or certificate of acceptance was received
NJSDA 710 - Const Contract Final	Date construction contract final completion document was received
NJSDA 711 - Design Contract Final	Date design contract final completion document was received
NJSDA 713 - CM/PMF Final Compl	Date CM/PMF final completion document was received
13 C Exhibit F	Date 13 C Exhibit F was executed
Notes	Any applicable notes about the final completion phase
Contract Close-Out Phase	
FFT&E Contract	Date of the Furniture, Fixtures, Technology and Equipment (FFT&E) contract

FFT&E Invoice Payment List	Date the Furniture, Fixtures, Technology and Equipment (FFT&E) invoice payment list was received
FFT&E Manufacturers Invoice	Date the Furniture, Fixtures, Technology and Equipment (FFT&E) manufacturers invoice was received
Real Estate Payments	Date the Real Estate payments were received
Tenants/Owners Reloc Comp Conf	Date of the relocation compensation confirmation
Term/Paymt for Property Maint	Date of the term/payment for property maintenance
Term/Pay for Temp Space/Lease	Date of term/payment for temporary space/leases and insurance
NJSDA 803 Final Contractor Inv	Date the final contractor invoice was paid
NJSDA 804 Final Consult Inv AE	Date the final AE invoice was paid
NJSDA 805 Fin Consult Inv CM	Date the final CM/PMF consultant invoice was paid
NJSDA 821 Final Waiver and Rel	Date the final waiver and release was paid
NJSDA 521 Final Cont Perf Eval	Date the final contractor performance evaluation was completed and approved
All De-oblig proc & OMR Zero'd	Date all de-obligations were processed and the OMR was zeroed out
Verified Claim Status	Date Chief Counsel's office verified that there were no claims against this project
Charter Reconciliation	Date the close out charter was approved
$'s Added to General Fund($)	Amount of money added to the project's general fund
Notes	Any applicable notes about the contract close out phase
Issues	
Issue Title and Code	Name and associated code for any issue linked to this transmittal
Attachments	
Attachment	Name(s) of the attached file(s) linked to this transmittal
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Request for Information (RFI)	
Type	Designates type of document. Will always be RFI.
To	Name of PMF/CM receiving this RFI
From	Name of GC creating the RFI
Number	Document number for this RFI. Contract Manager automatically assigns the next available number.
Date	Date of the RFI
Title	Description of the RFI
Review Status	
Do not check or this document will need to be deleted	Checkbox must be left unchecked
Document Owner	Not currently used
Ball in Court	Contact currently responsible for the RFI
Priority	Priority level of the RFI (High, Normal or Low)
Status	Status of the RFI
Closed?	"No" indicates the RFI is in process of review; "Yes" indicates that the review of the RFI is completed and the document is closed.
Closed By	Name of the contact who closed and saved the RFI, and the date of approval. Default will be the name of the person who created the RFI in Contract Manager.
Question	
Work Impact	Indicates how this RFI may impact work progress (No, Unknown, Yes-Work Impeded, Yes-Work Stopped)
Reason for Request for Information	Reason code related to this RFI (Owner-Initiated Change, Diff Site Conditions, Delay-Claims Only, Design Consultant E/O (COs), GC Error (Amendments))
Question	Details and/or questions concerning the RFI
Question Signed By	Name of the person completing the question section
Date	Entry date for the person completing the question section
Required Date	Required response date
Question Distribution	Additional contacts for distribution of the question section
Proposed Solution	Any possible solution for the problem described in the RFI
Answer	
Answer	Response to the question section of the RFI, instructions to A/E

Answer Signed By	Name of the person completing the answer section
Date	Entry date for the person completing the answer section
Responded Date	Date the question was answered
Cost Impact	Anticipated cost impact for this RFI (Yes, No, Unknown)
Cost ($)	Estimated cost to implement the change for this RFI
Schedule Impact	Anticipated impact to the project schedule (Yes, No, Unknown)
Answer Distribution	Additional contacts for distribution of the answer section
Details	
Spec Section	Construction Specification Index section to link to this RFI
Contract	Contract number associated with this RFI
Reference	Title of another Contract Manager document within this project to link to this RFI
Change Management Number	If Change Management is initiated from this document, the Change Management document number will automatically display in this field. This field is not editable.
Architect Number	Number of the corresponding document from the Architect, if applicable
Subcontractor Name	Name of the subcontractor associated with this RFI
Subcontractor Number	Number of the corresponding document from the Subcontractor, if applicable
Drawings	
Section not currently used	Not currently used
Schedule (*Data fields applicable if project is linked to a P6 schedule*)	
Activity ID	Associated P6 schedule activity linked to this RFI
Start	Start date of the activity
Finish	End date of the activity
Time Change (days)	Indicates the number of days the RFI affects the project schedule
SDA Data	
Does this RFI impact Educ Adequacy?	Checkbox to indicate if this RFI will impact the Educational Adequacy of the school as determined by DOE's "Facilities Efficiencies Standards" which includes grade levels, educational objectives, programs and services (check indicates "yes").

Issues	
Issue Title and Code	Name and associated code for any issue linked to this RFI
Attachments	
Attachment	Name(s) of the attached file(s) linked to this RFI
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Notices	
Type	Type of notice. Options include Bulletin, Change in Condition, Change Sketches, Contractor Claim, DCA Permit, New Project, and Proceed Notice. This will default to "Bulletin", but should always be changed to "Contractor Claim".
To	Name of contact in SDA Chief Counsel's office receiving this claim
From	Name of Contractor submitting the claim
Number	Document number for this claim. Contract Manager will automatically assign the next sequential number to the document.
Date	Date the notice was received by Chief Counsel's office
Title	Brief description of the nature of the claim
Review Status	
Ball in Court	Contact currently responsible for the claim
Priority	Priority level of the claim (High, Normal or Low)
Status	Status of the claim
Description	
Description	Description of the claim
Signed By	Contract Manager automatically populates this field based on the information selected in the From field at the top of the document. This should be changed to the contact who signed the claim.
Date	Date the claim was approved
Details	
Spec Section	Applicable Construction Specification Index (CSI) section linked to this claim
Contract	Contract number this claim is associated with
Cost	Total dollar value for this claim
Required Date	Contract Manager automatically enters seven days from the document creation date, however, this can be manually changed if necessary
Acknowledged Date	Date the response is received from the recipient of the claim
Reference	If applicable, title of another Contract Manager document within this project linked to this claim
Change Management Number	If Change Management is generated from this claim, the Change Management document number will automatically display in this field. This field is not editable.

Reason for Change Order	Reason code related to this claim. For a claim document, "Delay-Claims Only' should be selected. This is a required field.
Schedule	
Activity ID	If a schedule is linked to this project, associated P6 schedule activity linked to this claim
Start	Start date of the activity
Finish	End date of the activity
Time Change (days)	Indicates the number of days the claim affects the project schedule.
Issues	
Issue Title and Code	Name and associated code for any issue linked to this claim
Attachments	
Attachment	Name(s) of the attached file(s) linked to this claim
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Noncompliance Notices	
Type	Will always be Noncompliance Notice
To	Name of contact who is the recipient of the noncompliance notice
From	Name of contact creating the noncompliance notice
Number	Document number for this noncompliance notice. Contract Manager will automatically assign the next sequential number to the document.
Date	Date the noncompliance notice was documented
Title	Brief description of the nature of the noncompliance notice
Review Status	
Ball in Court	Contact currently responsible for the noncompliance notice
Priority	Priority level of the noncompliance notice (High, Normal or Low)
Status	Status of the noncompliance notice
Description	
Reason for Noncompliance Notice	Reason code related to this noncompliance notice (Owner-Initiated Change, Diff Site Conditions, Delay-Claims Only, Design Consultant E/O (COs), GC Error (Amendments))
Description	Description of the noncompliance notice
Signed By *(2 fields)*	Contact(s) who signed the noncompliance notice
Date *(2 fields)*	Date(s) the noncompliance notice was signed
Required Date	Contract Manager automatically enters seven days from the document creation date, however, this can be manually changed if necessary
Corrective Action	
Corrective Action	Description of the steps taken to correct the issue found, as well as any follow up comments
Signed By *(2 fields)*	Contact(s) who signed the corrective action for the noncompliance notice
Date *(2 fields)*	Date(s) the corrective action for the noncompliance notice was signed
Required Date	Contract Manager automatically enters seven days from the document creation date, however, this can be manually changed if necessary
Cost	Estimated amount attributed to implementing the corrective action

