

## STANDARD OPERATING PROCEDURE: Flowchart

<b>AREA:</b>	Construction	<b>BRANCH:</b>	Construction Programs
<b>FUNCTION/TASK:</b>	Closing Out Contracts	<b>EFFECTIVE DATE:</b>	07/11/2025
<b>CREATED BY:</b>	Aaron Cooper	<b>VERSION:</b>	1
		<b>REVISED DATE:</b>	

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### AUTHORIZATION

John Thomas- Transportation Manager

### PURPOSE

Closing Out Contracts in AAHSTOWare Project

### SUMMARY

Using AASHTOWare Project to close out a contract.

### PREREQUISITES

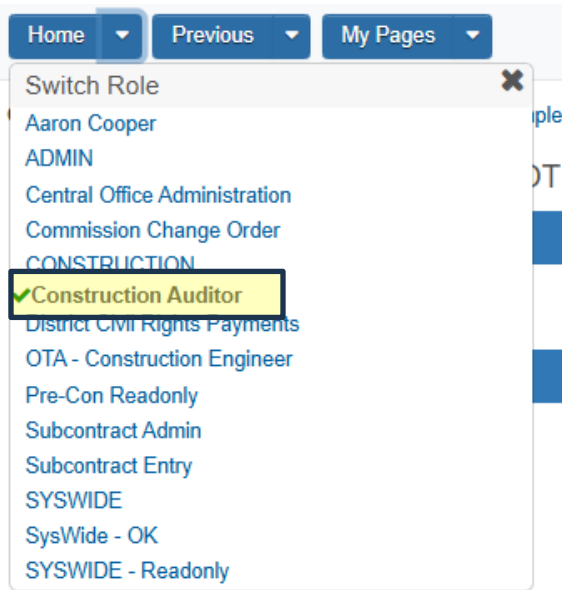
- **Tools, Supplies, Equipment:** Computer and Internet Connection

### INDEX

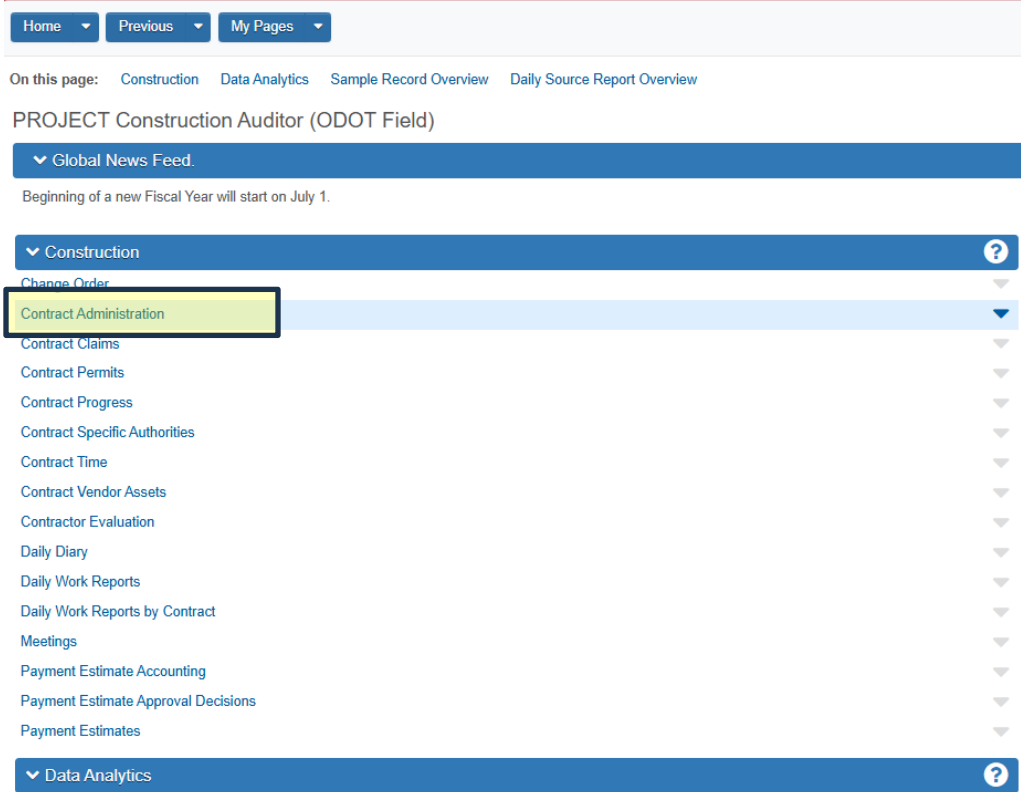
- **Part 1: Construction Auditor Role..... Page 1**
- **Part 2: District Auditor Role ..... Page 9**
- **Part 2A: How to Flag Line Item ..... Page 15**
- **Part 2B: How to Un Flag Line Item..... Page 16**
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- **Part 3: Set to Complete ..... Page 18**
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# Part 1: Construction Auditor Role

**Step 1:** Ensure you are in Construction Auditor role.



**Step 2:** Click **Contract Administration** from the **Construction** component.



Step 3: Search your needed **Contract ID**.

Home

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My Pages

Contract Administration Overview

Contract Administration Overview

250003

System Default

Showing 1 of 1

Contract	Description	Federal / State / OTA Project Number
250003	TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE	STPG-214E(168)AG

Step 4: Click the **Contract Number** hyperlink on the Row.

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Contract Administration Overview

Contract Administration Overview

250003

System Default

Showing 1 of 1

Contract	Description	Federal / State / OTA Project Number
250003	TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE	STPG-214E(168)AG

**Step 5: Click the *Contract Times* tab.**

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Administration OverviewApproved DBE CommitmentsContract DocumentationContract PaymentsContract ProgressCurrent Contract

Contract Administration Summary

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

GeneralAdditional InformationAdministrative OfficesContract AuthorityContract TimesDBE/Payroll/PaymentsSample and TestingFundingLocationsPermitsCommentsContract Price Adjustment Index

Contract ID

250003

Description\*

TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Prime Contractor Name

TRAFFIC SIGNALS, INC.

Contract Status

Active

Contract Type\*

ODOT - ODOT Contract

Spec Book

**Step 6: Search for the *RE-Audit-Begin-DT* under the **Informational** component.**

Informational

Res

Advanced

Showing 2 of 2

Select Informational Times...

