

Appia

Project Administration & Close- Out Instruction Manual ("Under Construction" Instructions)

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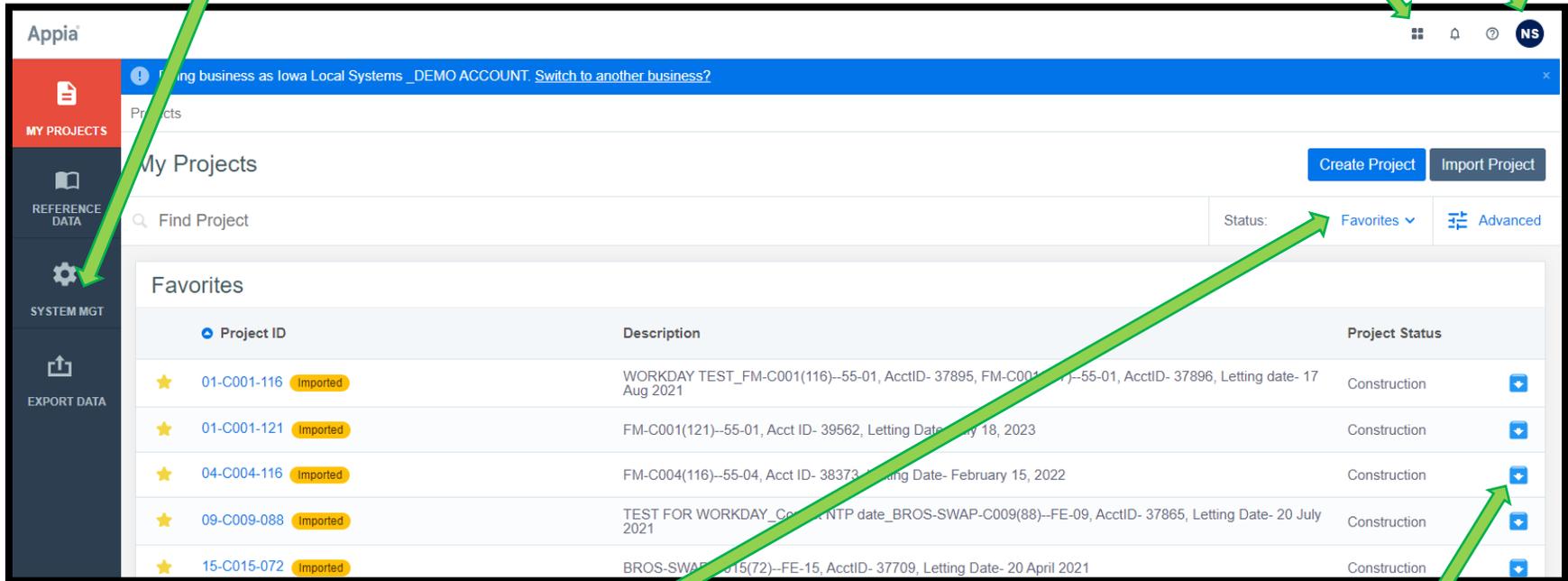
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1 - Basic Navigation

The circle with the initials is where you can navigate to the Account settings screen.

The menu bar on the left contains the main navigation tabs.

The four-square box is where you can navigate between Appia and Doc Express.



When a project is complete, use this button to archive it.

The Status area will show which types of projects you are actively viewing.

Use the pull-down menu to change between New, Under Construction, Completed, Archived, and Favorite projects.

2 - Accessing Your Project

A. Project Listing

To navigate to the desired project, select the project from the list on the main “Projects” screen.

The screenshot displays the 'My Projects' interface. The main content area is titled 'Under Construction' and contains a table of project entries. The table has two columns: 'Project ID' and 'Description'. The project '86-C086-060 - 31961' is highlighted with a green circle. The interface also features a sidebar on the left with navigation icons and buttons at the top right for 'Create Project' and 'Import Project'. A status filter is set to 'Under Construction'.

Project ID	Description
03-C003-062 <small>Imported</small>	03-C003-062
08-C008-079 <small>Imported</small>	BROS-SWAP-C008(79)--SE-08 - 36477 Letting Date: January 22, 2020
11-C011-071 <small>Imported</small>	STP-S-C011(71)--5E-11 - 29427 - USING TO TEST BALANCING CHANGE ORDER AT CLOSE-OUT
15-C015-065 <small>Imported</small>	BRS-SWAP-C015(65)--FF-15, Acct ID: 36986, Letting Date: July 21, 2020
21-2912-601 <small>Imported</small>	BRS-SWAP-2912(601)--FF-21, Acct ID-37099
25-C025-118 <small>Imported</small>	FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020
36-C036-074 JSON TEST/FINANCE <small>Imported</small>	
39-C039-093_Cass and Guthrie <small>Imported</small>	BROSCHBP-C039(93)--GA-39, Acct ID-37106 and BROSCHBP-C015(71)--GA-15, Acct ID-37105
54-C054-117 <small>Imported</small>	BRS-CHBP-C054(117)--GB-54, Acct ID: 37045, BROSCHBP-C058(61)--GA-58, Acct ID: 37046, BROSCHBP-C092(109)--NC-92, Acct ID: 37047, Letting Date: August 18, 2020
54-C054-117 W <small>Imported</small>	Washington County BROSCHBP-C092(109)--NC-92 - 37047, Letting Date: August 18, 2020
86-C086-060 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck

B. Project Overview Page

Once you have clicked into a project from the main project listing screen, you will be taken to the selected project's "Overview" screen. There are a number of summary blocks and widgets on this screen which show the basic project information. Many of these widgets will update to show current statistics as the project progresses.

Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)

Projects / 75-C075-166

75-C075-166 Under Construction

STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022

Overview Edit

General Information

Project

Work Type
PCC PAVEMENT WIDENING / PCC RESURFACING

Location

Location
On K 49, from C38 N 1 miles to 231 ft. north of 200th St.; In the city of Le Mars, on K49 from 18th Street SE south to 774 ft. south of 200th St.

Management

Prime Contractor
GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.

Created By

Awarded Amount \$2,482,485.15

Authorized Amount \$2,482,485.15

Approved Changes \$0.00

Description

STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022

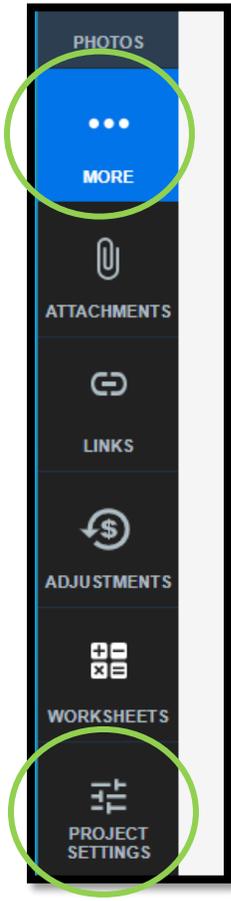
Amount Paid

Amount paid so far	0% of your Awarded \$2,482,485.15	0% of your Authorized \$2,482,485.15	0%
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3 - Integrating Appia with Doc Express for Submittals

If the Appia – Doc Express integration is enabled, payments and change orders can be sent directly from Appia to Doc Express, and Doc Express transition statuses are delivered back to Appia. The use of this integration functionality is required for the automated payment process, which applies to county projects on the Farm-to-Market system let on or after January 2024.

To enable the Doc Express integration, click into the desired project. Once in the project, click on the “More” left menu button. Then, click on “Project Settings” in the expanded menu.



In the Project Settings window, click on the "Integrations" tab near the top, center of the screen.

The screenshot shows the 'Project Settings' window for project '08-C008-089' (Under Construction). The 'INTEGRATIONS' tab is highlighted with a green circle. The settings include:

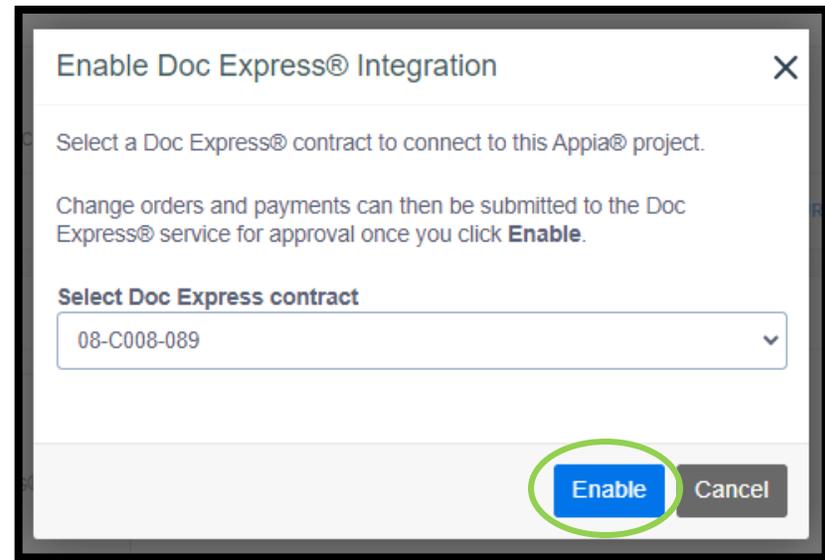
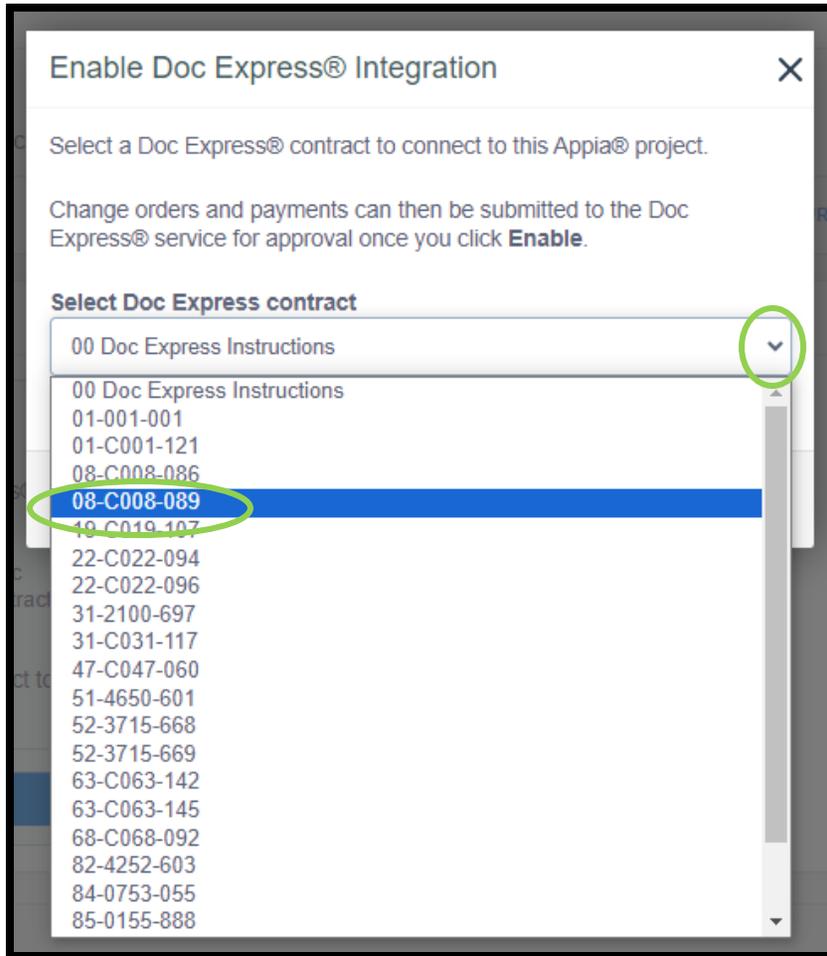
- Report Display Name:** A text input field with a placeholder. Below it, a note states: "Name to use in place of the agency name on PDF reports. If left blank, the agency name will be used."
- Report Logo:** A 'Choose File' button and the text 'No file chosen'. Below this is a preview of a logo with the text 'IOWA DOT'.
- Report Logo Preference:** Three radio button options:
 - Do not display a logo
 - Display the Appia product logo.
 - Display your organization's logo

The footer of the page includes the 'infotech' logo on the left and the following text on the right: "Copyright © 2023, Infotech®. All rights reserved. Appia® is a registered trademark of Infotech. Terms / Privacy / DMCA".

This will bring you to the Integrations screen. On the integrations screen, a Doc Express® Integration box will display. Click on the blue “Enable Integration” button at the bottom of the box.

The screenshot shows the 'Project Settings' page for project '08-C008-089' in an 'Under Construction' status. The 'INTEGRATIONS' tab is selected. A 'Doc Express® Integration' box is present, containing instructions to send payments and change orders to the service, and a note to ensure users have access to the appropriate contract and drawers. A blue 'Enable Integration' button is located at the bottom of this box and is circled in green. The infotech logo is visible at the bottom left of the page.

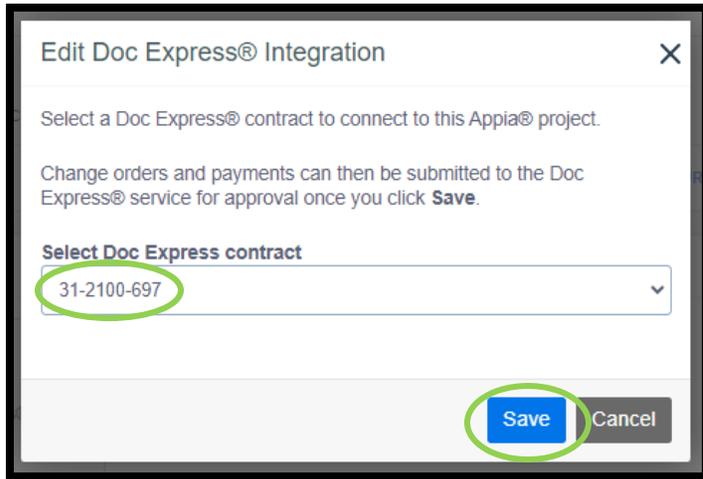
A pop-up box will appear called "Enable Doc Express® Integration. In the box is a pull-down menu under "Select Doc Express contract". In the pull-down menu, find and select the Doc Express contract that matches the contract ID of the Appia contract being connected. Once the appropriate contract has been selected and is displaying, click the blue "Enable" button in the lower, right corner of the pop-up box.



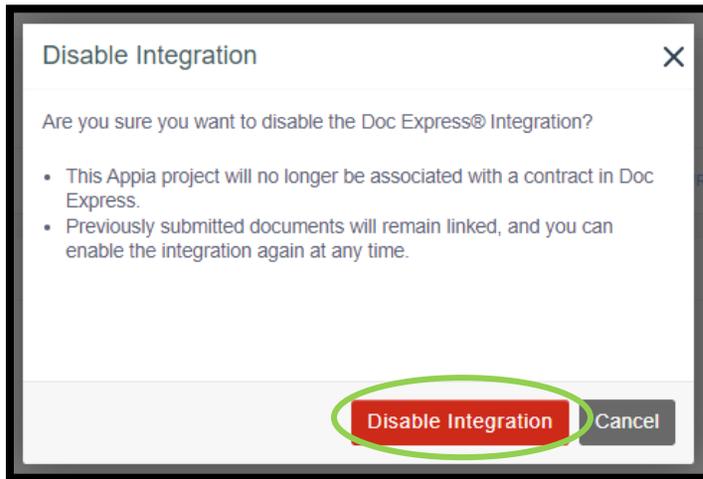
You will be returned to the Integrations screen. In the Doc Express Integration box, there will be a green circle with a check mark and the word "Enabled" next to the Doc Express® Integration box label. Verify that the selected contract ID matches the contract ID of your Appia project.

The screenshot shows a web interface for project settings. The breadcrumb trail at the top reads "Projects / 08-C008-089 / Settings". Below this, the contract ID "08-C008-089" is highlighted with a green circle, followed by a red "Under Construction" status tag. The project details below include "FM-C008(09)-55-08, Acct ID- 39638, Letting Date- March 12, 2023". A navigation bar contains tabs for "GENERAL", "CONSTRUCTION", "INTEGRATIONS" (which is selected), and "PROJECT SECURITY". The main content area is titled "Project Settings" and features a "Doc Express® Integration" section. This section includes a yellow "D" icon, the text "Doc Express® Integration", and a green circle containing a checkmark and the word "Enabled". Below this, there is explanatory text: "Send payments and change orders to the Doc Express® service for approval. Make sure that users submitting documents to the Doc Express® service have access to the appropriate contract and drawers." The "Doc Express Contract" is listed as "08-C008-089", which is also circled in green. At the bottom of the section are two buttons: "Change Contract" (blue) and "Disable Integration" (grey).

If you mistakenly chose the wrong contract, click on the blue “Change Contract” button. A pop-up window similar to the one previously described will appear. Select a different contract from the pull-down menu then click the blue “Save” button in the lower, right corner of the pop-up box.

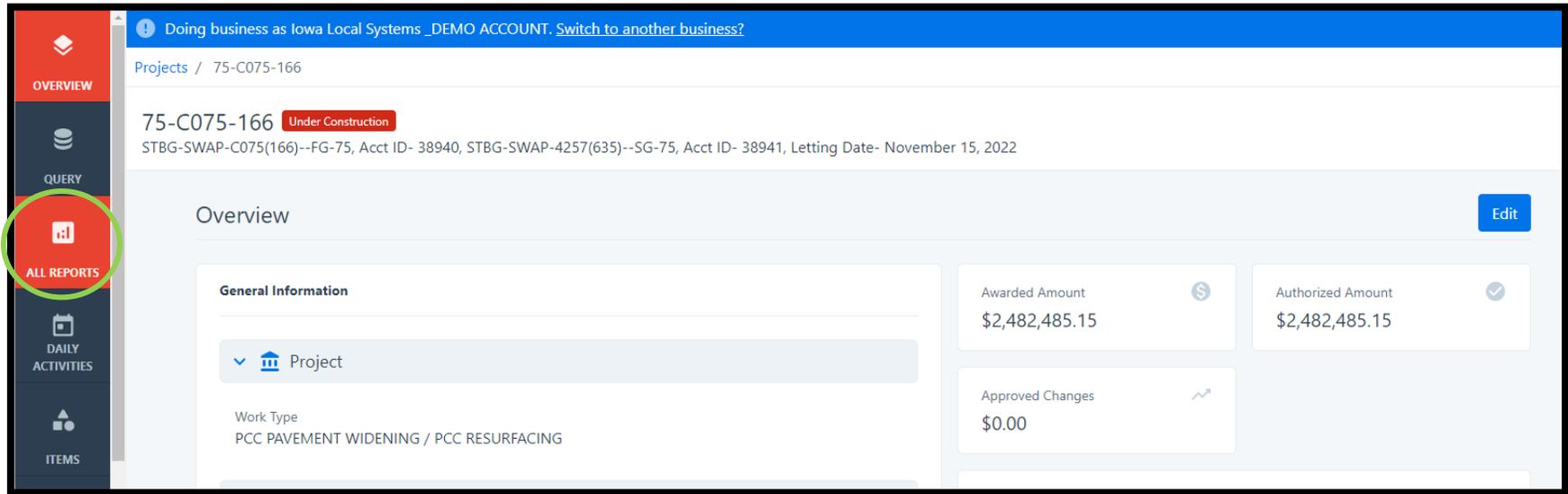


If you want to disable the Doc Express integration, click the gray “Disable Integration” button in the lower, right corner of the Doc Express® Integration box. A pop-up window will appear titled, “Disable Integration”. If you want to disconnect/disable the integration, click on the red “Disable Integration” button. If not, click the gray “Cancel” button.