Details	
Spec Section	Applicable Construction Specification Index section linked to this noncompliance notice
Area	Area of the site where the issue for the noncompliance notice was discovered (defined at the project level)
Contract	Contract number this noncompliance notice is associated with
Reference	If applicable, title of another Contract Manager document within this project linked to this noncompliance notice
Change Management Number	If Change Management is generated from this noncompliance notice, the Change Management document number will automatically display in this field. This field is not editable.
Schedule	
Activity ID	If a schedule is linked to this project, associated P6 schedule activity linked to this noncompliance notice
Start	Start date of the activity (only applicable if a schedule is linked to this project)
Finish	End date of the activity (only applicable if a schedule is linked to this project)
Issues	
Issue Title and Code	Name and associated code for any issue linked to this noncompliance notice
Attachments	
Attachment	Name(s) of the attached file(s) linked to this noncompliance notice
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Meeting Minutes	
Subject	Brief title of the meeting
Number	Number of the meeting minutes document
Status	
Ball in Court	Contact currently responsible for the meeting minutes
Priority	Priority level of the meeting minutes document (High, Normal or Low)
Approved?	"No" indicates the meeting minutes document is in process of review; "Yes" indicates that the review of the meeting minutes is completed and approved.
Approved By	Name and company of the person who approved the meeting minutes document, and date of approval
This Meeting	
Date	Date of the meeting
Time	Time the meeting began
Location	Place where the meeting occurred
Coordinator	Name of the person who coordinated this meeting
Contract	Contract this meeting minutes document is based on
Change Management Number	Title of the associated master change management record (if initiated from this meeting minutes document)
Latest	Checkbox to indicate if this is the latest meeting
Business Items (*Items discussed at the meeting*)	
No.	Number assigned to the business item
Ball in Court	Contact currently responsible for action on this business item
Status	Status of the business item
Priority	Priority level of this business item (High, Normal or Low)
Description	Description of the business item, including what was discussed and what decisions were made
Due	Date this business item must be completed
Started	Date of the meeting
Completed	Date this business item was completed
Activity ID	Not currently used
Order Code	Order in which this item appears in the Business Items list (Enter 1, 2, etc.)
Additional Description	Additional description of the business item
CSI	Construction Specification Index number for this business item
Revised Due Date	Revised date this business item must be completed

Section Heading	Section heading category for this business item (Administration, Affirmative Action, Budget, Change Order, Claims, Coordination, Design, Design Review, District, Equal Opportunity, Inspections, Invoice & Payments, Next Meeting Date, Open Submittals, Other, Payment Application, Permits, Progress, Quality Assurance, RFI, Safety, Schedule, Submittals, Testing, Two-week look ahead, Utilities)
Attendee	
Attendee	Name of person who attended the meeting
Company	Company name of the attendee
Attended	Checkbox to indicate if the person attended the meeting
Order Code	Order in which this item appears in the Attendee list (Enter 1, 2, etc.)
SDA Data	
Meeting Type	Type of meeting (District, Budget, Change Order, Claims, Coordination, Core Team, Design, Design Review, Other, Progress, Safety, Schedule)
Issues	
Issue Title and Code	Name and associated code for any issue linked to this meeting minutes document
Attachments	
Attachment	Name(s) of the attached file(s) linked to this meeting minutes document
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Permit / DCA Inspections	
Inspections/Permits	Date field (mm/dd/yy). Represents date permits were received or inspections were done.
Description	Description of the permit or description of area of building where inspection took place
Coordinator	Name of coordinator for this document
Status	
Ball in Court	Contact currently responsible for the document
Priority	Priority level of the document (High, Normal or Low)
Inspections/Permits Items	
Item No.	Sequential number assigned by Contract Manager
Opened	Date Inspection/Permit item was started/opened
Required	Date action on this Inspection/Permit item is required. Should be three days after Opened date.
Closed	Date Inspection/Permit item was ended/closed
Ball in Court	Contact currently responsible for the Inspection/Permit item
Priority	Priority level of the Inspection/Permit item (High, Normal or Low)
Status	Current status of the Inspection/Permit item
Notes	Any applicable notes/comments about the Inspection/Permit item
Inspection Of	Identifies the category of the item being inspected (Building, Demolition, Electrical, Elevator, Fence, Fire, Flood Plan Permit, Health & Safety, Mechanical, NJDEP-EO 215, NJDEP-No Further Action Letter, NJDEP-Remedial Action Work Plan (RAWP), Other RES Permits, PA-Preliminary Assessment, Plumbing, Sewer Authority/Local/Regional, Soil Conservation, Stream Encroachment Permit, Street Opening Permit, Structural, TCU, Water Authority)
Inspection Type	Identifies type of inspection (Cancellation, Final, Rough)
Item Type	Identifies item (Inspection, Permit)
Permit Number	Document number of inspection or permit
Issue Title and Code	Name and associated code for any issue linked to this Inspection/Permit item
Attachment	Name(s) of the attached file(s) linked to this Inspection/Permit item
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached

Attached By	Name(s) of the user who attached the file(s)
Details	
Contract	Contract number associated with this Inspection/Permit document
Change Management Number	If Change Management is initiated from this document, the Change Management document number will automatically display in this field. This field is not editable.
Issues	
Issue Title and Code	Name and associated code for any issue linked to this Inspection/Permit document
Attachments	
Attachment	Name(s) of the attached file(s) linked to this Inspection/Permit document
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Safety	
Type	Type of document (Safety Violation or Injury or Illness Report)
To	Name of CM or GC contact receiving document
From	Name of SDA or CM contact creating document
Number	Next sequential number for this document
Date Entered	Date the document is created
Title	Brief description of the violation/injury
Status	
Ball in Court	Contact currently responsible for the document
Priority	Priority level of the document (High, Normal or Low)
Status	Status of the document
Disposition	Disposition of the document (Duplicate, Follow-up Needed, Resolved or Unfounded)
Closed Date	Date document is closed
Required By	Date action on this document is required
Required Actions	Description of actions required to address the violation/injury
Employee	
Company	Name of company responsible for violation or employing injured worker
Name	Name of employee
Gender	Gender of employee
Job Title	Job title of employee
Construction Trade	Work area of specialty for employee
NAICS Code	Code identifying type of industry the violation/hiring company is in
Home Address (only for Injury or Illness Report)	Address of employee
Date of Hire (only for Injury or Illness Report)	Hire date of employee
Date of Birth (only for injury or Illness Report)	Date of birth of employee
Incident	
Location	Location where incident took place
Date of Event	Date incident took place
Time Employee Began Work	Time employee started working
Time of Event	Time incident took place
Employee's Actions before the Incident	Description of employee's actions or behaviors before incident took place
Description of the Incident	Description of incident
New/Recurrence	Indicates if this is a new or recurrent incident

Additional Information	Comments or other descriptions about the incident
Accident Source or Hazard	Cause of incident (Absorption, Bite/Sting; Carrying, throwing or holding object; Caught in, under or between not elsewhere classified; Contact not otherwise specified; Contact with electrical current; Contact with temperature extremes; Falling object or particle; Flying object or particle; From ramp, runway, walkway; From scaffold or ladder; From vehicle/Motor Vehicle/Struck by vehicle; In machine or machine part; Into shafts, excavations, floor openings, etc; Lifting object; Manual handling, not elsewhere classified; Moving or stationary object; Object being handled; Rubbed by or abraided, not elsewhere classified; Pulling or pushing object; Stairs; Struck by or against, not elsewhere classified; Unspecified)
Safety Violations	Possible violations contributing to incident (Hard hats, Power cords, Scaffolds, Hazard Communication, Fall protection, Respiration protection, Lockout-tagout, Powered industrial trucks, Electrical wiring, Machine guarding, Ladders, Electrical general requirements)
Injury or Illness	
Description	Description of injury or illness
Privacy Concern	Indicates if there is a privacy concern involved with the incident
Case Number	Assigned case number for the injury
Injury Type	Type of injury (No injury, Near miss, Injury, Poisoning, Respiratory condition, Skin disorder, All other illnesses)
Object or Substance that Directly Harmed Employee	Description of object or substance that injured employee
Case Classification	Resulting action of employee after injury/illness occurred (Remained at work - transfer; Remained at work - other; Days away from work; Death)
Days on Job Transfer or Restriction	Number of days employee was on job transfer or restriction due to incident
Days Away from Work	Number of days employee was away from work due to incident
Date of Death	Date employee died as a result of incident
Physician's Name	Name of physician treating employee
Treatment Facility	If employee required treatment for injury, name/address of facility
Treated in Emergency Room	Indicates if employee was treated in an emergency room
Hospitalized Overnight	Indicates if employee required admittance to a hospital overnight