0 changed

Time ID	Agcy Type	Del Allowed	Rec Source
RE-AUDIT-BEGIN-DT		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
Residency Audit Begin Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither
RE-AUDIT-END-DT		Yes	Construction
Residency Audit End Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither

**Step 7: On the *RE-AUDIT-BEGIN-DT*, enter the **Actl Compl** date. The **Actl Compl** date is, the audit begin date.**

Select Informational Times...

1 changed

Time ID	Agcy Type	Del Allowed	Rec Source
RE-AUDIT-BEGIN-DT		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
Residency Audit Begin Date	07/11/2025 10:28 AM	mm/dd/yyyy --:-- --	Neither

## Step 8: Click **Save**.

IC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE) Save ?

Time ID	Start Time	Time Type
00 AT		Available Time
Time Descr*	Main	Active % Compl
CONTRACT REQUIREMENTS	Yes	No

▼ Informational

Q Res Advanced Showing 2 of 2

Select Informational Times... 1 changed

Time ID	Agcy Type	Del Allowed	Rec Source
RE-AUDIT-BEGIN-DT		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For Comments
Residency Audit Begin Date	07/11/2025 10:28 AM	mm/dd/yyyy --:-- --	Neither
RE-AUDIT-END-DT		Yes	Construction
Residency Audit End Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither

▼ Recurring

## Step 9: Click the **Items** hyperlink.

Home Previous My Pages Actions Help Log off

Administration Overview Approved DBE Commitments Contract Documentation Contract Payments Contract Progress Current DBE Commitments SBP Commitments **Items** Projects Subcontracts

Contract Administration Summary

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE) Save ?

General

Additional Information

Administrative Offices

Contract Authority

Contract Times

DBE/Payroll/Payments

Sample and Testing

Funding

Locations

Permits

Comments

Contract Price Adjustment Index

▼ Site

Q Type search criteria or press Enter Advanced Showing 1 of 1

Select Site Times... 0 changed

Time ID	Start Time	Time Type
00 AT		Available Time
Time Descr*	Main	Active % Compl
CONTRACT REQUIREMENTS	Yes	No

▼ Informational

Q res Advanced Showing 2 of 2

## Step 10: Fine your needed **Line Item** and fill the **As Built** field with your **Audited Quantity**.

Contract Items

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Save

Contract Items

Contract Project Items

Contractor Items

Type search criteria or press Enter

Advanced

Showing 13 of 13

1 changed

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0
				District Auditor	Comments	

Bid Quantity: 1 / Current Quantity: 1 LS

Type search criteria or press Enter

Begin typing to search or pri

## Step 11: Click **Save**.

Contract Items

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Save

Contract Items

Contract Project Items

Contractor Items

Type search criteria or press Enter

Advanced

Showing 13 of 13

1 changed

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0
				District Auditor	Comments	

Bid Quantity: 1 / Current Quantity: 1 LS

Type search criteria or press Enter

Begin typing to search or pri

## Step 12: Click **Contract Project Items** tab.

Administration Overview

Approved DBE Commitments

Contract Administration

Contract Progress

Current DBE Commitments

Contract Payments

Projects

Subcontracts

Contract Items

Contract Project Items

Contractor Items

Save Complete

X

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Type search criteria or press Enter

Advanced

Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built	Appri
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0
				District Auditor	Comments	

Bid Quantity: 1 / Current Quantity: 1 LS

Type search criteria or press Enter

Begin typing to search or pri

Step 13: Here is the list of Pay Items to view each pay item and for checking your Quantities.

Contract Items

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items

Contract Project Items

Contractor Items

ContractItemLineNumber

Search

0005002000400060007000900110

001000300050006500800100

Item Description

Search

IPLREMOVAL OF TRAFFIC SIGNAL EQUIPMENT

250003

Contract

250003Contract ID

0005ProjectItemLineNumber

805(A)3256Item Code

(PL)REMOVAL OF TRAFFIC SI...Item Description

1.00Quantity

1.00CurrentQuantity

0.00QtyPostToDateAppDwrs

0.00QtyPostToDateAppDwrs

0.00QtyPostToDateAppDwrs

0.00QuantityPaidToDate

Pj Ln DwrDate Seq FirstName LastName From To Location

Quantity Posted

Pay Book

**Notes:** If you have any Audit Materials you want to Attach, click the Pay Item “Row Action Menu” and select “Attachments”.

Q

Type search criteria or press Enter

Advanced

Showing 2 of 2

Actions

Exclude from Search Results

Views

Attachments (0)

Links

Tracked Issues

Project - Description	Improvement Type	Project Item Count
3685504 - 0300 - TRAFFIC	F021 - Safety	12
3685504 - 640 - CONSTRUCTION	F021 - Safety	1

Step 14: Click the **Contract Administration** hyperlink.

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Administration OverviewApproved DBE CommitmentsContract AdministrationContract ProgressCurrent DBE CommitmentsContract PaymentsProjectsSubcontracts

Contract Items

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items

Contract Project Items

Contractor Items

ContractItemLineNumber

0005002000400060007000900110

001000300050006500800100

Item Description

IP(L)REMOVAL OF TRAFFIC SIGNAL EQUIPMENT

250003

Contract

Pj LnDwrDateSeqFirstNameLastNameFromToLocationQuantity Posted

250003Contract ID0005ProjectItemLineNumber805(A)3256Item Code(P)LREMOVAL OF TRAFFIC SI...Item Description1.00Quantity1.00CurrentQuantity0.00CityPostToDateAppDwrs0.00CityPostToDateAppDwrs0.00QuantityPaidToDate

Step 15: Find the **RE-AUDIT-END-DT** and enter the **Actl Compl** date to show when you (Residency) finished your audit.

Select Informational Times...2 changed

Time ID	Agcy Type	Del Allowed	Rec Source
RE-AUDIT-BEGIN-DT		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
Residency Audit Begin Date	07/11/2025 10:28 AM	mm/dd/yyyy --:-- --	Neither
RE-AUDIT-END-DT		Yes	Construction
Residency Audit End Date	07/11/2025 11:17 AM	mm/dd/yyyy --:-- --	Neither

Recurring

Step 16: Click **Save**.

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Administrative Offices

Contract Authority

Contract Times

DBE/Payroll/Payments

Sample and Testing

Funding

Locations

Permits

Comments

Contract Price Adjustment Index

Select Site Times...