4 - Reports

To access the standard reports, click on the “All Reports” button on the left menu.



The following screen will appear with a listing of the available reports. Reports available at this time are shown in the following list.

- Items by Contractor – Lists items assigned to each contractor.
- Item Material Associations – Displays all materials associated to each bid item in the project.
- Item Overruns – Lists all items with overruns. Locals are encouraged to use this report to review items that exceed \$50,000 overage and therefore require a change order according to [I.M. 6.000, Attachment D](#).
- Item Overruns by Fund Package – List all items associated with each fund package.
- Posted Quantity – Displays quantities posted in daily reports across a range of dates.
- Statement of Quantities – Displays all items with quantities placed in daily reports.
- Unpaid Items – Displays items in daily reports that have not yet been paid.
- Weekly Item Progress – Displays quantities posted in daily reports within 7 days after selected start date.
- Materials – Displays all materials that were added to the project.
- Payment History – Contains all the payments that have been posted to this project.
- Project Status – Displays an overview of the project information.
- Stockpile Status – Displays all stockpiles that were created for this project.
- Time Limits – Lists all of the working day time charges across a range of dates. **This is the equivalent report to Iowa DOT form 830238 “Weekly Report of Working Days”.** This Appia form is used in place of the Iowa DOT form 830238. Follow the directions given in the [“Time Limits”](#) section of this instruction manual to ensure all of the necessary information is included on the report.

Although confusing, not all of the reports are shown in this tab that Appia is capable of producing. For example, payment reports are generated from the Payments tab, and a summary of all item posting entries (quantity and measurement entries) and can be generated from the Items tab. Directions on generating specific useful reports not found in the “All Reports” tab are given in the section of the instructions associated with the type of report in question.

Projects / 75-C075-166 / Reports

75-C075-166 Under Construction
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

All Reports

Contractors

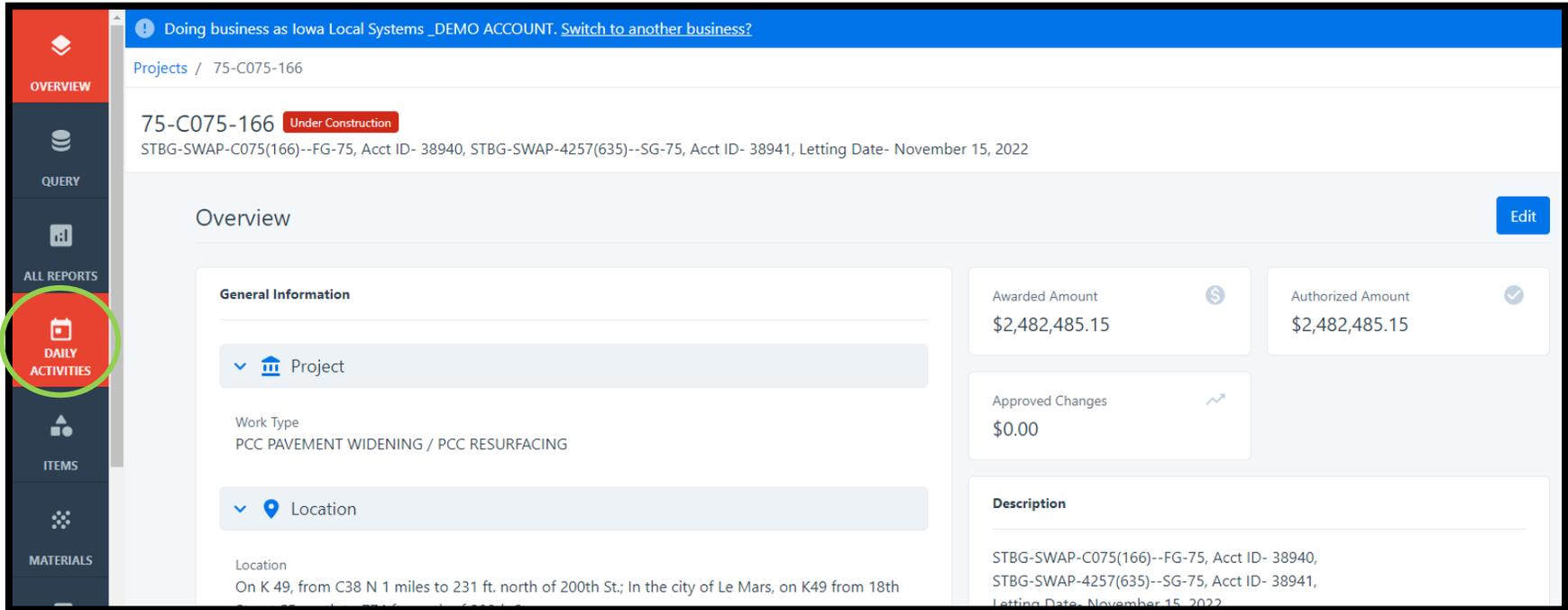
Items by Contractor
Lists all the items assigned to each contractor.

Items

- Item Material Associations**
Displays all materials associated to each item in the project.
- Item Overruns**
Lists all items with overruns.
- Item Overruns by Fund Package**
Lists all items with overruns by fund package.
- Items by Fund Package**
Lists all items associated with each fund package.
- Posted Quantity**
Displays quantities posted in daily reports across a range of dates.
- Statement of Quantities**
Displays all items with quantities placed in daily reports.

5 - Daily Reports and Postings

In Appia, the “Daily Activities” section is where you input the information traditionally entered into a “field book”. This section is where you write the “Daily Reports” concerning the project progress and post quantities completed for bid items each day. To access this section, click on the “Daily Activities” button on the left menu.



The screenshot displays the Appia software interface for a project. The top navigation bar is blue and contains the text "Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)". Below this, the breadcrumb "Projects / 75-C075-166" is visible. The main content area shows the project details for "75-C075-166" with a red "Under Construction" status tag. The project description includes "STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022". The "Overview" section is active, showing a "General Information" card with expandable sections for "Project" (Work Type: PCC PAVEMENT WIDENING / PCC RESURFACING) and "Location" (On K 49, from C38 N 1 miles to 231 ft. north of 200th St.; In the city of Le Mars, on K49 from 18th). To the right, there are summary cards for "Awarded Amount" (\$2,482,485.15), "Authorized Amount" (\$2,482,485.15), and "Approved Changes" (\$0.00). A "Description" card at the bottom right repeats the project details. The left sidebar contains navigation options: "OVERVIEW", "QUERY", "ALL REPORTS", "DAILY ACTIVITIES" (highlighted with a red circle), "ITEMS", and "MATERIALS". An "Edit" button is located in the top right corner of the overview section.

You will be brought to a screen showing a calendar. Click into the calendar to select the day for which you want to make an entry. If needed, you can use the blue arrows on each side of the month and year at the top of the calendar to navigate to a new month or year.

Doing business as Iowa Local Systems - DEMO ACCOUNT. [Switch to another business?](#)

Projects / 75-C075-166 / Daily Activities

75-C075-166 Under Construction [Search Daily Activities](#)

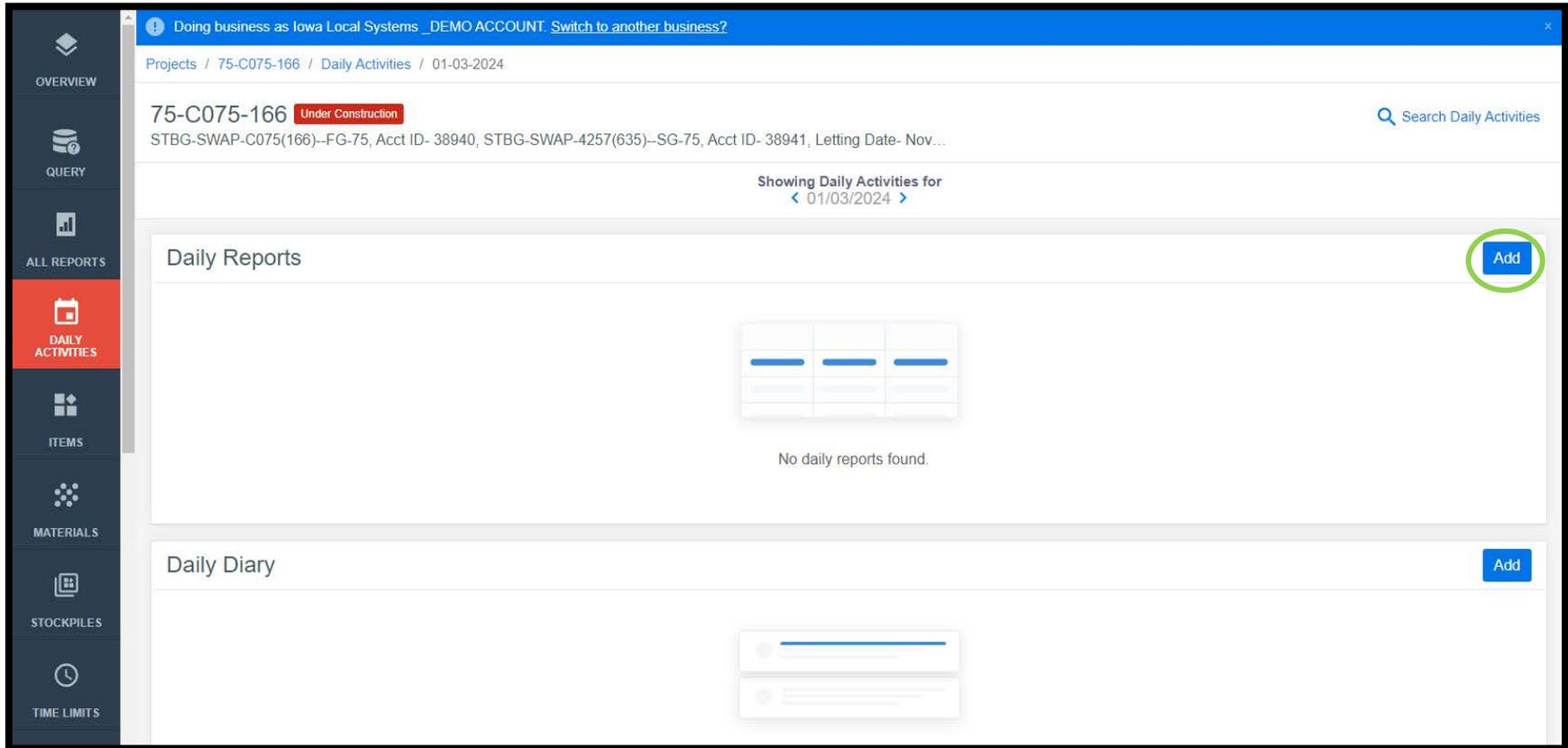
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

< January >
< 2024 >

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Note: Daily activities entries are not allowed before the “Notice to Proceed” date which was entered when the project was “Advanced to Construction”. Local Systems recommends recording the “Notice to Proceed” as the date of full contract execution. Also, you cannot make entries for dates in the future.