Details	
PMF/CM Project Manager	Contract Manager automatically populates this field with the name and company of the PMF/CM
Fine Amount	Amount of fine levied against violating company
Distribution List	
Distributed To	Name of individuals document was sent to
Contact	Name of person receiving the violation/injury document
Date	Date violation/injury document was sent
Remarks	Comments or special directions regarding violation/injury
Actions Taken (*section is not editable*)	
Date	Changes made to the field will be automatically entered in this section and will be retained for historical purposes
Ball in Court	Changes made to the field will be automatically entered in this section and will be retained for historical purposes
Contact	Changes made to the field will be automatically entered in this section and will be retained for historical purposes
Status	Changes made to the field will be automatically entered in this section and will be retained for historical purposes
Required Actions	Changes made to the field will be automatically entered in this section and will be retained for historical purposes
Issues	
Issue Title and Code	Name and associated code for any issue linked to this safety document
Attachments	
Attachment	Name(s) of the attached file(s) linked to this safety document
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Payment Requisitions	
Contract/PO	Contract this requisition is based on
To	This will always be the SDA
From	Company and Contact the requisition is issued from
Period To	Period ending date of this requisition
Application Number	Requisition document number
Review Status	
Document Owner	Not currently used
Ball in Court	Contact currently responsible for the requisition
Priority	Priority level of the requisition (High, Normal or Low)
Certified?	Indicates whether the requisition has been certified (yes or no)
SDA Project Manager/Sr. Project Manager/Regional Director	Indicates status or approval information
Approval 1 Company	This will always be the SDA
Approval 1 Contact	Contact name of the first approver based on the SDA Operating Authority
Application Date	Date the first contact approved the requisition
SDA Regional Director/Vice President	Indicates status or approval information
Approval 2 Company	This will always be the SDA
Approval 2 Contact	Contact name of the second approver based on the SDA Operating Authority
Certification Date	Date the second contact approved the requisition
Payment Date	Date the payment was sent
Check Number	Check number of the payment
Contract Summary	
Original Contract/PO Sum	Original value of the contract
Original Completion Date	Not currently used
Approved Changes	Total value of approved changes on the contract
Revised Contract Sum	Original value of the contract plus the total value of approved changes
Revised Completion Date	Not currently used
Actual to Date	Amount paid on the contract so far
Balance	Balance remaining on the contract
Changes	
Title	Title of all change order documents on this contract
Type	Type of change order document (CCR/A, CP, AAR, CO, CCD)
Change Management	Title of the master change management document
Change Date	Date of the change management document

Approved Date	Approval date of the change order document
Approved Changes	Approved value for the change order document
Pending Changes	Pending value of the change order document if the document is not yet approved
Status	Status of the change order document
Insurance	
Not currently used	
Payment Requisitions	
Period To	Period ending date of every requisition on this contract
Application Number	Requisition document numbers
Amount Certified	Amount certified for each requisition
Completed and Stored to Date	Value of the contract work completed to date on each requisition
Current Payment Due	Value of the amount certified for each billing period
Certified?	Indicates whether the requisition has been certified (yes or no)
Latest	Indicates whether this is the latest requisition for this contract (yes or no)
Submittals	
Title	Title of each submittal for this contract
Package	Title of the submittal package each submittal is included in
Latest Review Cycle	Number of the latest review cycle
Status	Status of the most recent submittal review cycle
Ball in Court	Contact currently responsible for the submittal
Requisition Summary	
Original Contract Sum	Original value of the contract
Net Change	Cumulative value of the approved change orders
Contract Sum to Date	Total of the original contract sum plus net change
Completed and Stored to Date	Value of the contract work completed to date
Percent	Not currently used. Retainage is entered as a dollar amount in the "Total Retainage" field below.
Retainage	Not currently used. Retainage is entered as a dollar amount in the "Total Retainage" field below.
Amount	Not currently used. Retainage is entered as a dollar amount in the "Total Retainage" field below.
Total Retainage	Cumulative value of total retainage
Total Earned - Retainage	Work completed to date less retainage
Previous Amount Certified	Calculated cumulative amount certified from the previous requisition
Tax to Date	Not currently used

Current Payment Due	Calculated value of the current payment for this billing period (= Total Earned - Retainage less Previous Amount Certified)
Percent Complete	Calculated percentage of work completed to date
Balance to Finish + Retainage	Calculated remaining value for this contract + retainage
Amount Certified	Certified amount of payment for this requisition. This should match the "Current Payment Due".
Schedule of Values	
Item Number (A)	Line item number in the schedule of values
Description of Work (B)	Description of individual billing item
Scheduled Value (C)	Total value of each line item
Previous Applications (D)	Total sum of all scheduled values in all previous requisitions to date for each line item
This Period (E)	Value of completed work for the current billing period for each line item
Materials Presently Stored, not in D or E (F)	Not currently used
Completed and Stored to Date D+E+F (G)	Total of previous application+value this period for each line item
Percent Complete G/C	Total percentage of work completed for each line item
Balance to Finish (H)	Remaining value for each line item
Retainage (I)	Not currently used
Retain %	Not currently used
Tax Rate (J)	Not currently used
Activity ID	Not currently used
Cost Code	Cost code assigned to each line item
Log Totals	
C	Total value of original contract sum + change orders. The log total for this column must equal the "Contract Sum to Date" value above.
D	Total value of previous completed and stored to date
E	Total value of completed and stored this period
F	Not currently used
G	Total value of previous application + value this period
Approved Changes	
Previous Additions	Value of increases for approved change orders for the previous billing period
Previous Deductions	Value of decreases for approved change orders for the previous billing period
Current Additions	Value of increases for approved change orders for the current billing period
Current Deductions	Value of decreases for approved change orders for the current billing period

Total Additions	Total value of all increases
Total Deductions	Total value of all decreases
Change Number	Number identifying the current additions and deductions
Change Date	Approval date of the current additions and deductions
Additions	Amount the change orders will add to the contract
Deductions	Amount the change orders will deduct from the contract
Title	Title of the change order documents
SDA Data	
AE/GC/CM Approval Date (required)	Date the AE/GC/CM approved their payment requisition
AE/GC/CM Approver Name (required)	Name of the AE/GC/CM
CPU USE ONLY	
PMF/CM/CPU Received Date (required)	Date submitted payment requisition from AE or GC was received by the PMF/CM/CPU
CPU Reviewer	Name of the CPU Reviewer
Construction Contractor Inv	
803 Construction Cont Inv	Indicates if the construction contractor invoice (803) was received (yes, no, NA)
803a Construction Cont Inv-Proj Bk Out	Indicates if the construction contractor invoice – project break out (803a) was received (yes, no, NA)
810 Schedule of Values	Indicates if the schedule of values (810) was received (yes, no, NA)
803B/804B Sub Cont/Consult Ver Form	Indicates if the subconsultant/consultant verification form (803B/804B) was received (yes, no, NA)
811 Cert of Prime Contract/Consult	Indicates if the certificate of prime contractor or consultant (811) was received (yes, no, NA)
812 Agreement & Bill of Sale	Indicates if the agreement and bill of sale (812) was received (yes, no, NA)
813 Cont Summary of Stored Material	Indicates if the contract summary of stored material (813) was received (yes, no, NA)
820 Partial Waiver and Release	Indicates if the partial waiver and release (820) was received (yes, no, NA)
Insurance Certificate	Indicates if the insurance certificate was received (yes, no, NA)
CD, Prog Photos Proj Sched or Update	Indicates if the CD, program photos, project schedule or updates were received (yes, no, NA)
701 Cert of Substantial Completion	Indicates if the certificate of substantial completion (701) was received (yes, no, NA)
702 Confirmation of Cont Compliance	Indicates if the confirmation of contract compliance (702) was received (yes, no, NA)
814 Consent Surety Reduct/Part Rel	Indicates if the consent of surety to reduction in or partial release of retainage (814) was received (yes, no, NA)
816 Request for Reduct Retainage	Indicates if the request for reduction in retainage (816) was received (yes, no, NA)
710 Const Contr Fin Compl Chklst	Indicates if the construction contract final completion checklist (710) was received (yes, no, NA)