Search failed

Informational

resAdvancedShowing 2 of 2

Select Informational Times...

0 changed

Time ID	Agcy Type	Del Allowed	Rec Source
RE-AUDIT-BEGIN-DT		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
Residency Audit Begin Date	07/11/2025 10:28 AM	mm/dd/yyyy --:-- --	Neither
RE-AUDIT-END-DT		Yes	Construction
Residency Audit End Date	07/11/2025 11:17 AM	mm/dd/yyyy --:-- --	Neither

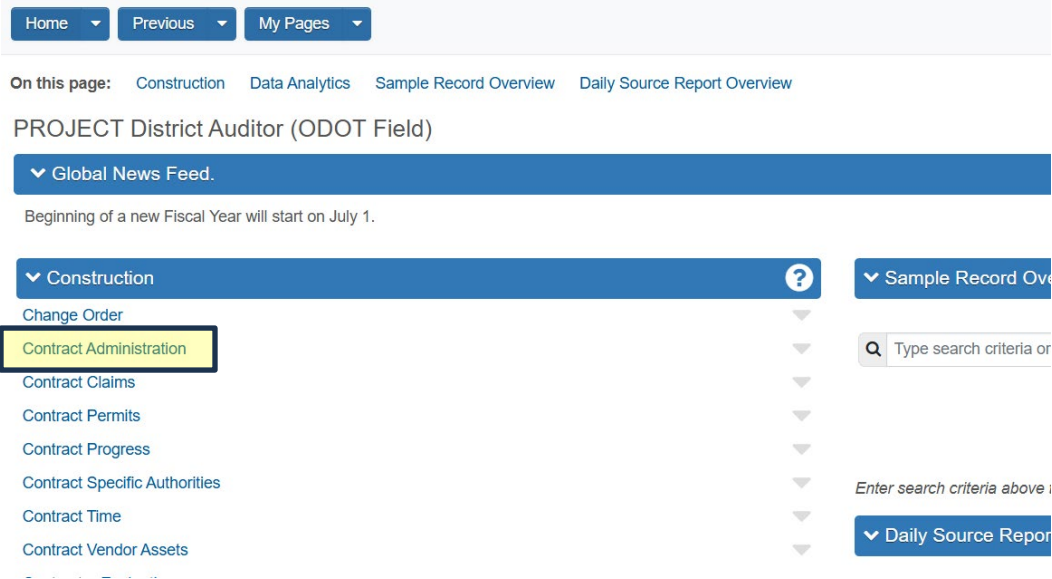
2 changed

# Part 2: District Auditor Role

Step 1: Ensure you are in the *District Auditor* role.



Step 2: Click *Contract Administration* under the **Construction** component.







### Step 3: Search the needed **Contract Number**.

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Contract Administration Overview

▼ Contract Administration Overview

 System Default Showing 1 of 1


Contract	Description	Federal / State / OTA Project Number	JPN	Orig Matl and AAs
250003	 TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE	 STPG-214E(168)AG	 36685504	02/07/2025 2:30:47




### Step 4: Click the **Contract Number** hyperlink.

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Contract Administration Overview

▼ Contract Administration Overview

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Contract	Description	Federal / State / OTA Project Number	JPN	Orig Matl and AAs
250003	 TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE	 STPG-214E(168)AG	 36685504	02/07/2025 2:30:47

### Step 5: Click **Contract Times** tab.

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Contract Administration Summary


▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

[General](#)  
[Additional Information](#)  
[Administrative Offices](#)  
[Contract Authority](#)  
**[Contract Times](#)**  
[DBE/Payroll/Payments](#)  
[Sample and Testing](#)  
[Funding](#)  
[Locations](#)  
[Permits](#)  
[Comments](#)  
[Contract Price Adjustment Index](#)


**Contract ID**

250003

**Description\***



**Prime Contractor Name**

 TRAFFIC SIGNALS, INC.

**Contract Status**

Active

**Contract Type\***

ODOT - ODOT Contract

**Spec Book**

**Step 6:** Search for the **DISTRICT-AUDIT-BEGIN** under the **Informational** component.

Informational

Q Dis Advanced Showing 3 of 3

Select Informational Times...

0 changed

Time ID	Agcy Type	Del Allowed	Rec Source
DISTRICT-AUDIT-BEGIN		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
District Audit Begin Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither
DISTRICT-AUDIT-END		Yes	Construction
District Audit End Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither

**Step 7:** Fill out the **DISTRICT-AUDIT-BEGIN** date on the **DISTRICT-AUDIT-BEGIN** Row.

Informational

Q Dis Advanced Showing 3 of 3

Select Informational Times...

1 changed

Time ID	Agcy Type	Del Allowed	Rec Source
DISTRICT-AUDIT-BEGIN		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
District Audit Begin Date	07/11/2025 01:22 PM	mm/dd/yyyy --:-- --	Neither
DISTRICT-AUDIT-END		Yes	Construction
District Audit End Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither

**Step 8:** Click **Save**.

SIGNALS (RE) There are unsaved changes. Save ?

CONTRACT REQUIREMENTS Yes No

Informational

Q Dis Advanced Showing 3 of 3

Select Informational Times...

1 changed

Time ID	Agcy Type	Del Allowed	Rec Source
DISTRICT-AUDIT-BEGIN		Yes	Construction
Time Descr*	Actl Compl	Proj Compl	Req For
District Audit Begin Date	07/11/2025 01:22 PM	mm/dd/yyyy --:-- --	Neither
DISTRICT-AUDIT-END		Yes	Construction
District Audit End Date	mm/dd/yyyy --:-- --	mm/dd/yyyy --:-- --	Neither

## Step 9: Click **Items** hyperlink.

Home Previous My Pages Save Complete X Actions Help Log off

Administration Overview Approved DBE Commitments Contract Documentation Contract Payments Contract Progress Current DBE Commitments SBP Commitments **Items** Projects Subcontracts

### Contract Administration Summary

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE) Save ?

