



QUICK REFERENCE GUIDE:

1.0 PSA – Advertising an RFP

Background:

The tentative advertising site publishes projects up to a year in advance. An ASPS is encouraged prior to advertising, but may not be required, depending on your regional PSA procedures.

Roles:

PSA User

Navigation:

Dashboard > Project Overview

1. Select the Project Overview **Component Actions Menu** and click **Add**.
2. Populate the **Project ID** with the PSA number, enter the **Federal Project Number** if applicable.
3. Enter the **Project Name**.
4. Toggle the **Item List** to *80 – PSA*.
5. Toggle the **Spec Book** to *PSA – Professional Services Agreement*.
6. Toggle **Project Type** to *13 – PSA*.
7. Enter the **Location** (if this is a term agreement and/or there will be various locations select VAR – Various).
8. **Select the Regions** tab and populate the **Region ID**, and check the **Primary** box for the primary region (this should be the region from which this project is going to be advertised). Repeat populating region IDs as many times as necessary (only selecting the Primary checkbox for one).
9. Click **Save**.
10. On the General tab modify or remove the auto populated **State Project Number** (if different from the PSA number).

11. Scroll down and enter the **PSA Manager, Procurement Officer** and **ASPS Date**. Check the **Term Agreement** and/or **Waiver** boxes if applicable (these boxes allow the ability to aggregate all Term Agreement and/or Waiver contracts in the future).
12. Enter the **Period of Performance** and **RFP Proposed Work** (this will populate to the RFP Tentative Advertising Website along with the PSA Manager once the Tentative Advertising Month, Year and Amount are populated, along with anything entered in the Tentative Advertise Additional Info).
13. Select the **Workflow** tab. Toggle the **Workflow** to **Professional Service Agreements** and toggle the **WorkflowPhase** to **Build Proposal**.
14. Click **Save**.
15. If you are ready to post this PSA information on the Tentative Advertising page, on the General Tab, populate the **Tentative Advertise Month, Tentative Advertise Year** and **TAS ONLY Engineer's Estimate Amount** (the website will publish the amount range, not the specific amount entered).
16. If there is additional information that should be published on the Tentative Advertising page enter it into the **Tentative Advertise Additional Info** field.
17. Click **Save**.

Next Steps:

Complete the rest of the Project Information. Use the QRG: *1.1 PSA – Populating Project Information*

If you need further assistance please contact your Module Admin
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