821 Final Waiver & Release	Indicates if the final waiver and release (821) was received (yes, no, NA)
AIA G707 Consent Surety Fin Payment	Indicates if the consent for surety of final payment (AIA G707) was received (yes, no, NA)
Design Consultant Invoice	
804 Design Consultant Invoice	Indicates if the design consultant invoice (804) was received (yes, no, NA)
a) Allowances	Indicates if allowances were received (yes, no, NA)
b) Validate Allowances are paid	Indicates if allowances were paid (yes, no, NA)
c) Validate Credit Amendment Issued	Indicates if credit amendment was issued (yes, no, NA)
804A Design Consul Inv-Proj Bk Out	Indicates if the design consultant invoice – project break out (804A) was received (yes, no, NA)
803B/804B SubCont/Consult Verf Form	Indicates if the subconsultant/consultant verification form (803B/804B) was received (yes, no, NA)
811 Cert of Prime Contract/Consult	Indicates if the certificate of prime contractor or consultant (811) was received (yes, no, NA)
Insurance Certificate	Indicates if the insurance certificate was received (yes, no, NA)
711 Design Cont Fin Compl Chklst	Indicates if the design contract final completion checklist (711) was received (yes, no, NA)
Consultants Invoice	
805 Consultant Invoice	Indicates if the consultant invoice (805) was received (yes, no, NA)
a) Allowances	Indicates if allowances were received (yes, no, NA)
b) Validate Allowances are paid	Indicates if allowances were paid (yes, no, NA)
c) Validate Credit Amendment Issued	Indicates if credit amendment was issued (yes, no, NA)
805A Consul Inv-Proj Bk Out	Indicates if the consultant invoice – project break out (805A) was received (yes, no, NA)
803B/804B SubCont/Consult Verf Form	Indicates if the subconsultant/consultant verification form (803B/804B) was received (yes, no, NA)
811 Cert of Prime Contract/Consult	Indicates if the certificate of prime contractor or consultant (811) was received (yes, no, NA)
Insurance Certificate	Indicates if the insurance certificate was received (yes, no, NA)
712 Consult Fin Compl Chklst	Indicates if the consultant final completion checklist (712) was received (yes, no, NA)
713 Close-out Folder Checklist	Indicates if the close-out folder checklist (713) was received (yes, no, NA)
PMF/CM Approval Date	Date the PMF/CM approved the submitted payment requisition
PMF/CM Approver Name	Name of the PMF/CM
	If this payment requisition is a CM contract, all required fields must be completed with the CM contact and approval information.
	If there is no CM on this job, all PMF/CM information must reflect the SDA contact and approval information.

SDA Received Date	Date SDA received the submitted payment requisition
Rejected by ProgOps	Date payment requisition was rejected by Program Operations
CPU Comments	Comment field for CPU and Program Operations notes
SIMS Use Only	
Sent to A/P (S)	Date payment requisition was electronically forwarded to Accounts Payable (populated from SIMS database)
Received by A/P (S)	Date Accounts Payable received the payment requisition (populated from SIMS database)
Reviewed by A/P (S)	Date Accounts Payable reviewed the payment requisition (populated from SIMS database)
Rejected by A/P (S)	Date Accounts Payable rejected the payment requisition (populated from SIMS database)
Approved by A/P (S)	Date Accounts Payable approved the payment requisition (populated from SIMS database)
SIMS Invoice Number (S)	Corresponding payment requisition number in SIMS (populated from SIMS database)
Req Rejected in SIMS (S)	Checkbox to indicate that the requisition is rejected in SIMS (populated from SIMS database)
A/P Waiting for Documentation (S)	Checkbox to indicate that Accounts Payable is waiting for documentation (populated from SIMS database)
SIMS Pay Req Notes (S)	Text field summarizing Accounts Payable's actions on the requisition (populated from SIMS database)
SIMS Pay Req Rejection Count (S)	Cumulative total of the number of times the requisition was rejected (populated from SIMS database)
Payment Month (S)	Month in which the requisition was paid (populated from SIMS database). This is used for reporting purposes.
Payment Year (S)	Year in which the requisition was paid (populated from SIMS database). This is used for reporting purposes.
Issues	
Issue Title and Code	Name and associated code for any issue linked to this payment requisition
Attachments	
Attachment	Name(s) of the attached file(s) linked to this payment requisition
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Drawing Sets	
Name	Description of the type of drawing set (for example: 1/2 Size Architect, Full Size Eng)
Title	Complete title of the drawing set, including phase
Date	Date of the hardcopy drawing submission set
Latest Bid Package	Not currently used
Status	
Ball in Court	Will be set to 'Drawing Library' when the drawing set is being stored; will be changed to a contact name when that contact removes the drawing set from the library
Priority	Will always be Normal
Phase	Phase of the drawing set (Approved for Construction, Issued for Bid, Issued for Construction, As-Built, Schematic Documents, Design Development, Progress Documents, Final Documents)
Progress	Percent progress on the status of the drawing set
Drawings in This Set	
This section is not currently used	
Distributed To	
This section is not currently used	
Schedule	
This section is not currently used	
SDA Data	
Location	Cabinet/cubby hole location where the drawing set can be found within the SDA, or, if the drawing set is archived, the archive box number
Comments	Any applicable comments about the drawing set
Issues	
This section is not currently used	
Attachments	
This section is not currently used	

Name	Descriptions
Drawings	
Number	Number of the drawing
Title	Title of the drawing
Designer	Name of the Architect who created the drawing
Issued Date	Date the drawing was issued
Spec Section	Construction Specification Index section linked to this drawing
Latest Bid Package	Not currently used
Latest Revision Number	Latest revision number for the drawing. Automatically populated from the Revisions section of the drawing
Latest Revision Date	Latest revision date for the drawing. Automatically populated from the Revisions section of the drawing
Status	
Ball in Court	Contact currently responsible for this drawing
Priority	Priority level of the drawing (High, Normal or Low)
Phase	Phase of the drawing (Approved for Construction, Issued for Bid, Issued for Construction, As-Built, Schematic Documents, Design Development, Progress Documents, Final Documents)
Progress	Percent progress on the design of the drawing
Revisions	
Revision Number	Revision number of the drawing (ORIG for the first revision, revision numbers for all subsequent revisions)
Revision Date	Date of revision
Title	Title of the revision
Received Date	Date SDA received the drawing revision
Distributed To	Company drawing revision was sent to
Distributed To Contact	Name of contact receiving the revision
Sent Date	Date drawing revision was sent
Transmittal	Number of the transmittal that was generated for this drawing revision
Copies	Number of revision copies that were sent
Paper Size	Paper size of drawing revision
Set	Title of drawing set this revision belongs to
Tracking Number	Tracking number for shipping from the transmittal linked to this revision
Issue Title and Code	Name and associated code for any issue linked to this revision
Attachment	Name(s) of the attached file(s) linked to this revision
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached

Attached By	Name of the user who attached the file(s)
Sets Containing This Drawing	
Set Title	Title of associated drawing set
Revision Number in Set	Drawing revision number in the associated drawing set
Revision Date in Set	Date of drawing revision in the associated drawing set
Set Date	Creation date of associated drawing set
Set Phase	Phase of the associated drawing set (Approved for Construction, Issued for Bid, Issued for Construction, As-Built, Schematic Documents, Design Development, Progress Documents, Final Documents)
Set Progress	Percent progress on the status of the associated drawing set
Details	
Discipline	Discipline to which this drawing applies (Architecture, Civil, Electrical, Fire Protection, HVAC, Landscape, Lighting, Mechanical, Plumbing, Power, Structural, Utilities)
Area	Area in the building being reviewed for this drawing (defined at the project level)
File Number	Not currently used
Contract	Contract this drawing is associated with
SDA Data	
Drawing Sketch	Checkbox to indicate if this is a drawing sketch
Drawing Specification	Checkbox to indicate if this is a drawing specification
Issues	
Issue Title and Code	Name and associated code for any issue linked to this drawing
Attachments	
Attachment	Name(s) of the attached file(s) linked to this drawing
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Submittal Package	
Package	Unique identification code for the submittal package. This field is only editable when adding a new package.
Title	Description of the submittal package. Title should reflect overall summary of all individual submittals in this package.
Contract	Contract number this submittal package is linked to (if applicable)
Status	
Ball in Court	Contact currently responsible for the submittal package
Priority	Priority level of the submittal package (High, Normal or Low)
Status	Status of the submittal package
Required Start	Contract Manager automatically calculates this date based on the earliest Required Start date entered on all submittals in the package. The Required Start date defines when action on this package should be started.
Required Finish	Contract Manager automatically calculates this date based on the latest Required Finish date entered on all submittals in the package. The Required Finish date defines when action on this package should be completed.
Total Items	Total number of submittals in this package. Contract Manager automatically calculates this field.
Submitted	Total number of submitted items in this package. Contract Manager automatically calculates this field.
Approved	Total number of approved items in this package. Contract Manager automatically calculates this field.
Unapproved	Total number of unapproved items in this package. Contract Manager automatically calculates this field.
% Complete	Total percentage of complete items in this package. Contract Manager automatically calculates this field.
Workflow Template	
Received From	Name of contact from whom you will receive the submittal package
Name (Submittal Coordinator)	Name of contact set as the Submittal Coordinator. This name is set at the project level.
Sent To	Name of contact you will send the submittal package to
Returned By	Name of contact who will return the submittal package to you
Forwarded To	Name of contact you will forward the submittal package to
Submittals	
Submittals	Unique title that identifies each submittal