General Additional Information Administrative Offices Contract Authority Contract Times DBE/Payroll/Payments Sample and Testing Funding Locations Permits Comments Contract Price Adjustment Index

Site

Type search criteria or press Enter Advanced Showing 1 of 1

Select Site Times... 0 changed

Time ID	Start Time	Time Type
00 AT		Available Time
Time Descr *	Main	Active % Compl
CONTRACT REQUIREMENTS	Yes	No

Informational

Type search criteria or press Enter Advanced Showing 3 of 3

Select Informational Times... 0 changed

Time ID	Agcy Type	Del Allowed	Rec Source
DISTRICT-AUDIT-BEGIN		Yes	Construction
Time Descr *	Actl Compl	Proj Compl	Req For Comments

## Step 10: Click **Contract Project Items** tab.

Home Previous My Pages

Administration Overview Approved DBE Commitments Contract Administration Contract Progress Current DBE Commitments Contract Payments Project

### Contract Items

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items **Contract Project Items** Contractor Items

Type search criteria or press Enter Advanced Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1
				District Auditor	
Bid Quantity: 1 / Current Quantity: 1 LS				Begin typing to search or pr	

## Step 11: Check the Pay Items for **Quantities**.

Contract Items

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items

Contract Project Items

Contractor Items

ContractItemLineNumber

Search
0005
0020
0040
0060
0070
0090
0110
0010
0030
0050
0065
0080
0100

Item Description

Search

(PL)REMOVAL OF TRAFFIC SIGNAL EQUIPMENT

1WAY3SECADJ SIG HD S-12

250003

Contract

Pj Ln DwrDate Seq FirstName LastName From To Location Quantity Posted

250003  
Contract ID  
0005  
ProjectItemLineNumber  
805(A)3256  
Item Code  
(PL)REMOVAL OF TRAFFIC SI...  
Item Description  
1.00  
Quantity  
1.00  
CurrentQuantity  
0.00  
QtyPostToDateAppDvrs  
0.00  
QtyPostToDateAppDvrs  
0.00  
QtyPostToDateAppDvrs  
0.00  
QuantityPaidToDate

**Note: On the Contract Project Items tab District Auditors can view any attachments that have been provided.**

## Step 12: Click **Contract Items** tab.

Contract Items

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items

Contract Project Items

Contractor Items

ContractItemLineNumber

Search
0005
0020
0040
0060
0070
0090
0110
0010
0030
0050
0065
0080
0100

Item Description

Search

(PL)REMOVAL OF TRAFFIC SIGNAL EQUIPMENT

1WAY3SECADJ SIG HD S-12

250003

Contract

Pj Ln DwrDate Seq FirstName LastName From To Location Quantity Posted

250003  
Contract ID  
0005  
ProjectItemLineNumber  
805(A)3256  
Item Code  
(PL)REMOVAL OF TRAFFIC SI...  
Item Description  
1.00  
Quantity  
1.00  
CurrentQuantity  
0.00  
QtyPostToDateAppDvrs  
0.00  
QtyPostToDateAppDvrs  
0.00  
QtyPostToDateAppDvrs  
0.00  
QuantityPaidToDate

**Step 13:** On the **Line Item**, enter your **6 Digit Core ID** in the **District Auditor** field to sign your approval.

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE) Save ?

Contract Items

Contract Project Items

Contractor Items

Type search criteria or press Enter Advanced Showing 13 of 13

1 changed

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor

147311

Mandy L Lindsey

Comments

**Step 14:** In the **Comments** field, leave a necessary comment.

Contract Items

Contract Project Items

Contractor Items

Type search criteria or press Enter Advanced Showing 13 of 13

1 changed

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor

147311

Mandy L Lindsey

Comments

Approved

**Step 15:** Click **Save**.

Contract Items

Contract Project Items

Contractor Items

Type search criteria or press Enter Advanced Showing 13 of 13

1 changed

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor

147311

Mandy L Lindsey

Comments

Approved

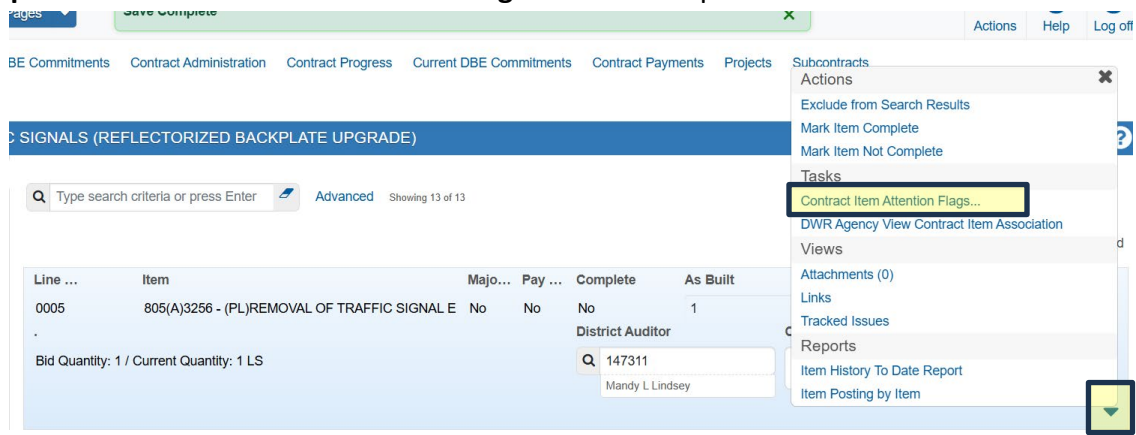
Save ?

Note: The next 2 sections (*Part 2A: How to Flag Line Item* and *Part 2B: How to Un Flag Item*) are optional steps that are only needed if desired. You may skip to **Step 16** if you don't need the *How to Flag and Un Flag* steps.