Once you have selected a date, the following screen will appear. Click the blue “Add” button in the upper, right corner of the box to add a new Daily Report.



Local Systems recommends that all locals use the “Daily Reports” option to enter daily information rather than the “Daily Diary”. Daily Reports are most like the conventional field book. They allow each inspector to write their own entry for project progress and provide a place to add item/quantity postings. In Appia, the Daily Diary option is used on a project manager level to summarize individual daily reports. It does not provide a place to enter item/quantity postings. If you are familiar with the program and want to use Daily Dairies in addition to Daily Reports, that is fine.

Note: Multiple inspectors may enter reports. However, each inspector may only enter one daily report per day.

Clicking to add a daily report will bring up the screen shown below. Notice there are 5 tabs across the top of the page. We will walk through each section.

A. Overview Tab

The Overview tab opens first. In this tab, there are multiple sections.

- Weather – Record an entry for the weather such as “raining in morning”, “sunny”, etc.
- Temperature – Record the low and high temperatures for the day.
- Weather Day toggle – Click to toggle this back and forth between “No” and “Yes”. Mark “Yes” if it was a bad weather day. **This weather day toggle is only informational. It does NOT connect to or transmit any information to the Time Limits section or the working day count.**
- Remarks – Record any pertinent information about any site activity, project progress or delay, or other information. This is equivalent to the “diary” entry in a traditional field book.
- Custom Fields – Each agency can set up custom fields of their own choosing to be shown on this Overview screen. Custom fields will also be recorded and shown on Daily Report exports. Local Systems recommends setting up custom fields for “Controlling Item of Work” and “Bid Items Affected”. These are easy places to record what bid items were important or had action on any given day.
 - In order to set up custom fields, follow the directions in the “Reference Data: Lists > Editing Lists” section of the [“Appia Project Creation & Account Management Instructions”](#) found on the [Doc Express and Appia](#) webpage on the Local Systems website.

Click the blue “Save” button in the upper, right corner when entries on this page are complete.

Here is an example of the Overview screen populated with information.

The screenshot displays the 'Overview' screen for a project. The top navigation bar includes 'OVERVIEW' (highlighted with a green circle), 'PERSONNEL', 'EQUIPMENT', 'ITEM POSTINGS', and 'ATTACHMENTS'. The project title is 'BROS-C086(60)--8J-86 - 31961' with a status of 'Under Construction' and a letting date of 'October 21, 2014'. The left sidebar contains various navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS, CONTRACTORS, and FUNDING. The main content area is titled 'Edit' and includes a 'Save' and 'Cancel' button. The report details section shows: Report Date (06/05/2019), Prime Contractor (PETERSON CONTRACTORS INC.), Created By (Nicole Stinn), and Report Status (Draft). The weather section indicates 'Sunny' conditions with a low of 75 and a high of 80, and a 'Weather Day' toggle set to 'NO'. The 'Remarks' section contains three paragraphs of text describing piling work and equipment issues. The 'Controlling Item of Work' section lists 'Piles, Steel, HP 10x57'. The 'Bid Items Affected' section lists: Native Grass Seeding, Wetland Grass Seeding, Seeding and Fertilizing (Rural), Stabilizing Crop - Seeding and Fertilizing, and Reinforcing Steel. A 'Help' button is located in the bottom right corner.

B. Personnel Tab

The second tab in the Daily Activities menu is Personnel. To navigate to the Personnel tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.

The screenshot displays the Appia software interface for editing a daily report. At the top, a green notification bar states "The daily report has been saved successfully." Below this, the breadcrumb trail reads "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag and the letting date "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A horizontal menu at the top contains tabs for "OVERVIEW", "PERSONNEL", "EQUIPMENT", "ITEM POSTINGS", and "ATTACHMENTS". The "PERSONNEL" tab is highlighted with a green circle. The left sidebar contains navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST. The main content area is titled "Edit" and includes fields for "Report Date" (12/19/2018), "Prime Contractor" (PETERSON CONTRACTORS INC.), "Created By" (Nicole Stinn), and "Report Status" (Draft). There are also input fields for "Weather", "Temperature" (Low and High), and a "Weather Day" toggle set to "NO". Below these are two rich text editors for "Remarks" and "Bid Items Affected", each with a 14px font size and standard text formatting tools. "Save" and "Cancel" buttons are located in the top right, and a "Help" button is in the bottom right.

The location of the tab in the vertical list is shown in this view.

LABS

BROS-C086(60)--8J-86 - 31961 Under Construction

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Submit For Approval Actions Reports

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

Daily Report Edit

Report Date: 12/22/2018

Report Status: Draft

Prime Contractor: PETERSON CONTRACTORS INC.

Weather Day?: No

Weather: Cloudy, Drizzle

Temperature: Low: 30° High: 39°

Created By: Nicole Stinn on 12/09/2020 02:38 PM EST

Remarks: Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time.

Controlling Item of Work: Clearing and Grubbing

Personnel Edit

1 No personnel found.

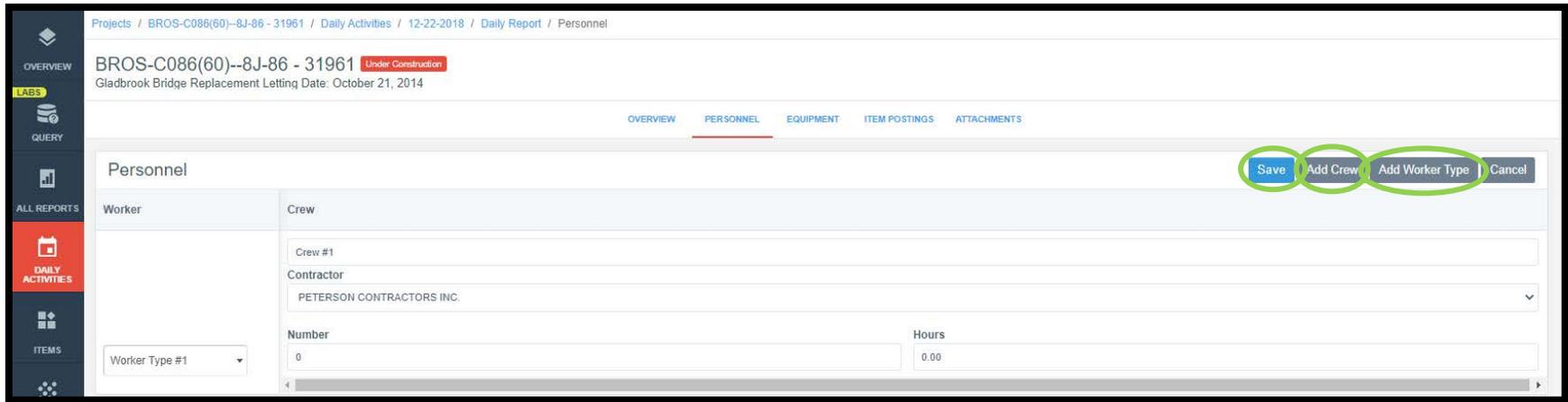
Equipment Edit

1 No equipment found.

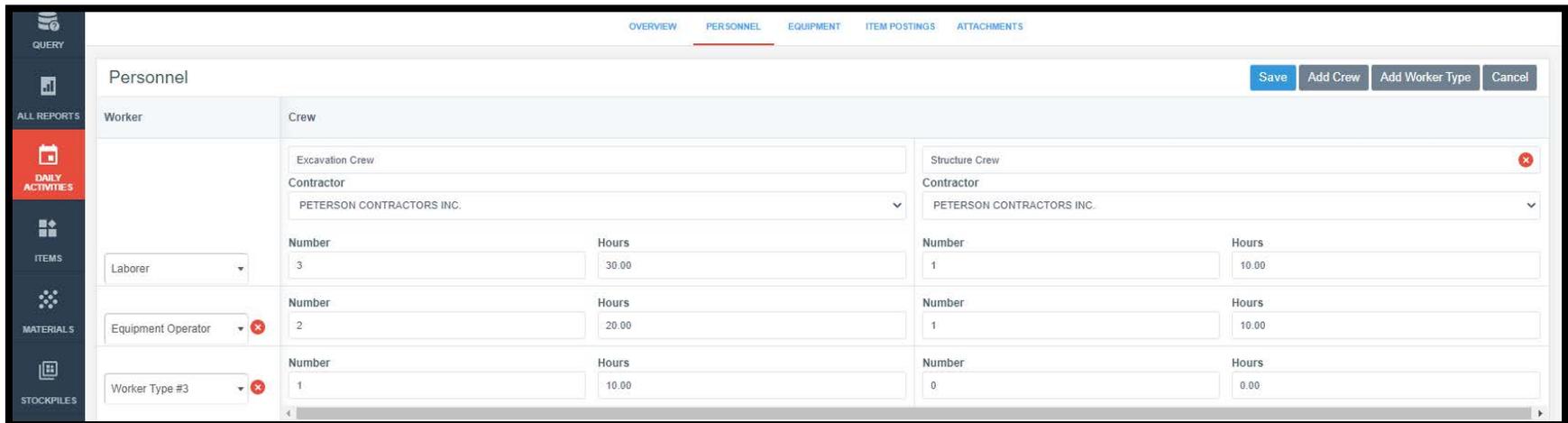
Item Postings Edit

1 No items found.

In order to edit the personnel information, click on either the Personnel tab at the top or on the “Edit” button on the right side of the Personnel line as shown in the screenshots above. Either click will bring you to the following screen. This screen will contain generic names for the worker type and crew number and will list “0” entries for the number of type of workers present and cumulative hours worked by that type of worker. You can replace the generic entries with names and types specific to your project. To add additional crews or additional types of workers, click the gray “Add Crew” or “Add Worker Type” buttons, respectively on the right side of the screen. When you have finished entering information, click the blue “Save” button on the right side of the screen.