Date Received	Date submittal was received for review
Date Sent	Date submittal was sent for review
Date Returned	Date submittal was returned from reviewing
Status	Status of the current review cycle
Date Forwarded	Date submittal was forwarded to another reviewer
Ball in Court	Name of company currently responsible for the submittal
BIC Contact	Name of the person currently responsible for the submittal
Received From	Name of company submittal was received from. This is part of the review cycle.
Received From Contact	Name of person submittal was received from. This is part of the review cycle.
Sent To	Name of company submittal was sent to. This is part of the review cycle.
Sent To Contact	Name of person submittal was sent to. This is part of the review cycle.
Returned By	Name of company who returned the submittal. This is part of the review cycle.
Returned By Contact	Name of person who returned the submittal. This is part of the review cycle.
Forwarded To	Name of company the submittal was forwarded to. This is part of the review cycle.
Forwarded To Contact	Name of person the submittal was forwarded to. This is part of the review cycle.
Latest Rev No	Number of the latest review cycle
Held	Number of days the Ball in Court contact has held the submittal. Contract Manager automatically calculates this value.
Elapsed	Number of days the submittal has been open. Contract Manager automatically calculates this value.
Overdue	Difference between the latest date and the required finish date. Contract Manager automatically calculates this value.
Required Start	Date action on this submittal should start
Required Finish	Date action on this submittal should be completed
Drawing	Not currently used
Contract No.	Contract number this submittal is linked to
Priority	Priority level of the submittal package (High, Normal or Low)
Schedule	
Activity ID	If a schedule is linked to this project, associated P6 schedule activity linked to this submittal package
Start	Start date of the activity
Finish	End date of the activity
Time Change (days)	Indicates the number of days the submittal package changes affect the project schedule

SDA Data	
Description	Description of the submittal package
Issues	
Issue Title and Code	Name and associated code for any issue linked to this submittal package
Attachments	
Attachment	Name(s) of the attached file(s) linked to this submittal package
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Submittals	
Package	Package number this submittal is linked to
Submittal	Unique identification code for this submittal
Title	Description of the submittal
Number	Unique number for this submittal
Category	Category of submittal. Options include: Product Data, Shop Drawing, Mock Up, Sample, Certification, As-Built, Close-Out, Warranty, Test Report, Operation/Maintenance Manual, MSDS-Material Safety Data Sheet and Leed.
Type	Type of submittal. Options include: Construction, Post-Construction and Pre-Construction.
Required Start	Date review of submittal should begin
Required Finish	Date review of submittal should be completed
Latest Review Cycle	Number of latest review cycle listed in the Review Cycles section
Held	Number of days the Ball in Court contact has held the submittal. Contract Manager automatically calculates this value.
Elapsed	Number of days the submittal has been open. Contract Manager automatically calculates this value.
Overdue	Difference between the latest date and the required finish date. Contract Manager automatically calculates this value.
Status	
Ball in Court	Contact currently responsible for the submittal
Priority	Priority level of the submittal (High, Normal or Low)
Status	Status of the submittal
Workflow Template	
Received From	Name of contact from whom you will receive the submittal
Name (Submittal Coordinator)	Name of contact set as the Submittal Coordinator. This name is set at the project level.
Sent To	Name of contact you will send the submittal to
Returned By	Name of contact who will return the submittal to you
Forwarded To	Name of contact you will forward the submittal to
Review Cycles	
Review Cycle	Contract Manager automatically assigns the next available number to identify the review cycle
Description	Description of the review cycle, such as "Initial Review"
Received	Date submittal was received for review
Sent	Date submittal was sent to the reviewer
Returned	Date submittal was returned from the reviewer

Status	Status of the returned submittal
Forwarded	Date submittal was forwarded back to the original contact
Sepias	Number of sepia reproducibles sent
Prints	Number of prints sent
Drawing Date	Date of latest drawing
Held	Difference between the current system date and the last status date. Contract Manager automatically calculates this value.
Elapsed	Difference between the current system date and the first status date. Contract Manager automatically calculates this value.
Remarks	Additional comments about the review cycle
Distributed To	Name of additional contact submittal should be sent to
Date	Date submittal was sent to additional contact
Copies	Number of copies sent to additional contact
Remarks	Additional comments about the review cycle
Transmit	Indicates if an entry for this document has been created in the Transmittal queue
Issue Title and Code	Name and associated code for any issue linked to this review cycle
Attachment	Name(s) of the attached file(s) linked to this review cycle
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)
Schedule ***(If a schedule is linked, the P6 activities will be populated)***	
Description	If a schedule is linked to this project, value will be populated
Lead Time	If a schedule is linked to this project, value will be populated
Activity ID	If a schedule is linked to this project, value will be populated
Start	If a schedule is linked to this project, value will be populated
Finish	If a schedule is linked to this project, value will be populated
Details	
Items in Submittal	Number of items attached to this submittal
Source	Name of contact who produced the submittal items
Filed by	Name of contact who filed the submittal
Filed Date	Date submittal was filed
Drawing	Drawing number associated with this submittal
Code	Unique document code that will allow users to identify this submittal (optional)
Approved By	Name of contacts who approved the submittal and the approval date(s)
Contract	Associated contract linked to this submittal

Issues	
Issue Title and Code	Name and associated code for any issue linked to this submittal
Attachments	
Attachment	Name(s) of the attached file(s) linked to this submittal
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name of the user who attached the file(s)

Name	Descriptions
Daily Construction Reports	
Reporting Party	Name and company of the person creating the report
Date	Date of the report. Defaults to the current date, but can be changed.
Day	Contract Manager automatically enters the day of the week that corresponds to the information entered in the Date field
Report Number	Contract Manager automatically assigns the next sequential number to a new report
Report Period	Time period of the report (Daily, Weekly, Monthly, etc.)
Contract	Contract this daily construction report is associated with
Change Management Number	Title of the associated master change management record (if initiated from this daily construction report)
Status	
Priority	Priority level of the daily construction report (High, Normal or Low)
Ball in Court	Contact currently responsible for the daily construction report
Approved?	"No" indicates the daily construction report is in process of review; "Yes" indicates that the review of the daily construction report is completed and the report is approved.
Approved By	Name and company of the person who approved the daily construction report, and the date of approval
Work Activity	
Work Activity	Remarks, descriptions of progress, milestones, delays or new conditions that may affect the project
Additional Comments	
Additional Comments	Additional information that may affect the project
Equipment	
Source	Company supplying the equipment
Description	Description of the equipment
Units	Number of units (pieces) of equipment being used
Equipment Type	Not currently used
Work Area	Area where the equipment is being used
Idle	Checkbox to indicate if this equipment was idle for the day
Rented	Checkbox to indicate if this is equipment was rented. If this is checked, it will activate the Acquired and Due Back fields.
Acquired	If this field is active, date the equipment rental began
Due Back	If this field is active, date the equipment is due to be returned
Remarks	Additional notes about the equipment