## Part 2A: How to Flag Line Item

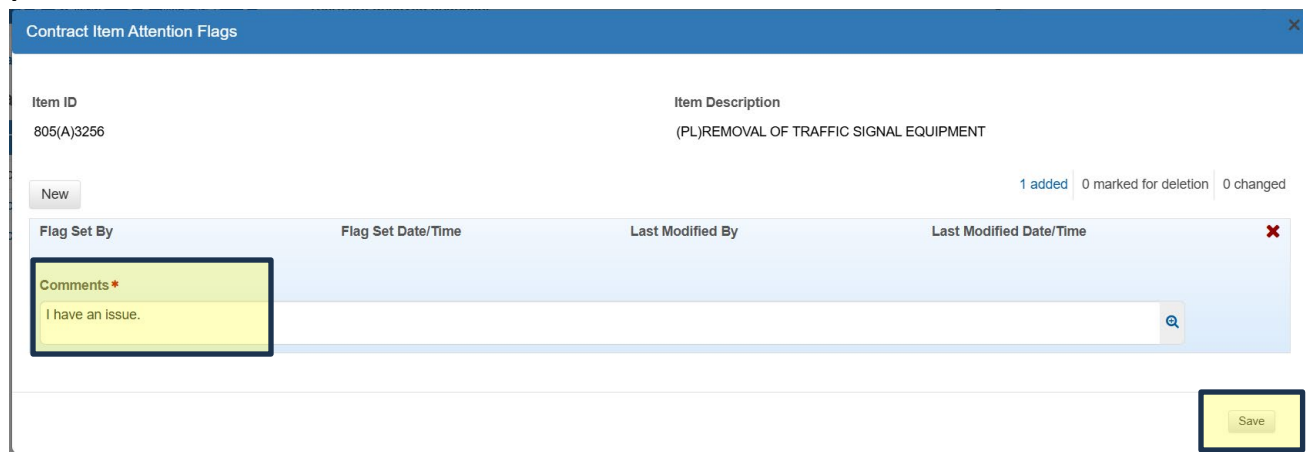
**Optional Step 1:** Click the **Row Action Menu**.

**Optional Step 2:** Click **Contract Item Attention Flags** from the drop-down menu.



**Optional Step 3:** Leave a Comment in the **Comments Box**.

**Optional Step 4:** Click **Save**.



Optional Step 5: Notice the Flag on the Line Item.

Contract Items

Save Complete

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items

Contract Project Items

Contractor Items

Q

Type search criteria or press Enter

Advanced

Showing 13 of 13

Line ...	Item	Majo...	Pa...
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No

Bid Quantity: 1 / Current Quantity: 1 LS

Part 2B: How to Un Flag Line Item

Optional Step 1: On the Line Item, click the Row Action Menu.

Optional Step 2: Click Contract Item Attention Flag.

Pages

Save Complete

Actions

Help

Log off

BE Commitments

Contract Administration

Contract Progress

Current DBE Commitments

Contract Payments

Projects

Subcontracts

Actions

Exclude from Search Results

Mark Item Complete

Mark Item Not Complete

Tasks

Contract Item Attention Flags...

DWR Agency View Contract Item Association

Views

Attachments (0)

Links

Tracked Issues

Reports

Item History To Date Report

Item Posting by Item

1

SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Q

Type search criteria or press Enter

Advanced

Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor

Q

147311

Mandy L Lindsey

Optional Step 3: Click the Row Action Menu.

Optional Step 4: Click Delete.

Contract Item Attention Flags

Item ID

805(A)3256

Item Description

(PL)REMOVAL OF TRAFFIC SIGNAL EQUIPMENT

New

0 added

0 marked for deletion

0 changed

Flag Set By	Flag Set Date/Time	Last Modified By	Last Modified Date/Time
ODOT258785	07/11/2025 1:47:52 PM	ODOT258785	0

Comments \*

I have an issue.

0 Actions

Delete

Duplicate Row

Insert Row

Views

Attachments (0)

Save

Optional Step 5: Click Save.

Contract Item Attention Flags

Item ID

805(A)3256

Item Description

(PL)REMOVAL OF TRAFFIC SIGNAL EQUIPMENT

New

0 added | 1 marked for deletion | 0 changed

Flag Set By	Flag Set Date/Time	Last Modified By	Last Modified Date/Time
ODOT\258785	07/11/2025 1:47:52 PM	ODOT\258785	07/11/2025 1:47:52 PM
<div>Comments</div> <div>I have an issue.</div>			

Save

Optional Step 6: Notice the Flag is now gone.

Contract Items

Save Complete

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items

Contract Project Items

Contractor Items

Type search criteria or press Enter

Advanced

Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approv
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0
				District Auditor	Comments	
Bid Quantity: 1 / Current Quantity: 1 LS				147311	Approved	
				Mandy L Lindsey		

Part 2: District Auditor Role (Continued)

Step 16: Make sure the As Built and Approved DWR Qty match.

0 changed

Item	Major Item	Pay Plan ...	Complete	As Built	Approved DWR Qty
512(A)3200 - PAINTING EXISTING STRUCTURES ()	Yes	No	Yes	1	1
District Auditor				Comments	
Current Quantity: 1 LS				147311	Accepted
				Mandy L Lindsey	

**Step 17:** Click the **Contract Administration** hyperlink.

Administration Overview Approved DBE Commitments **Contract Administration** Contract Progress Current DBE Commitments Contract Payments Projects

### Contract Items

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items  
Contract Project Items  
Contractor Items

Q Type search criteria or press Enter Advanced Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1

**Step 18:** Now that everything has been audited, enter the **Actl Compl** date on the **DISTRICT-AUDIT-END** row.

▼ Informational

Q dis Advanced Showing 3 of 3

Select Informational Times... 1 changed

DISTRICT-AUDIT-BEGIN

District Audit Begin Date 07/11/2025 01:22 PM mm/dd/yyyy --:-- -- Neither Construction

Time ID Agcy Type Del Allowed Rec Source

DISTRICT-AUDIT-END

Time Descr\* **Actl Compl** Proj Compl Yes Req For Construction

District Audit End Date 07/11/2025 02:13 PM mm/dd/yyyy --:-- -- Neither Comments

## Part 3: Set to Complete

*Note: Once you have approved everything, all Items need to be set to Complete. Follow the steps below.*

**Step 1:** Click the **Items** hyperlink.

Administration Overview Approved DBE Commitments Contract Documentation Contract Payments Contract Progress Current DBE Commitments SBP Commitments **Items** Projects Subcontracts

### Contract Administration Summary

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE) Save ?