You may enter specific information for as many of the fields as desired. The view below shows an example with multiple crews and workers.



Once the personnel information has been entered and the save button has been clicked, you will be brought back to the main daily activity screen, which should now show the personnel information you just entered.

Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-22-2018 / Daily Report

BROS-C086(60)--8J-86 - 31961 Under Construction [Submit For Approval](#) [Actions](#) [Reports](#)

Daily Report [Edit](#)

Report Date
12/22/2018

Report Status
Draft

Prime Contractor
PETERSON CONTRACTORS INC.

Weather
Cloudy, Drizzle

Weather Day?
No

Temperature
Low: 30° High: 39°

Created By
Nicole Stinn on 12/09/2020 02:38 PM EST

Remarks
Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time.

Controlling Item of Work
Clearing and Grubbing

Personnel [Edit](#)

Excavation Crew – PETERSON CONTRACTORS INC.	
Laborer 2	30.00 hours
Equipment Operator 2	20.00 hours
Worker Type #3 1	10.00 hours
Structure Crew – PETERSON CONTRACTORS INC.	
Laborer 1	10.00 hours
Equipment Operator 1	10.00 hours

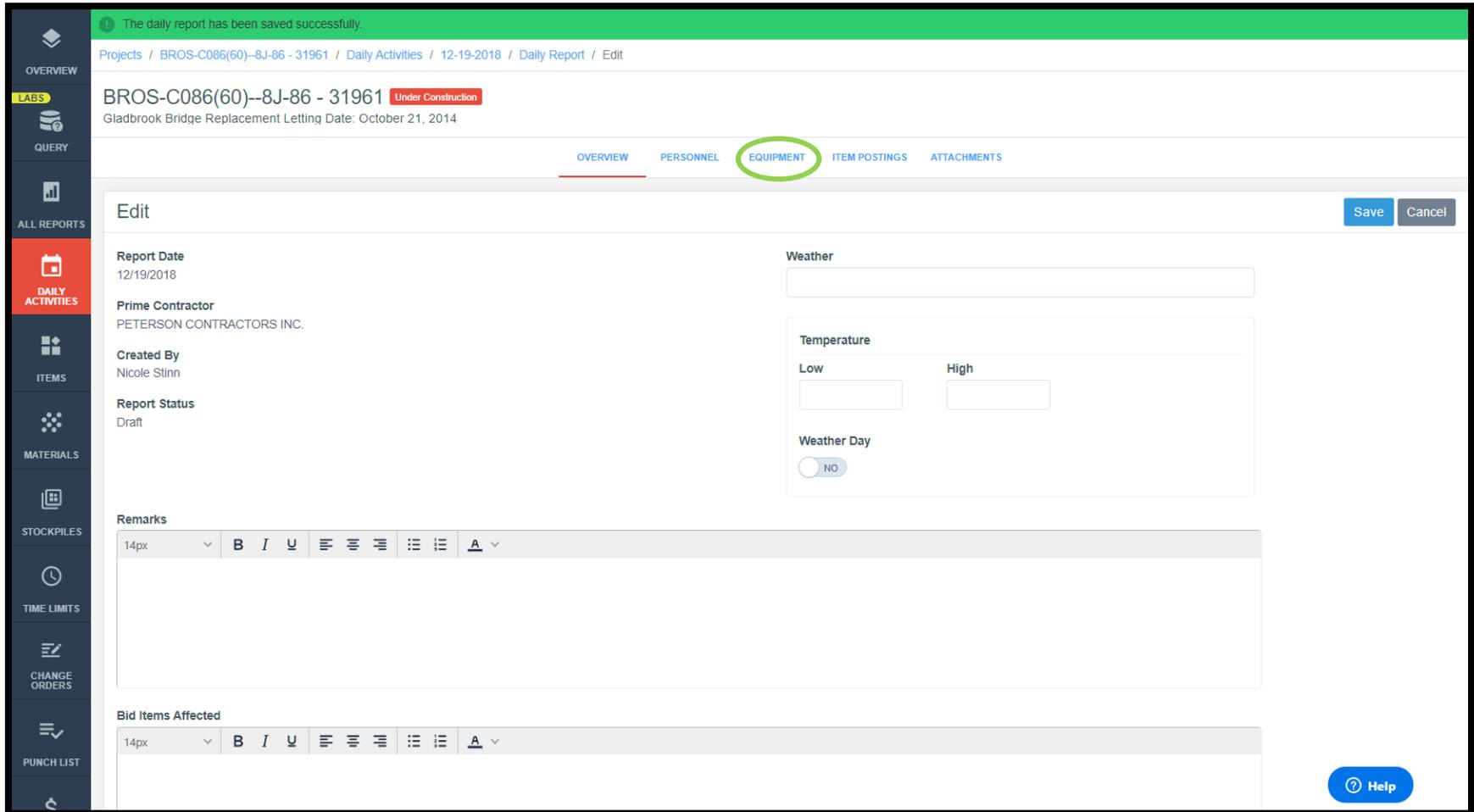
Displaying all 2 crews

Equipment [Help](#) [Edit](#)

C. Equipment Tab

The third tab in the Daily Activities menu is Equipment. To navigate to the Equipment tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.



The location of the tab in the vertical list is shown in this view.

LABS
BROS-C086(60)--8J-86 - 31961 Under Construction
Gladbrook Bridge Replacement Letting Date: October 21, 2014

Submit For Approval **Actions** **Reports**

Daily Report Edit

Report Date
12/22/2018

Report Status
Draft

Prime Contractor
PETERSON CONTRACTORS INC.

Weather Day?
No

Weather
Cloudy, Drizzle

Temperature
Low: 30° High: 39°

Created By
Nicole Stinn on 12/09/2020 02:38 PM EST

Remarks
Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time.

Controlling Item of Work
Clearing and Grubbing

Personnel Edit

1 No personnel found.

Equipment Edit

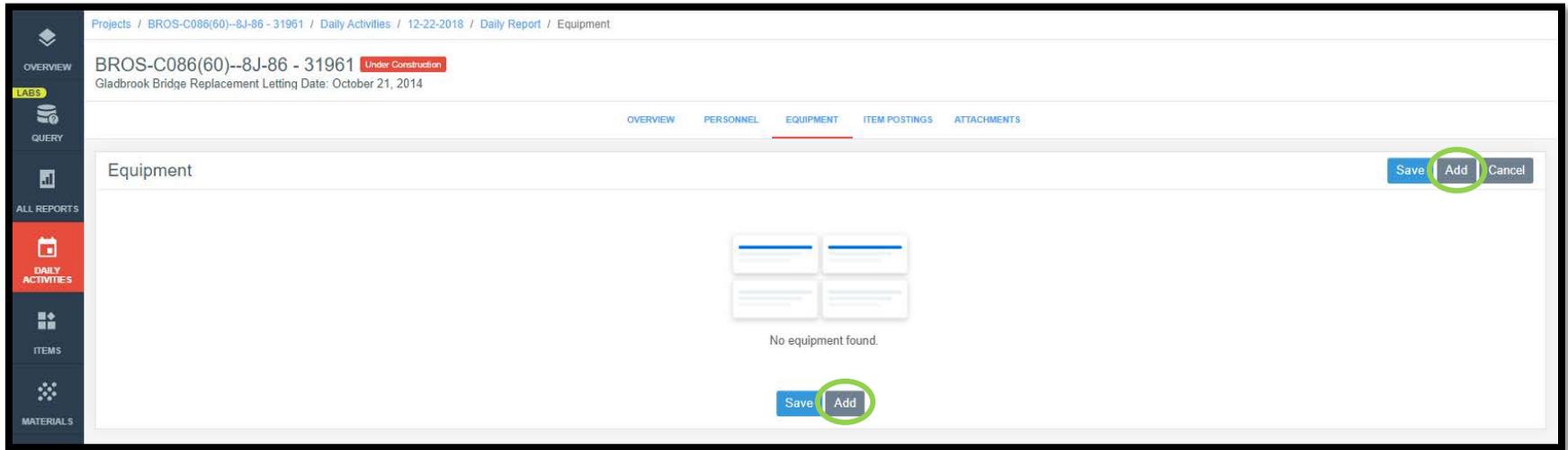
1 No equipment found.

Item Postings Edit

1 No items found.

LABS
QUERY
ALL REPORTS
DAILY ACTIVITIES
ITEMS
MATERIALS
STOCKPILES
TIME LIMITS
CHANGE ORDERS
PUNCH LIST
PAYMENTS

In order to edit the equipment information, click on either the Equipment tab at the top or on the “Edit” button on the right side of the Equipment line as shown in the screenshots above. Either click will bring you to the following screen. To add equipment information, click on the gray “Add” button on either the right side or bottom of the screen.



You may enter specific information for as many of the fields as desired. The view below shows an example with project information entered. Additional pieces of equipment can be added by clicking the gray “Add” button. When you have finished entering information, click the blue “Save” button on both the right side and bottom of the screen.