Issue Title and Code	Name and associated code for any issue linked to this equipment item
Attachment	Name(s) of the attached file(s) linked to this equipment item
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)
Field Force	
Source	GC that supplied the labor
Category	Category of the labor by profession
Work Area	Area where the labor is performed
Total Supervisors	Number of supervisors employed for this job
Total Supervisor Hours	Total number of hours worked by the supervisors
Total Foreman	Number of foremen employed for this job
Total Foreman Hours	Total number of hours worked by the foremen
Total Journeymen	Number of journeymen employed for this job
Total Journeymen Hours	Total number of hours worked by the journeymen
Total Apprentices	Number of apprentices employed for this job
Total Apprentice Hours	Total number of hours worked by the apprentices
Change Number	If applicable, change document associated with this daily construction report
Remarks	Additional information about the daily field force
Total Laborer Hours	Total number of hours worked by the laborers
Total Laborers	Number of laborers employed for this job
Issue Title and Code	Name and associated code for any issue linked to this field force record
Attachment	Name(s) of the attached file(s) linked to this field force record
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)
Visitors	
Time	Time the visitor arrived
Company	Company the visitor represents
Name	Name of the visitor
Remarks	Additional information about the nature of the visit
Issue Title and Code	Name and associated code for any issue linked to this visitor record
Attachment	Name(s) of the attached file(s) linked to this visitor record

Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)
Materials	
Delivery Time	Time the delivery was received
Material Name	Not currently using Materials module (the source of this data)
Quantity	Amount, weight or number of units delivered
Area	Area in which the materials are being used
Location	Location where the materials were delivered
Ticket number	Identifying number from the delivery receipt
Description	Description of the materials
Contract	Not currently using Materials module (the source of this data)
Remarks	Additional information about the material delivery
Issue Title and Code	Name and associated code for any issue linked to this material delivery
Attachment	Name(s) of the attached file(s) linked to this material delivery
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)
Schedule (*Data fields applicable if project is linked to a P6 schedule*)	
Worked On	Checkbox to indicate that the activity has been worked on
Activity ID	Associated P6 schedule activity linked to this daily report
Title	Name of the activity
Start	Start date of the activity
Finish	End date of the activity
% Complete	Percentage of the activity that is complete
Original Duration	Original time duration (in hours) for the activity
Remaining Duration	Remaining time duration (in hours) for the activity
Total Float	Total float time for the activity
Free Float	Free float time for the activity
Issue Title and Code	Name and associated code for any issue linked to this schedule
Attachment	Name(s) of the attached file(s) linked to this schedule
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)

Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)
Weather	
Length of suitable conditions	Amount of time weather conditions were acceptable for the day
Time (Period 1/2/3)	Time of day for the period
Temperature (Period 1/2/3)	Temperature range for the period
Precipitation (Period 1/2/3)	Type of precipitation for the period
Duration (Period 1/2/3)	Length of time for the period
Sky (Period 1/2/3)	Condition of the sky for the period
Wind (Period 1/2/3)	Wind speed for the period
Impact (Period 1/2/3)	Type of weather for the period if it impacted production
SDA Data	
Humidity % (Period 1/2/3)	Percentage of humidity conditions for the period
Issues	
Issue Title and Code	Name and associated code for any issue linked to this daily construction report
Attachments	
Attachment	Name(s) of the attached file(s) linked to this daily construction report
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Insurance	
Insured	Will always be NJSDA
Policy Type	Type of insurance policy (Automobile, Bid Bond, Errors and Omissions, General Liability, Other, Performance Bond, Professional Liability, Umbrella and Workers Compensation)
Policy No.	Insurance policy number
Insurance Carrier	Name of insurance company carrier
Contact Person	Name of contact for the insurance carrier
Effective Date	Effective date of insurance policy
Expiration Date	Expiration date of insurance policy
Policy Limit	Maximum insured limit for this policy
Status	
Ball in Court	Contact currently responsible for the insurance policy
Priority	Priority level of the insurance policy (High, Normal or Low)
Status	Status of the insurance policy
Details	
Contract	Contract number associated with this insurance policy
Remarks	Any applicable comments about the insurance policy
SDA Data	
Body of Letter	Standard information about the insurance policy
Cancellation Date	Date the insurance policy was cancelled
Reinstatement Date	Date the insurance policy was reinstated
Policy Limits	Checkbox to indicate if policy limits are incorrect
Expiration Date	Checkbox to indicate if policy expiration dates are incorrect
Additional Insured Language	Checkbox to indicate if additional insured language is required
Policy Expiration Alerts	Checkbox to indicate if policy alerts are needed
Cancellation Alerts	Checkbox to indicate if cancellation alerts are needed
SIR Deductibles ($)	Amount of deductible of the self insured retention
Broker Information	Name of the broker
Issues	
Issue Title and Code	Name and associated code for any issue linked to this insurance policy
Attachments	
Attachment	Name(s) of the attached file(s) linked to this insurance policy
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)

Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Punch List	
Punch List	Numeric identifier for the punch list. Number must be unique for each punch list.
Title	Descriptive title for the punch list
To	Set to name of GC if this is a final punch list, blank for all other punch list types
From	Name of user entering the punch list
Status	
Ball in Court	Contact currently responsible for the punch list
Priority	Priority level of the punch list (High, Normal or Low)
Punch List Items	
Item No.	Sequential number assigned by Contract Manager
Opened	Date punch list item was started/opened
Required	Date action on this punch list item is required
Closed	Date punch list item was ended/closed
Ball in Court	Contact currently responsible for the punch list item
Priority	Priority level of the punch list item (High, Normal or Low)
Status	Current status of the punch list item
Area	Area in the building being reviewed for punch list item (defined at the project level)
Room	Room in the area being reviewed for punch list item (defined at the project level)
Elevation	Elevation of the area being reviewed for punch list item (defined at the project level)
Location	Location of the area in the building being reviewed for punch list item, such as the location within the room
Description	Detailed description of the punch list item
Activity ID	Associated P6 schedule activity linked to this punch list item (only applicable if a schedule is linked to this project)
Start	Start date of the activity (only applicable if a schedule is linked to this project)
Finish	End date of the activity (only applicable if a schedule is linked to this project)
Responsible Item	Used to cross-reference (link) one punch list item to another
Value ($)	Value of the punch list item
CSI	Applicable Construction Specification Index (CSI) item code for this punch list item
Source	Source of the punch list item (Architect, DCA, District, PMF, Post-Occupancy)
Type	Type of punch list item (Final to GC, Post-Occupancy, Preliminary)

Issue Title and Code	Name and associated code for any issue linked to this punch list item
Attachment	Name(s) of the attached file(s) linked to this punch list item
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)
Details	
Description	Detailed description of the nature of the punch list
Contract	Contract number associated with this punch list
Change Management Number	If Change Management is initiated from this document, the Change Management document number will automatically display in this field. This field is not editable.
SDA Data	
Punch List Type	Identifies the type of punch list (Final to GC, Post Occupancy, Preliminary)
Issues	
Issue Title and Code	Name and associated code for any issue linked to this punch list document
Attachments	
Attachment	Name(s) of the attached file(s) linked to this punch list document
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Change Management	
Number	Unique system generated number for this document. This number should not be changed.
Dated	Date the change management process started
Title	Description of the change management document. Entry format should be contract number, Change Order number or Authority Agent Recommendation number or Amendment number.
Phase *(section cannot be edited)*	
Budgeted Row	Not currently used
Committed Row	Cost as entered for each phase of the change management process in the Commitments section
Estimated Cost	Estimated cost of the change (Contract Change Request / Authority)
Quoted Cost	Quoted cost of the change (Contractor Proposal)
Negotiated Cost	Negotiated cost of the change (Authority Agent Recommendation)
Final Cost	Final cost of the change (Change Order)
Projected Cost	Value for the latest commitment phase
Status	
Ball in Court	Field should always be blank or display "To Be Determined"
Priority	Priority level of the change management record (High, Normal or Low)
Status	Field should always be left at the default value of "New Item"
Budget and Budget Contract Summary	
Contract	Contract linked to this change management document and the contract budget summary (Original Contract Sum, Previously Approved Changes, Revised Contract Sum, Current Change Value, Contract Sum if Approved at this Value)
Commitments	
Total Included Commitments	Total value of all commitments for this change management document
Include	When checked, Contract Manager places the values for this commitment line in the Project Cost Report
Contract/PO	Contract number this change is linked to
Estimated (CCRA) - Cost	Estimated cost of the CCRA
Estimated (CCRA) - Time	Value of Time Change (days) field entered on the CCRA
Estimated (CCRA) - Date	Date entered on the CCRA
Quoted (CP) - Cost	Contractor's quoted cost of the CP
Quoted (CP) - Time	Value of Time Change (days) field entered on the CP
Quoted (CP) - Date	Date entered on the CP