General  
Additional Information  
Administrative Offices  
Contract Authority  
Contract Times  
DBE/Payroll/Payments  
Sample and Testing  
Funding  
Locations  
Permits

▼ Site

Q Type search criteria or press Enter Advanced Showing 1 of 1

Select Site Times... 0 changed

Time ID	Start Time	Time Type
00 AT		Available Time
Time Descr*	Main	Active
CONTRACT REQUIREMENTS	Yes	No
		% Compl

▼ Informational

**Step 2:** On the **Line Item** click the **Row Action Menu**.

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor  
 Q 147311  
 Mandy L Lindsey

Comments  
 Approved

**Step 3:** From the **Row Action Menu** drop-down menu, click **Mark Item Complete**.

[Commitments](#)
[Contract Administration](#)
[Contract Progress](#)
[Current DBE Commitments](#)
[Contract Payments](#)
[Projects](#)
[Subcontracts](#)

SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Q Type search criteria or press Enter
 Advanced
 Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	No	1	0

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor  
 Q 147311  
 Mandy L Lindsey

Comments  
 Approved

Actions
 

- Exclude from Search Results
- Mark Item Complete
- Mark Item Not Complete

 Tasks
 

- Contract Item Attention Flags...
- DWR Agency View Contract Item Association

 Views
 

- Attachments (0)
- Links
- Tracked Issues
- Reports
  - Item History To Date Report
  - Item Posting by Item

**Step 4:** Notice the **Line Items** are now marked **Complete**.

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approved DWR Qty
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	Yes	1	0

Bid Quantity: 1 / Current Quantity: 1 LS

District Auditor  
 Q 147311  
 Mandy L Lindsey

Comments  
 Approved

## Part 4: Final Quantity Change Order

**Step 1:** Click the **Contract Progress** hyperlink.

Home Previous My Pages

Administration Overview Approved DBE Commitments Contract Administration **Contract Progress** Current DBE Commitments Contract Payments Projects Subcontracts

Contract Items Save Complete X

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Contract Items Contract Project Items Contractor Items

Type search criteria or press Enter Advanced Showing 13 of 13

Line ...	Item	Majo...	Pay ...	Complete	As Built	Approv
0005	805(A)3256 - (PL)REMOVAL OF TRAFFIC SIGNAL E	No	No	Yes	1	0
				District Auditor	Comments	
Bid Quantity: 1 / Current Quantity: 1 LS				147311	Approved	
				Mandy L Lindsey		

**Step 2:** Click **Change Order** tab.

Contract Progress Summary

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

General Financials Daily Work Reports Diaries Sample and Testing Payment Estimates **Contractors** Change Orders Payment Adjustments Item Adjustments Agency Views Mix Designs

Contract ID  
250003

Description\*  
TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Prime Contractor Name  
TRAFFIC SIGNALS, INC.

Contract Status  
Active

Contract Type\*  
ODOT - ODOT Contract

Spec Book  
10

**Step 3:** Click the **Add** button.

Progress Overview Construction Stockpile Contract Administration Contract Documentation Items Projects Subcontracts

Contract Progress Summary

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

General Financials Daily Work Reports Diaries Sample and Testing Payment Estimates Contractors Change Orders Payment Adjustments Item Adjustments Agency Views Mix Designs

Net Change Amount Pending Net Change Percentage Pending

Net Change Amount Approved Net Change Percentage Approved

Total Net Change Amount Total Net Change Percentage

Type search criteria or press Enter Advanced

Add


Enter search criteria above to see results or Show first 10

**Step 4:** Click the **Change Order Type** field drop-down arrow.

TRAFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Change Order Date E  
07/11/2025 0


Description\* CI

Change Order Type\* A  
 

Author\* Er


**Step 5:** Select **0500 – Final Quantity** from the drop-down menu.

Change Order Type\*



- 0100 - Multi-Functional
- 0200 - Time Extension
- 0300 - Incentives
- 0400 - Zero Dollar
- 0500 - Final Quantity**
- 0600 - Substitutions
- 0700 - Supplemental Agreement


**Step 6:** Make sure the **Author** field populates your Information.

Change Order Type\*  
0500 - Final Quantity 


Author\* Q 258785  
Cooper Aaron

Reason\*

**Step 7:** Click the **Reason** field's drop-down arrow.

0500 - Final Quantity 

Author\* Q 258785  
Cooper Aaron

Reason\* 

Unilateral

**Step 8:** From the drop-down menu, select the needed reasoning.

Reason\*

100 - Site Requirement

200 - Scope Change

300 - Engineering Error / Omission

310 - Engineering Error

320 - Engineering Omission

**Step 9:** Click *Save*.

Summary

TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Change Order Date

07/11/2025

Description\*

Change Order Type\*

0500 - Final Quantity

Author\*

258785

Explanations

0

Change Order Revision Number

Approval Date

Entered By

Save

**Step 10:** Click the *Increase/Decrease Items*.

Contracts

Change Orders

Contract Administration

Contract Documentation

Contract Progress

Estimates

Items

Payment Estima

Contract Change Order Summary

Change Order - Test Successfully Saved

Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Change Order: 0001

Status: Draft

Amount:

Test

General

Increase/Decrease Items

New Items

Time Adjustments

Plan Discrepancies

Change Order Item Explanations

Review Tracking

Approval Tracking

Change Order Date

07/11/2025

Description\*

Test

Change Order Type\*

0500 - Final Quantity

Author\*

258785

Connor Aaron

Explan

0

Change

Approv

Enterec

258785

Enterec

**Step 11:** Click the **Balance Completed Items** button.

Contract Change Order Summary Change Order - Test Successfully Saved

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)

Change Order: 0001      Status: Draft      Amount:      Test

General

Increase/Decrease Items

New Items

Time Adjustments

Plan Discrepancies

Change Order Item Explanations

Review Tracking

Approval Tracking

▼ Increase/Decrease Items

Q | Type search criteria or press Enter Advanced

Select Items...

No rows found matching criteria.

▼ Balance Completed Items

Q | Type search criteria or press Enter Advanced

Balance Completed Items...

No rows found matching criteria.

*Notes: All items marked complete will balance to the adjusted posted DWR Quantity on Approved DWRs.*

**Step 12:** All Change Order Items will need an **Explanation**.

*Note: You cannot use "This Item has been balanced" as your explanation.*

**Step 13:** Click the **General** tab.

Home Previous My Pages Save Complete

Contracts Change Orders Contract Administration Contract Documentation Contract F

Contract Change Order Summary

▼ Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE U

Change Order: 0001      Status: Draft      Amount: 935.00      Test

General

Increase/Decrease Items

New Items

Time Adjustments

Plan Discrepancies

Change Order Item Explanations

Review Tracking

Approval Tracking

▼ Increase/Decrease Items

Q | Type search criteria or press Enter Adv

Select Items...