The screenshot displays the 'Equipment' management interface. At the top, there are navigation tabs: OVERVIEW, PERSONNEL, EQUIPMENT (selected), ITEM POSTINGS, and ATTACHMENTS. A green notification bar at the top states 'The equipment has been saved successfully.' The interface shows two equipment entries, each with the following fields:

- Description:** Bulldozer (top entry) and Excavator (bottom entry)
- Contractor:** PETERSON CONTRACTORS INC. (both entries)
- Active Count:** 1 (both entries)
- Active Hours:** 8.00 (both entries)
- Idle Count:** 1 (both entries)
- Idle Hours:** 2.00 (both entries)
- Comments:** Bulldozer pushing downed trees to pile for disposal. (top entry) and Excavation grabbing downed trees and moving where they can be pushed by bulldozer. (bottom entry)

Buttons for 'Save' (blue) and 'Add' (gray) are highlighted with green circles at the top right and bottom center of the screen. A 'Cancel' button is also visible at the top right.

Once the equipment information has been entered and the save button has been clicked, you will be brought back to the main daily activity screen, which should now show the equipment information you just entered.

The screenshot displays a software interface for a daily activity log. On the left is a dark sidebar with navigation icons and labels: MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS, CONTRACTORS, FUNDING, and MORE. The main content area is white and contains the following sections:

- Text:** "Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time."
- Controlling Item of Work:** Clearing and Grubbing
- Personnel:** A table listing crew members and their hours.

Crew Name	Role	Count	Hours
Excavation Crew – PETERSON CONTRACTORS INC.	Laborer	3	30.00 hours
	Equipment Operator	2	20.00 hours
	Worker Type #3	1	10.00 hours
Structure Crew – PETERSON CONTRACTORS INC.	Laborer	1	10.00 hours
	Equipment Operator	1	10.00 hours
- Equipment:** A table with columns: Description, Active, Idle, Comments, Contractor. A green oval highlights this section.

Description	Active	Idle	Comments	Contractor
Bulldozer	1 (8.00 hours)	1 (2.00 hours)	Bulldozer pushing downed trees to pile for disposal.	PETERSON CONTRACTORS INC.
Excavator	1 (8.00 hours)	1 (2.00 hours)	Excavation grabbing downed trees and moving where they can be pushed by bulldozer.	PETERSON CONTRACTORS INC.
- Item Postings:** No items found.
- Attachments:** No attachments found.

D. Item Postings Tab

The fourth tab in the Daily Activities menu is Item Postings. Item postings are entries made for quantity progress on bid items. (Some users will have used DOT-provided “E-sheets” in Excel for the purpose of quantity entries and measurements in the past. This tab is where that information should be entered.)

To navigate to the Item Postings tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.

The screenshot displays the Appia software interface. At the top, a green notification bar states "The daily report has been saved successfully." Below this, the breadcrumb trail reads "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A navigation bar contains tabs for "OVERVIEW", "PERSONNEL", "EQUIPMENT", "ITEM POSTINGS" (highlighted with a green circle), and "ATTACHMENTS". The "Edit" form includes fields for "Report Date" (12/19/2018), "Prime Contractor" (PETERSON CONTRACTORS INC.), "Created By" (Nicole Stinn), and "Report Status" (Draft). There are also input fields for "Weather", "Temperature" (with "Low" and "High" sub-fields), and a "Weather Day" toggle set to "NO". A "Remarks" section features a rich text editor with a 14px font size and various formatting options. At the bottom, a "Bid Items Affected" section also includes a rich text editor with a 14px font size. The left sidebar contains navigation icons for OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and DIMCH LIST.

The location of the tab in the vertical list is shown in this view.

LABS BROS-C086(60)--8J-86 - 31961 Under Construction [Submit For Approval](#) [Actions](#) [Reports](#)

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Daily Report [Edit](#)

Report Date 12/22/2018	Report Status Draft
Prime Contractor PETERSON CONTRACTORS INC.	Weather Day? No
Weather Cloudy, Drizzle	Temperature Low: 30° High: 39°
Created By Nicole Stinn on 12/09/2020 02:38 PM EST	
Remarks Today, Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and see if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought up at this time.	
Controlling Item of Work Clearing and Grubbing	

Personnel [Edit](#)

1 No personnel found.

Equipment [Edit](#)

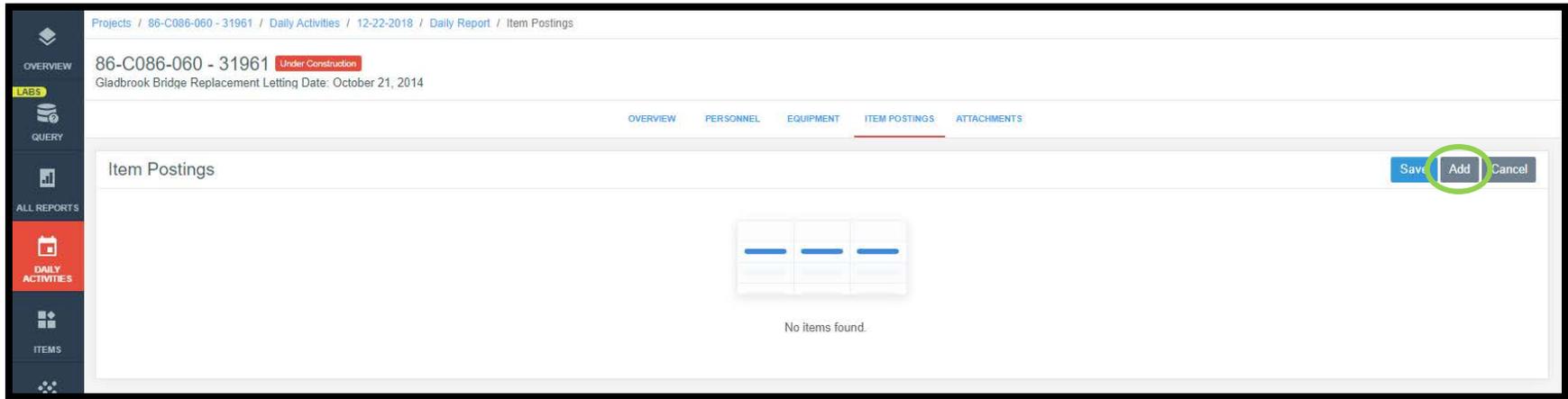
1 No equipment found.

Item Postings [Edit](#)

1 No items found.

LABS **QUERY** **ALL REPORTS** **DAILY ACTIVITIES** **ITEMS** **MATERIALS** **STOCKPILES** **TIME LIMITS** **CHANGE ORDERS** **PUNCH LIST** **PAYMENTS**

In order to edit the item posting (quantity posting) information, click on either the Item Posting tab at the top or on the “Edit” button on the right side of the Item Posting line as shown in the screenshots above. Either click will bring you to the following screen. To add item posting information, click on the gray “Add” button on the right side of the screen.



Clicking “Add” will cause a box to pop up containing all of the items on the contract. To add an entry for a particular item, simply click on the item. Clicking once will cause a “1” to appear in the green box on the left side of the item’s line. Clicking the item again will change the number to “2”. This number indicates the number of line entries that need to be added for a specific item. For example, if an item has associated work completed at two different locations, you would want to click twice to be able to add two quantity measurements to the report record. If you accidentally click on an item or click on an item too many times and have more entries than needed, simply click the red circle with the “x” on the right side of the line to remove the entry.

Add Project Items

Search

0	0170	2507-3250005	ENGINEERING FABRIC	SY	2,805.000	0.000	2,805.000	✕
0	0180	2507-6800061	REVTMENT, CLASS E	TON	2,180.000	0.000	2,180.000	✕
1	0190	2533-4980005	MOBILIZATION	LS	1.000	0.000	1.000	✕
0	0200	2536-6745045	RMVL OF ASBESTOS	LS	1.000	0.000	1.000	✕
Section: 2 - ROADWAY ITEMS								
2	0210	2101-0850001	CLEAR+GRUBB	ACRE	2.700	0.000	2.700	✕
0	0220	2102-2625001	EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH	CY	36,540.000	0.000	36,540.000	✕
0	0230	2102-2710070	EXCAVATION, CL 10, RDWY+BORROW	CY	24,950.000	0.000	24,950.000	✕
0	0240	2105-8425015	TOPSOIL, STRIP, SALVAGE+SPREAD	CY	5,920.000	0.000	5,920.000	✕
0	0250	2115-0100000	MODIFIED SUBBASE	CY	75.000	0.000	75.000	✕

3 Item(s)

Add Items
Cancel

If you don’t see the item you are looking for, you can search for it in the search bar at the top of the box. Also, the item could be on the next page. If you scroll through the items to get to the bottom of the box, an option for going to the next page will appear. When finished selecting

items for entry, click on the “Add Items” button in the bottom, right corner. Items added by change order will only be visible and available for selection if the change order is in pending or approved status.

Add Project Items

Search for Line Number, Item ID, Description and Unit Search

0	0230	2102-2710070	EXCAVATION, CL 10, RDWY+ ROW	CY	24,950.000	0.000	24,950.000	✕
0	0240	2105-8425015	TOPSOIL, STRIP, SALVAGE+SPREAD	CY	5,920.000	0.000	5,920.000	✕
0	0250	2115-0100000	MODIFIED SUBBASE	CY	75.000	0.000	75.000	✕
0	0260	2123-7450000	SHLD CONSTRUCTION, EARTH	STA	14.000	0.000	14.000	✕
0	0270	2312-8260051	GRANULAR SURFACING ON ROAD, CLASS A CRUSHED STONE	TON	1,200.000	0.000	1,200.000	✕
0	0280	2402-2720100	EXCAVATION, CL 20, RDWY PIPE CULV	CY	590.000	0.000	590.000	✕
0	0290	2416-0100036	APRONS, CONCRETE, 36 IN. DIA.	EACH	2.000	0.000	2.000	✕
0	0300	2416-1180036	CULVERT, CONCRETE ROADWAY PIPE, 36 IN. DIA.	LF	90.000	0.000	90.000	✕

1 2 Next > Last »

Displaying items 1 - 30 of 60 in total

3 Item(s) Add Items Cancel

After clicking “Add Items” in the item selection box as shown above, the following screen will appear where you can enter measurements, location information, quantities, and other remarks. In order to enter all of the information, make sure to click on the “view more” box shown below the line item.