Negotiated (AAR) - Cost	Latest negotiated value of the AAR
Negotiated (AAR) - Time	Value of Time Change (days) field entered on the AAR
Negotiated (AAR) - Date	Date entered on the AAR
Final (CO) - Cost	Final cost of the CO
Final (CO) - Time	Value of Time Change (days) field entered on the CO
Final (CO) - Date	Date entered on the CO
Projected Cost	Value for the latest commitment phase (CCRA, CP, AAR, CO)
Collected into Change Number	Not currently used
Remarks	
Remarks	Detailed description for the required change
Documents by Phase ***(Displays all documents that make up the current change management process. This section is not editable)***	
(Commitments) Display Open Included Commitments	Not currently used
(Commitments) Title	Title of change documents created within this change management document
(Commitments) Required Date	Date action is required for the change documents within this change management document
(Commitments) Current Status	Current status of the change documents within this change management document
(Commitments) Include	Include this document in the commitments section of the change management document
(Commitments) Cost	Value of the change documents within this change management document
(Budget) Title	Not current used
(Budget) Required Date	Not current used
(Budget) Current Status	Not current used
(Budget) Include	Not current used
(Budget) Cost	Not current used
Details	
Reason for Change	Reason code related to this change (Owner-Initiated Change, Diff Site Conditions, Delay-Claims Only, Design Consultant E/O (COs), GC Error (Amendments))
Scope	Scope of the change (In Scope or Out of Scope)
Referenced Document	Separate document within this project that can be linked to this change management record (such as an Issue)
Activity ID	P6 project schedule activity ID related to the early/actual start and finish dates
SDA Data	

Architect/Engineer Estimate ($)	Value of the change quoted by the Architect/Engineer firm
Architect/Engineer Comments	Related comments from the Architect/Engineer firm
PMF/CM Estimate ($)	Value of the change quoted by the PMF/CM firm
PMF/CM Comments	Related comments from the PMF/CM firm
PM Estimate ($)	Value of the change quoted by the SDA project team member
PM Comments	Related comments from the SDA project team member
Justification	Justification for the change
CCD Justification	If this change is a Construction Change Directive, justification for the change
DCD Justfication	If this change is a Design Change Directive, justification for the change
For CMD Use Only	
Change Order Type	Type of CMD Change Order (A/E Amendment, A/E DCD, CCD, CM Amendment, Construction Change Order)
Date CMD Received	Date CMD received the Change Order
CMD Reviewer	Name of the CMD reviewer
Date 1st Add't Info Request Sent	First date request was made for additional information
Date Received 1	Date additional information was received
Additional Documents Required 2	Second date request was made for additional information
Date Received 2	Date additional information was received
Additional Documents Required 3	Third date request was made for additional information
Date Received 3	Date additional information was received
Date All Add't Info Requests Recvd	Final date all additional information was received
CMD Comments	Comments about the change entered by CMD
Contract Verification	Specific section of the Architect/Engineer contract that applies to this change
Time Extension Requested	Number of calendar days requested for a time extension
Time Extension Approved	Number of calendar days approved for a time extension
Proposed Amount ($)	Original amount of the change request
Initial Assessment Value ($)	Initial value set by CMD prior to negotiations
CCD Value ($)	Approved value of the Construction Change Directive
RCO/Revised CO Value ($)	Approved value of the Resolving Change Order
CMD Amount Released ($)	Actual amount released after evaluation / negotiations
Variance ($)	Difference between the proposed amount and the released amount
Change Review Status	Current status of the change document (Additional Info Requested, Canceled, In Review, Rejected, Released, Rescinded, Returned)
CMD CO/RCO Ruling Date	Date change document was released
CMD Recommended Time Ext	CMD's recommendation of time extension
CMD Concurrence	Date CMD agreed to release
Brief Description	Short description of the change for CMD reporting purposes
Issues	

Issue Title and Code	Name and associated code for any issue linked to this change management document
Attachments	
Attachment	Name(s) of the attached file linked to this change management document(s)
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions
Change Order	
Type	Will always default to "Change Order"
Contract	Contract number this change order is linked to. This field is only editable when adding a new change order.
To	Recipient of this change order
From	Person creating the change order
Number	Document number for this change order. This field is only editable when adding a new change order and should be the same as the hard copy change order document.
Title	Description of the change order. The title will reflect the same title as the Change Management document. Entry format should be contract number, Change Order number or Authority Agent Recommendation number or Amendment number.
Date	Date of the change order
Total Cost	Total cost for the change order. Contract Manager automatically enters the amount based on the information entered in the Line Items section.
Time Change (days)	Indicates the number of days the change order affects the project schedule. Contract Manager automatically enters the days based on the information entered in the Schedule section.
Review Status	
Do not check or this document will need to be deleted	Checkbox must be left unchecked
Document Owner	Not currently used
Ball in Court	Contact currently responsible for the change order
Priority	The priority level of the change order (High, Normal or Low)
Status	Status of the change order
Approved?	"No" indicates the change order is in process of review; "Yes" indicates that the review of the change order is completed and approved.
Approved By	Names of the SDA staff who approved the change order, and the dates of approval.
Summary	
Original Contract/PO Sum	Amount of the original contract linked to this change order. Contract Manager automatically enters the value in this field when the contract is selected in the top section of the document.
Net Amount of Previous Changes	Total value of the previously approved change orders. Contract Manager automatically enters the value in this field, but it can be recalculated by clicking the "Update Totals" button in this section.

Contract/PO Sum Prior to This Change	Value of the Original Contract Sum plus the Net Amount of Previous Changes. Contract Manager automatically enters the value in this field, but it can be recalculated by clicking the "Update Totals" button in this section.
Current Change Value	Total value for all items entered in the Line Items section. Contract Manager automatically enters the value in this field and it is recalculated when a line item is added, edited or deleted.
Current Contract/PO Sum	Value of the Contract Sum Prior to this Change plus Current Change Value. Contract Manager automatically enters the value in this field, but it can be recalculated by clicking the "Update Totals" button in this section. It is also automatically recalculated when a line item is added, edited or deleted.
Include Pending Changes	Checkbox should always be left unchecked
Contract/POs Completion Date Prior to this Change	Not currently used
Contract/POs Completion Date Including this Change	Not currently used
Markup for Changes	
Section is not currently used	
Line Items	
Type	Default should always display "Lump Sum"
Line Item No.	Contract Manager automatically assigns the next sequential number to each row
Description	Description of the line item or service being provided
Lump Amount ($)	Total dollar value of the line item
Tax Rate	Not currently used
Sales Tax ($)	Not currently used
Line Item Total ($)	Contract Manager automatically lists the total value based on the amount entered in the Lump Amount($) field
Material Name	Not currently used
Material Title	Not currently used
Activity ID	Not currently used
Cost Code	Cost element this line item is costed to
Title	Title of the Cost Code
Distributed	Dollar value associated with the Cost Code
Details	
Description	Description of the change order
Spec Section	Applicable Construction Specification Index section to link to this change order
Cost Category	Cost category for the change order, which is from the contract associated with this change
Cost Type	Type of change order (pending or approved)

Required Date	Contract Manager automatically enters seven days from the current date, however, this can be manually changed if necessary
Acknowledged Date	Date the response is received from the recipient of the change order
Previous Change Management Phase	Contract Manager automatically lists the previous phase of Change Management. If this is the only phase of Change Management so far, this field will be blank.
Change Management Number	Number of the Change Management record this change order was generated from
Collected into Change Number	Not currently used
Reason for Change Order	Drop down list for the reason code related to this change order (Owner-Initiated Change, Diff Site Conditions, Delay-Claims Only, Design Consultant E/O (COs), GC Error (Amendments)
Initiator Log Number	Not currently used
Respondent Log Number	Not currently used
Schedule	
Activity ID	Associated P6 Project Management schedule activity linked to this change order (if a schedule is linked to this project)
Start	Start date of the activity
Finish	End date of the activity
Time Change (days)	Number of days the change order affects the project schedule. The number entered here will automatically populated in the Time Change (days) field in the top section of the change order.
SDA Data	
Change Order Type	Type of change order. Options include Additional Assignment, CCD-Authorization, CCD-ValueTBD, Change in Scope, Change Order, Resolving CO, Settlement and Task Order.
Related to Claim/Settlement	Checkbox to indicate if this change order is related to a claim or settlement (check indicates "yes")
Originated as CCD	Checkbox to indicate if this change order originated as a CCD (check indicates "yes")
PMF/CM Approval Date	Date to indicate the date the PMF/CM approved the change order
Approver Comments	Field for the PMF/CM to enter any comments relating to the approval of this change order
SIMS Change Order Number (S)	Corresponding change order number assigned in the SIMS database. This field is automatically populated through an interface.
CO Originated in SIMS (S)	Checkbox to indicate if this change order was originally created in the SIMS database. This field is automatically populated through an interface.
SIMS CO Notes (S)	Notes entered against this change order in the SIMS database. This field is automatically populated through an interface.