Proj Ln #	Proj - Cat
0010	3685504 - 030
▼ Curr Qty	Curr Ext Amt
140.000	130,900.0000

**Step 14:** You will now send the **Final Change Order Quantity** through how your **District** instructs you to.

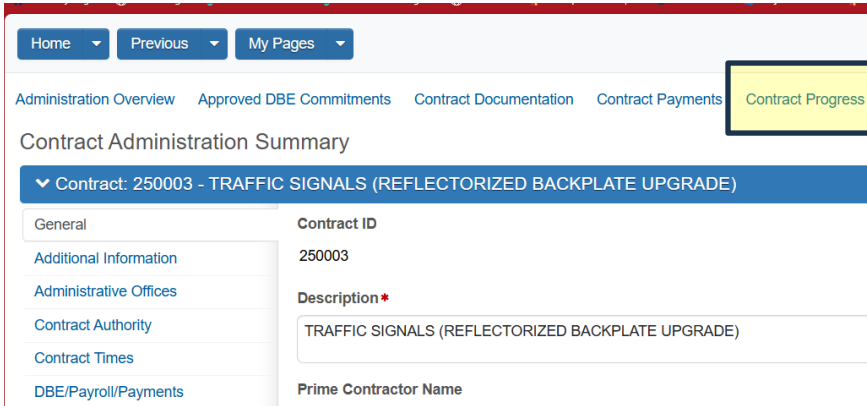
**Step 15:** Once you receive the **Approved Final Quantity Change Order** back, you will need to run a progressive to pay for all of the items.

*Note: There cannot be any items that will be paid on a final.*

*Note: Item Adjustments & Contract Adjustments can be paid on Finals.*

## Part 5: Final Estimate

**Step 1:** Click **Contract Progress** hyperlink.



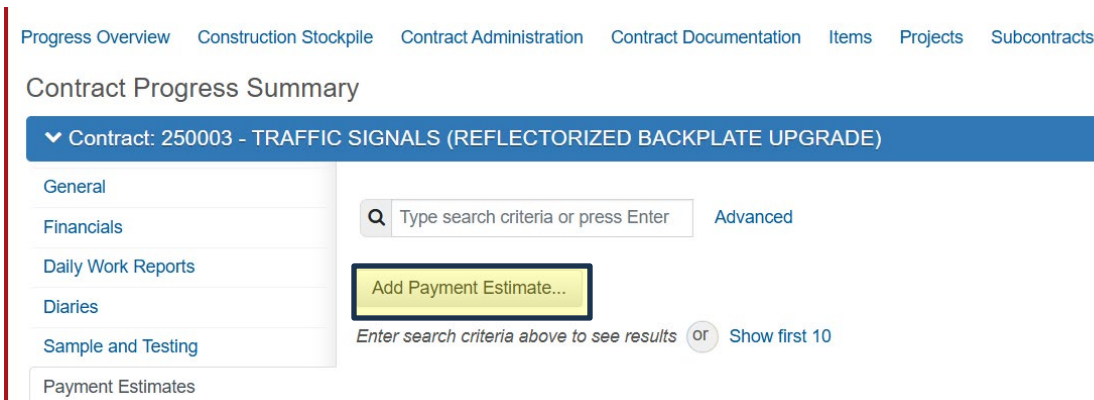
The screenshot shows the 'Contract Administration Summary' page. At the top, there are navigation tabs: 'Home', 'Previous', and 'My Pages'. Below these are links for 'Administration Overview', 'Approved DBE Commitments', 'Contract Documentation', 'Contract Payments', and 'Contract Progress'. The 'Contract Progress' link is highlighted with a yellow box. Below the navigation links is a blue bar with the text 'Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)'. On the left side, there is a sidebar with links: 'General', 'Additional Information', 'Administrative Offices', 'Contract Authority', 'Contract Times', and 'DBE/Payroll/Payments'. The main content area shows 'Contract ID' as 250003, 'Description' as 'TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)', and 'Prime Contractor Name' as an empty field.

**Step 2:** Click the **Payment Estimate** tab.



The screenshot shows the 'Contract Progress Summary' page. At the top, there are navigation tabs: 'Progress Overview', 'Construction Stockpile', 'Contract Administration', 'Contract Documentation', 'Items', 'Projects', and 'Subcontracts'. Below these is a blue bar with the text 'Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)'. On the left side, there is a sidebar with links: 'General', 'Financials', 'Daily Work Reports', 'Diaries', 'Sample and Testing', 'Payment Estimates', 'Contractors', 'Change Orders', 'Payment Adjustments', 'Item Adjustments', 'Agency Views', and 'Mix Designs'. The 'Payment Estimates' link is highlighted with a yellow box. The main content area shows 'Contract ID' as 250003, 'Description' as 'TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)', 'Prime Contractor Name' as 'TRAFFIC SIGNALS, INC.', 'Contract Status' as 'Active', 'Contract Type' as 'ODOT - ODOT Contract', and 'Spec Book' as an empty field.

**Step 3:** Click **Add Payment Estimate** button.



The screenshot shows the 'Contract Progress Summary' page. At the top, there are navigation tabs: 'Progress Overview', 'Construction Stockpile', 'Contract Administration', 'Contract Documentation', 'Items', 'Projects', and 'Subcontracts'. Below these is a blue bar with the text 'Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)'. On the left side, there is a sidebar with links: 'General', 'Financials', 'Daily Work Reports', 'Diaries', 'Sample and Testing', and 'Payment Estimates'. The 'Payment Estimates' link is highlighted with a yellow box. The main content area shows a search bar with the text 'Type search criteria or press Enter' and an 'Advanced' button. Below the search bar is a yellow button labeled 'Add Payment Estimate...'. At the bottom, there is a text input field with the text 'Enter search criteria above to see results' and a 'Show first 10' button.

## Step 4: Create the Final Pay Estimate

*Note: There cannot be any Exceptions on the Final Pay Estimate.*

*Note: Going through the Approval Process. The Contractor will receive an Adobe File requesting their signature on the Final Affidavit. Once signed by the Contractor, the Final Affidavit will be sent to the Residency Engineer (RE) for sealing. If the RE is not a PE, the RE can delegate to someone who is a PE.*

## Part 6: Final Packet Documentation

*Note: Once you have sent off the Final Estimate, start collecting the Final Packet Documentation.*

**Step 1:** Click the **Contract Documentation** hyperlink.

The screenshot shows a web application interface. At the top, there are three buttons: 'Home', 'Previous', and 'My Pages'. Below these is a navigation bar with links: 'Administration Overview', 'Approved DBE Commitments', 'Contract Documentation' (highlighted with a yellow box), and 'Contract Payments'. Underneath is the heading 'Contract Administration Summary'. A dropdown menu is open, showing 'Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)'. On the left, a sidebar lists options: 'General' (selected), 'Additional Information', 'Administrative Offices', 'Contract Authority', and 'Contract Times'. The main content area displays 'Contract ID' as 250003 and 'Description' as TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE).