Projects / 75-C075-166 / Daily Activities / 01-03-2024 / Daily Report / Item Postings

75-C075-166 Under Construction
 STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** ATTACHMENTS

Item Postings Import FieldGenius® Save Add Cancel

0020: 2102-2710070 CY EXCAVATION, CLASS 10, ROADWAY AND BORROW ✕					
Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed <small>Use Worksheet</small>	Total Placed	
620.000	0.000	620.000	0.000	0.000	
view more					
0120: 2303-1258283 TON ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC ✕					
Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed	
23.000	0.000	23.000	<input type="text" value="0.000"/>	<input type="text" value="0.000"/>	
view more					
0030: 2105-8425015 CY TOPSOIL, STRIP, SALVAGE AND SPREAD ✕					
Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed <small>Use Worksheet</small>	Total Placed	
2,200.000	0.000	2,200.000	0.000	0.000	
view more					
0690: 2533-4980005 LS MOBILIZATION ✕					
Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed	

Clicking on the “view more” box will cause the item line to expand to show additional fields for data entry.

The screenshot displays the 'Item Postings' interface. On the left is a navigation sidebar with icons for Overview, Query, All Reports, Daily Activities, Items, Materials, Stockpiles, Time Limits, and Change. The main area shows a table of items with columns for Authorized Quantity, Pending Quantity, Remaining Quantity, Quantity Placed, and Total Placed. Item 0120 is expanded, showing a 'view more' button and additional data entry fields: Contractor (GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.), Remarks, Location, Station From, Station To, Offset Distance, and Offset Direction. A green oval highlights the expanded data entry section.

Item ID	Description	Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
0020: 2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW	620.000	0.000	620.000	0.000	0.000
0120: 2303-1258283	ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC	23.000	0.000	23.000	0.000	0.000
0030: 2105-8425015	TOPSOIL, STRIP, SALVAGE AND SPREAD					

When a project has been set up with “yes” checked for using worksheets (see the construction settings), a blue calculator with “Use Worksheet” will show under the “Quantity Placed” column. If worksheets are being used, you must click on this calculator to enter measurements for quantity calculation. If there is no worksheet associated with the item, you can enter the quantity directly into the box.

Projects / 75-C075-166 / Daily Activities / 01-03-2024 / Daily Report / Item Postings

75-C075-166 Under Construction
 STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

Item Postings Import FieldGenius® Save Add Cancel

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
620.000	0.000	620.000	Use Worksheet	0.000
23.000	0.000	23.000	0.000	0.000
2,200.000	0.000	2,200.000	Use Worksheet	0.000

Note: Measurements entered into the worksheet will later print on quantity reports. Local Systems staff need these measurements for audit/review purposes. If you override the worksheet calculation or if you have chosen not to use worksheets, you will need to enter all measurement information in the “Remarks” section under the “view more” box or attach any appropriate drawings or files to the daily report.

Here is an example of a worksheet that is used to calculate an item with Acre units. When using a worksheet, enter the measurements into the fields provided. Click on the gray “Preview” button near the top of the worksheet to have the worksheet calculate what your quantity is. When the entered information is found to be acceptable, click the blue “Use Worksheet” button at the bottom of the worksheet.

The screenshot displays a software interface for managing item postings. The main content area shows a table of item postings with columns for Authorized Quantity, Pending Quantity, Remaining Quantity, and Quantity Placed. The right-hand panel, titled "Area: Acre", contains a "Preview" button, a "CALCULATED RESULT" of 1.033, and input fields for Length (FT) and Width (FT). The "Use Worksheet" button is highlighted at the bottom of the right panel.

Item ID	Item Name	Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed
0190-2533-4880005	MOBILIZATION	1.000	0.000	0.750	0.250
0210-2101-0850001	CLEAR+GRUBB	2.700	0.000	2.700	
0210-2101-0850001	CLEAR+GRUBB	2.700	0.000	2.700	
0380-2518-0910000	SAFETY CLOSURE				

Note: If you have chosen to use worksheets, but you want to override the worksheet’s calculation (i.e., for an irregular area), you must first use the worksheet to calculate a number. Then, you can manually override the calculated quantity if you wish. If you do override the quantity, you will need to enter all measurement information in the “Remarks” section under the “view more” box or attach any appropriate drawings or files to the daily report.

Note: Measurements entered in a worksheet will display in the Item History Report that Local Systems auditors will need. See the “Exporting Data: Export Reports” section of the [Appia Project Creation & Account Management Instructions](#) for guidance on generating that report.

If the worksheet quantity is overridden, a yellow “Manual” tag will appear on the left side of the line above the bid item name.

The screenshot displays the 'Item Postings' section of a software application. The interface includes a sidebar with navigation options like OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, PUNCH LIST, and PAYMENTS. The main content area shows a list of item postings for project 86-C086-060 - 31961. The table below summarizes the data shown in the screenshot:

Item ID	Item Name	Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
0190: 2533-4980005	MOBILIZATION	1.000	0.000	0.750	0.250	0.250
0210: 2101-0850001	CLEAR+GRUBB	2.700	0.000	1.167	1.033	1.533
0210: 2101-0850001	CLEAR+GRUBB	2.700	0.000	1.167	0.500	1.533
0380: 2518-6910000	SAFETY CLOSURE	4.000	0.000	3.000	1.000	1.000

*****It is of the utmost importance that ALL relevant data for an item posting is entered. This includes test results, all appropriate measurements, location information, and anything else pertinent to the item posting.** In order to enter these details, first make sure the “view more” tab for the item has been clicked and the “Remarks”, “Location”, and “Station” fields are visible. In those fields, enter all of the necessary information. An example is shown below. Hint: You can expand the “Remarks” box by clicking and dragging the small, gray triangle in the bottom, right corner.

OVERVIEW BROS-C086(60)--8J-86 - 31961 Under Construction
 Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** REVIEW MATERIALS ATTACHMENTS

Item Postings

0140: 2501-5478073 LF
 CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
396.000	0.000	306.000	90.000	90.000

[view more](#)

Displaying 1 item posting

[Save](#) [Add](#)

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** ATTACHMENTS

Item Postings

0140: 2501-5478073 LF
 CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
396.000	0.000	306.000	90.000	90.000

Contractor: PETERSON CONTRACTORS INC.

Remarks:

CY Used = 17 1/4

Load Number Tested = 1

Air Test = 6.5%

Slump Test = 3 1/2"

Mix = C4WR-C20-S20

Plant = Manatts (Tama)

Location: South Pier - Piling #s 1-5

Station From: 48 + 34.00

Station To: +

[view less](#)

Displaying 1 item posting

[Save](#) [Add](#)

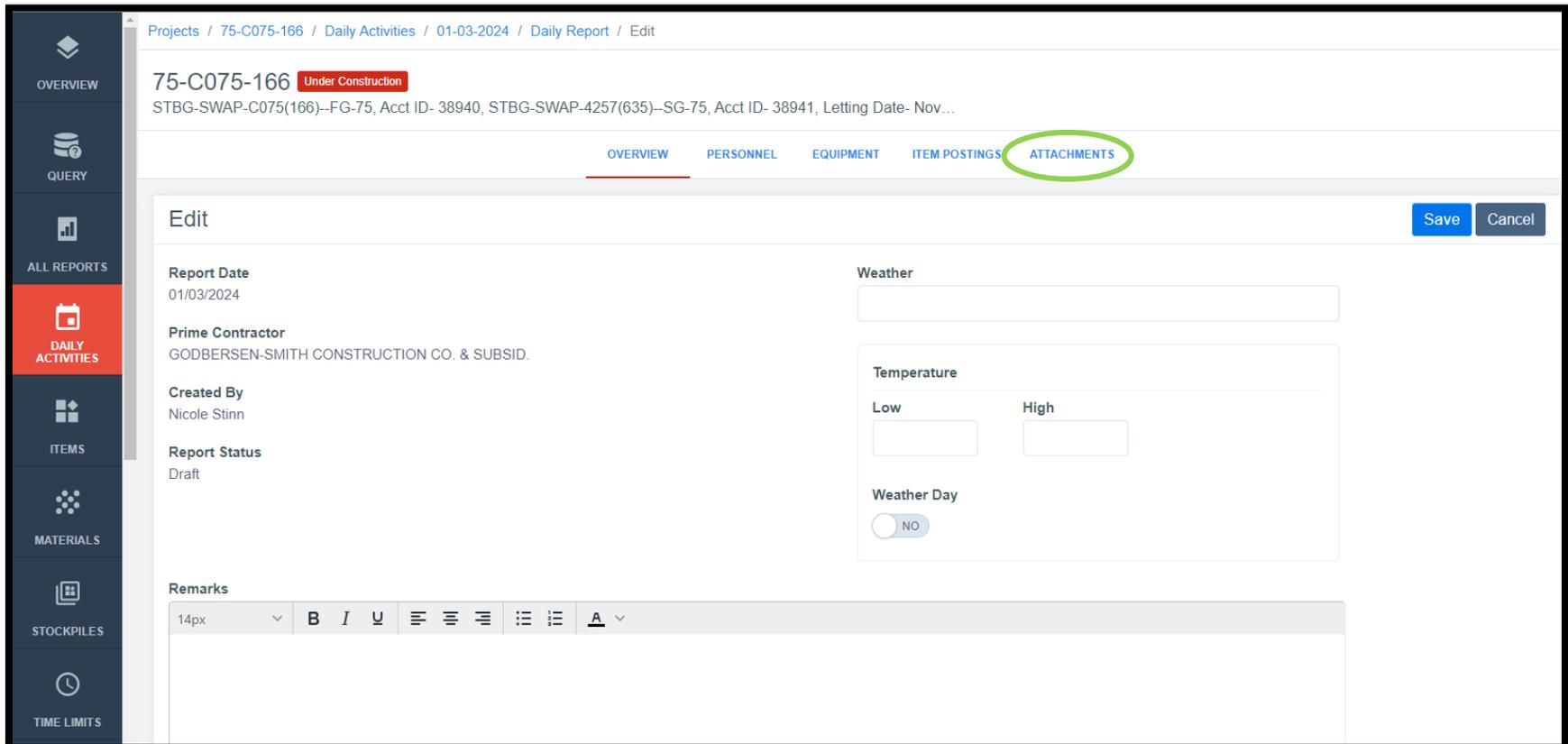
As an alternative to entering test results and other data in the remarks tab, users may use the DOT Excel-based "E-sheets". "E-sheets" must be uploaded to Doc Express for review/audit, but they may also be uploaded as an attachment to the Daily Report.