CO Rejected in SIMS (S)	Checkbox to indicate if this change order was rejected in the SIMS database. This field is automatically populated through an interface.
SIMS CO Rejection Count (S)	Number of times this change order has been rejected. This field is automatically populated through an interface.
Sent to A/P (S)	Date the change order was sent to Accounts Payable. This field is automatically populated through an interface.
Received by A/P (S)	Date the change order was received by Accounts Payable. This field is automatically populated through an interface.
Reviewed by A/P (S)	Date the change order was reviewed by Accounts Payable. This field is automatically populated through an interface.
A/P Analyst Reviewer (S)	Name of the person in Accounts Payable who reviewed the change order. This field is automatically populated through an interface.
A/P Review Notes (S)	Notes entered against this change order by the Accounts Payable reviewer in the SIMS database. This field is automatically populated through an interface.
Date Change Order is Executed (S)	Date the change order was executed for payment in the SIMS database. This field is automatically populated through an interface.
Execution Month (S)	Month of the execution date. This field is automatically populated through an interface. It is used for reporting purposes.
Execution Day (S)	Day of the execution date. This field is automatically populated through an interface. It is used for reporting purposes.
Execution Year (S)	Year of the execution date. This field is automatically populated through an interface. It is used for reporting purposes.
Issues	
Issue Title and Code	Name and associated code for any issue linked to this change order document
Attachments	
Attachment	Name(s) of the attached file(s) linked to this change order document
Subject	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)
Date Attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)

Name	Descriptions	
Contracts	**Budgeted**	**Committed**
To	Will always be To Be Determined	Name and company of the person receiving the contract
From	Will always be SDA	Name of SDA contact issuing the contract
Number	Number of the budget iteration	SDA contract number
Dated	Date budget document was created and approved	Date contract was awarded
Spec Section	Not currently used	Not currently used
Total Cost	Total amount for this budget	Original value for this contract
Review Status		
Do not check or this document will need to be deleted	Not currently used	Not currently used
Document Owner	Not currently used	Not currently used
Ball in Court	Set to “To Be Determined”	Not used for a contract
Priority	Will always be “Normal”	Will always be “Normal”
Status	Status of the budget	Will always be “Approved”
Approved?	"No" indicates the budget is in process of review; "Yes" indicates that the review of the budget is completed and approved.	Will always be approved ("Yes")
Approved By	Names of SDA approvers and dates of approval	Names and companies of the approval parties and dates of contract award
Contract Summary		
Original Contract/PO Sum	Original value of the budget	Original value of the contract
Approved Changes	Will always be zero	Total value of approved changes on the contract
Revised Contract Sum	Original value of the budget	Original value of the contract plus the total value of approved changes
Actual to Date	Will always be zero	Amount paid on the contract so far

Balance	Original value of the budget	Balance remaining on the contract
Changes		
Title	Will always be blank	Title of the change document associated with this contract
Type	Will always be blank	Type of change document
Change Management	Will always be blank	Change Management document title
Change Date	Will always be blank	Date the change document was created
Approved Date	Will always be blank	Date the change document was approved
Approved Changes	Will always be blank	Value of the approved change document(s)
Pending Changes	Will always be blank	Value of pending change document(s)
Status	Will always be blank	Status of the change document
Insurance		
Policy Type	Not currently used	Not currently used
Insurance Provider	Not currently used	Not currently used
Effective Date	Not currently used	Not currently used
Expiration Date	Not currently used	Not currently used
Policy Limit	Not currently used	Not currently used
Invoices (*will only appear if you have invoices against the contract*)		
Number	Will always be blank	Number of the invoice
Date	Will always be blank	Date invoice was created
Title	Will always be blank	Title of the invoice
Ball in Court	Will always be blank	Will always be “Sent to A/P”
Priority	Will always be blank	Will always be “Normal”
Status	Will always be blank	Will always be “Approved”
Amount Billed	Will always be blank	Amount billed on the invoice
Amount Paid	Will always be blank	Amount paid of the invoice
Payment Date	Will always be blank	Date the payment was made

Check Number	Will always be blank	Check number for the payment
Activity ID	Will always be blank	Not currently used
Received by A/P (S)	Will always be blank	Date Accounts Payable received the invoice (populated from SIMS database)
Reviewed by A/P (S)	Will always be blank	Date Accounts Payable reviewed the invoice (populated from SIMS database)
Approved by A/P (S)	Will always be blank	Date Accounts Payable approved the payment (populated from SIMS database)
Retainage This Period (S)	Will always be blank	Value of retainage for the current billing period (populated from SIMS database)
Retainage to Date (S)	Will always be blank	Cumulative value of total retainage (populated from SIMS database)
Payment Requisitions (*will only appear if you have payment requisitions against the contract*)		
Period To	Will always be blank	Period ending date of the requisition
Application Number	Will always be blank	Requisition number
Amount Certified	Will always be blank	Amount certified for the requisition
Completed and Stored to Date	Will always be blank	Value of the contract work completed to date
Current Payment Due	Will always be blank	Value of the amount certified for each billing period
Certified?	Will always be blank	Indicates whether the requisition has been certified (yes or no)
Latest	Will always be blank	Indicates whether this is the latest requisition for this contract (yes or no)
Submittals		
Title	Not applicable for budgets	Title of the submittal
Package	Not applicable for budgets	Submittal package this submittal belongs to
Latest Review Cycle	Not applicable for budgets	Number of the latest submittal review cycle

Status	Not applicable for budgets	Status of the most recent submittal review cycle
Ball in Court	Not applicable for budgets	Contact currently responsible for the submittal
Line Items		
Line Item Number	Unique number for each row	Unique number for each row
Quantity	Will be blank	Will be blank
Units of Measure	Will be blank	Will be blank
Description	Will be blank	Line item added by SIMS-CM interface
Unit Price	Will be blank	Will be blank
Net Amount	Total value of the budget	Total value of the line item
Tax Rate	Will always be zero	Will always be zero
Sales Tax	Will always be zero	Will always be zero
Line Item Total	Total value of the budget	Total value of the line item
Material	Will be blank	Will be blank
Activity ID	Will be blank	Will be blank
Procurement Item	Will be blank	Will be blank
Cost Code	Cost codes associated with budget	Cost code this line item is costed to
Details		
Description	Description of the budget	Will be blank
Document For	Type of budget (will always be FEC)	Type of contract
Manager	Name of SDA Budget Manager	Contact name for the company the contract was awarded to
Cost Category	Will always be Budget	Will always be Commitment
Cost Type	Will always be Original	Will always be Original
SBE/MBE/WBE	Not currently used	Not currently used
Created from Buyout Item	Not currently used	Not currently used
Reference Number	Not currently used	Not currently used
Work At	Not currently used	Not currently used
Bill To	Not currently used	Not currently used
Terms	Not currently used	Not currently used

Shipping	Not currently used	Not currently used
Schedule (*if P6 schedule is linked to this project*)		
Worked On	Will be blank	Will be blank
Activity ID	Will be blank	Will be blank
Title	Will be blank	Will be blank
Start	Will be blank	Will be blank
Finish	Will be blank	Will be blank
% Complete	Will be blank	Will be blank
Original Duration	Will be blank	Will be blank
Remaining Duration	Will be blank	Will be blank
Total Float	Will be blank	Will be blank
Free Float	Will be blank	Will be blank
Issues		
Issue Title and Code	Will be blank	Name and associated code for any issue linked to this contract
Attachments		
Attachment	Name(s) of the attached file(s) linked to this budget	Name(s) of the attached file(s) linked to this contract
Subject	Subject of the attached file(s)	Subject of the attached file(s)
Location	Location to which the file(s) was uploaded	Location to which the file(s) was uploaded
File Size	Size of the attached file(s)	Size of the attached file(s)
Date Attached	Date the file(s) was attached	Date the file(s) was attached
Attached By	Name(s) of the user who attached the file(s)	Name(s) of the user who attached the file(s)