**Step 2:** Click the **Document Submission** tab.

The screenshot shows the 'Contract Documentation Summary' page. At the top, there are three buttons: 'Home', 'Previous', and 'My Pages'. Below these is a navigation bar with links: 'Overview', 'Contract Administration', 'Contract Progress', 'Items', 'Projects', and 'Subcontracts'. Underneath is the heading 'Contract Documentation Summary'. A dropdown menu is open, showing 'Contract: 250003 - TRAFFIC SIGNALS (REFLECTORIZED BACKPLATE UPGRADE)'. On the left, a sidebar lists options: 'Contractor Evaluation', 'Document Submission' (highlighted with a yellow box), 'Review Document Submissions', 'Contract Project Design Evaluations', 'Plan Discrepancies', and 'Meetings'. The main content area features a search bar with the placeholder text 'Type search criteria or press Enter' and a search icon. Below the search bar, there is a table with two columns: 'Contractor' and 'Prime'. The table contains one row: '731127224 - TRAFFIC SIGNALS, II' and 'Yes'.

**Step 3:** Add the needed Documentation (Some will be added already and it all depends on what your project contains).

▼ Final Estimate Packet					0 changed
Type	Submitted Date ▼	Submitter ▼	+ ▼ Comments ▼	Document Additional Information ▼	
FP01 - Combined Final Packet	06/17/2025	Q Ann Wilson	<input type="checkbox"/>	<input type="text"/> Combined Packet	
FP10 - Acceptance Letter	06/17/2025	Q Charles Revelle	<input type="checkbox"/>	<input type="text"/> Acceptance Letter	
FP15 - Final Estimate Affidavit	06/17/2025	Q Charles Revelle	<input type="checkbox"/>	<input type="text"/> Final Estimate	
FP20 - Material Certification Letter	06/12/2025	Q Charles Revelle	<input type="checkbox"/>	<input type="text"/> Material Certification	
FP25 - Buy America Certified Letter	06/13/2025	Q Charles Revelle	<input type="checkbox"/>	Not Required By Contract <input type="text"/> Buy America	
FP30 - Bridge Foundation	06/13/2025	Q Charles Revelle	<input type="checkbox"/>	<input type="text"/> Bridge Foundation	
FP45 - Contractor Rating Form	05/27/2025	Q Charles Revelle	<input type="checkbox"/>	<input type="text"/> Contractor Rating	
FP50 - Other	06/13/2025	Q Charles Revelle	<input type="checkbox"/>	Waste Cert. of Disposal <input type="text"/> COD ATTACHED	

**Step 4:** On the **Acceptance Letter** row, click the **Checkbox** between the **Submitter** field and the **Comments** field. This will generate the **Final Acceptance** once saved.

FP01 - Combined Final Packet	06/17/2025	Q Ann Wilson	<input type="checkbox"/>	<input type="text"/> Combined Packet	▼
Type	Submitted Date ▼	Submitter ▼	+ ▼ Comments ▼	Document Additional Information ▼	▼
FP10 - Acceptance Letter	06/17/2025	Q Charles Revelle	<input checked="" type="checkbox"/>	<input type="text"/> Acceptance Letter	▼

**Step 5:** Click **Save**.

Contract: 230283 - BRIDGE PAINTING

▼ Final Estimate Packet

1 changed

FP01 - Combined Final Packet	06/17/2025	Q Ann Wilson	<input type="checkbox"/>	<input type="text"/> Combined Packet	▼
Type	Submitted Date ▼	Submitter ▼	+ ▼ Comments ▼	Document Additional Information ▼	▼

**Step 5:** Once you have clicked the checkbox and saved, an Adobe File Acceptance Letter will send to you for a Signature.

**Step 6:** Once you have signed the Acceptance letter, click the **Acceptance Letter Row Action Menu**.

FP10 - Acceptance Letter	06/17/2025	Q Charles Revelle	<input type="checkbox"/>	<input type="text"/> Acceptance Letter	
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**Step 7:** Click **Attachments** from the drop-down menu.

Type	Submitted Date	Submitter	Comments	Document Additional Information	
FP10 - Acceptance Letter	06/17/2025	Charles Revelle		Acceptance Letter	Actions
FP15 - Final Estimate Affidavit	06/17/2025	Charles Revelle		Final Estimate	There are no actions available.
FP20 - Material Certification Letter	06/12/2025	Charles Revelle		Material Certification	Tasks
FP25 - Buy America Certified Letter	06/13/2025	Charles Revelle	Not Required By Contract	Buy America	Compile Document Packet
FP30 - Bridge Foundation	06/13/2025	Charles Revelle		Bridge Foundation	Send Acceptance letter to Adobe Sign
FP45 - Contractor Rating Form	05/27/2025	Charles Revelle		Contractor Rating	Send Material Certification to Adobe Sign

**Step 8:** Click **Select File** button and upload your **Signed Acceptance Letter**.

Attachments Overview

▼ Attachments For Document Submission

Q Type search criteria or press Enter Advanced

Select File...

No rows found matching criteria.

▼ Adobe Sign Documents

Attachments Overview

▼ Attachments For Document Submission

Q Type search criteria or press Enter Advanced

Select File...

No rows found matching criteria.

▼ Adobe Sign Documents

Filename	Size (kb)	Description
Acceptance Letter.pdf	203	Acrobat Sign Completed

**Note:** Final Estimate Affidavit should be attached to the Final Estimate Affidavit row.

**Note:** Once you send off the Final Estimate, you should be able to do your Material Certification. Once you complete the Material Certification, it will send off to the RE and then from the RE to the PE

**Note:** Any additional documentation you need, you will load it to the appropriate areas.

**Step 9:** Once all needed documents are uploaded, it will combine to a **Final Packet** to be viewed by the **District Auditor, District Engineer, and the Auditor for Construction Division.**

**Note:** This will follow the same process that was used for SiteManager.

**Step 10:** The **Estimate** will process up and will be signed off by the **Director of Operations.**

**Step 11:** Once signed off, the **Final Packet** will send to **Comptrollers Office** and the project will be closed.