E. Attachments Tab

The fifth tab in the Daily Activities menu is Attachments. Appia supports attachments of all file type varieties (videos, documents, pictures, etc.) and sizes. Examples of attachments include but are not limited to videos of work or storm water inspections, survey point files, scanned hand-drawings, Excel quantity sheets (E-sheets), CAD drawings, etc.

To navigate to the Attachments tab, you can click on either the tab name near the top of the screen or in the listing, depending on which view Appia is currently showing.

The location of the top tab is shown in the view below.



The screenshot displays the Appia software interface for editing a daily activity report. The breadcrumb trail at the top reads: Projects / 75-C075-166 / Daily Activities / 01-03-2024 / Daily Report / Edit. The main header shows the project ID '75-C075-166' with a red 'Under Construction' tag, followed by the activity details: 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...'. Below this is a navigation bar with tabs: OVERVIEW, PERSONNEL, EQUIPMENT, ITEM POSTINGS, and ATTACHMENTS. The 'ATTACHMENTS' tab is highlighted with a green circle. The main content area is titled 'Edit' and includes a 'Save' button and a 'Cancel' button. The form contains several fields: 'Report Date' (01/03/2024), 'Prime Contractor' (GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.), 'Created By' (Nicole Stinn), and 'Report Status' (Draft). There are also input fields for 'Weather', 'Temperature' (with 'Low' and 'High' sub-fields), and a 'Weather Day' toggle switch currently set to 'NO'. At the bottom, there is a 'Remarks' section with a rich text editor toolbar showing font size (14px), bold, italic, underline, and other formatting options.

The location of the tab in the vertical list is shown in this view.

75-C075-166 Under Construction Submit For Approval Actions ▾ Reports ▾
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...

Daily Report Edit

Report Date 01/03/2024	Report Status Draft
Prime Contractor GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	Weather Day? No
Created By Nicole Stinn on 01/12/2024 04:35 PM EST	

Personnel Edit

! No personnel found. ×

Equipment Edit

! No equipment found. ×

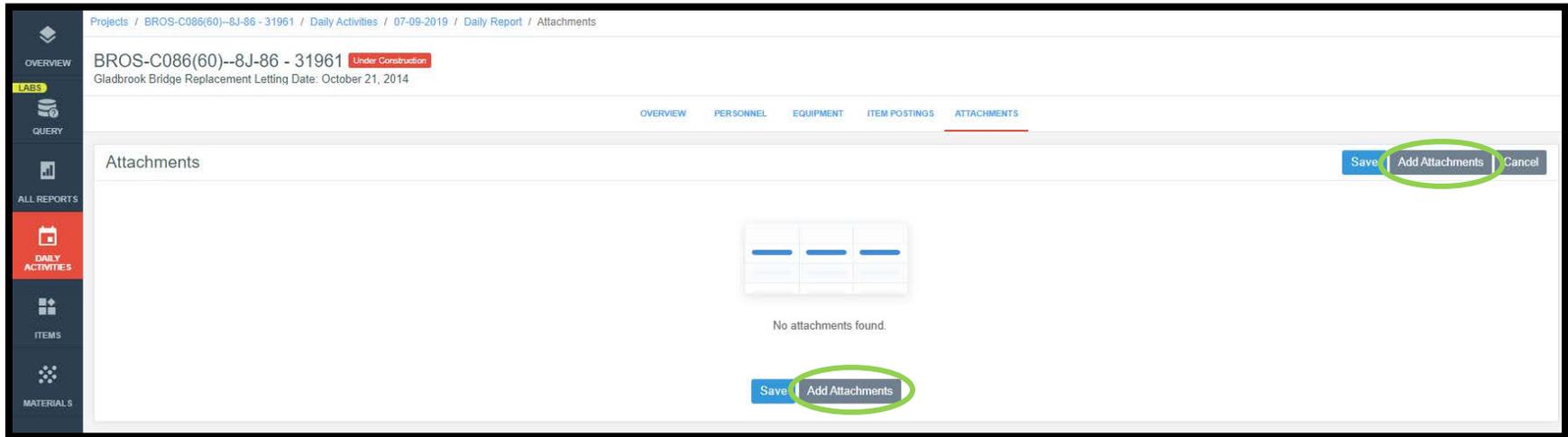
Item Postings Edit

! No items found. ×

Attachments Edit

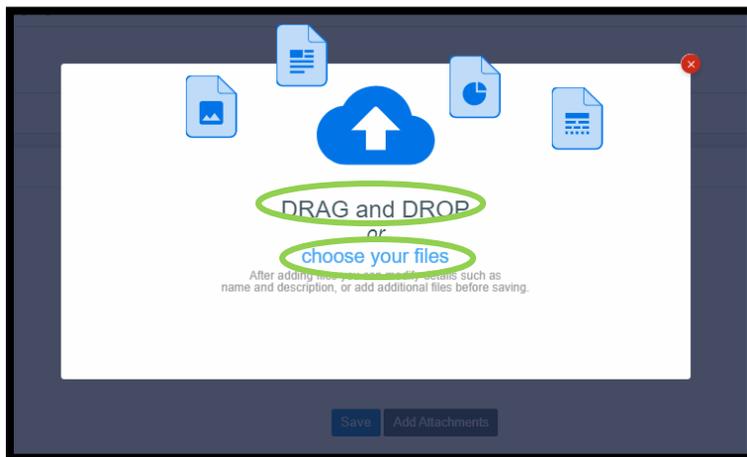
! No attachments found. ×

In order to add attachments, click on either the Attachments tab at the top or on the “Edit” button on the right side of the Attachments line as shown in the screenshots above. Either click will bring you to the following screen. To add an attachment, click on the gray “Add Attachments” button on either the right side or bottom of the screen.

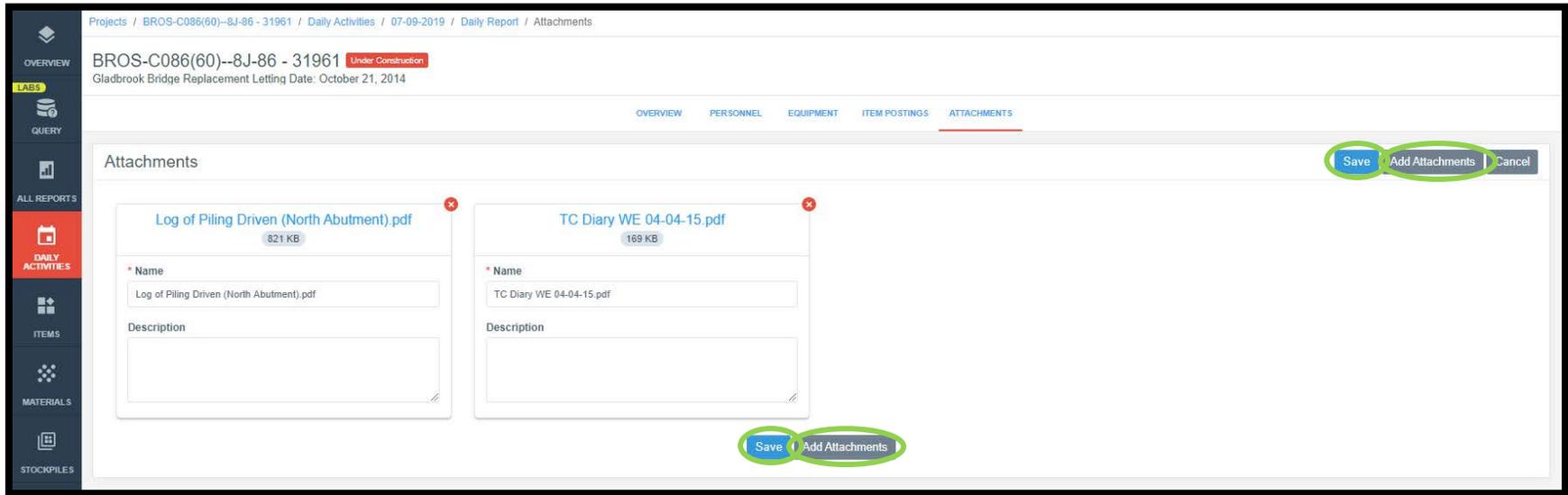


Clicking the “Add Attachments” button will cause the following pop-up box/graphic to appear. To add any desired attachments, either:

- open the file explorer on your computer and navigate to your desired file(s) and drag and drop the file into the box, or
- click on the blue “choose your files” link and then navigate to your desired file(s).



Once an attachment is chosen, the following screen will appear. If you are satisfied with the selected attachments, click the blue “Save” button in either the upper, right corner or at the bottom of the screen. If you wish to add additional attachments, click on the gray “Add Attachments” button.



Selecting “Save” will bring you back to the Overview tab where your attachments will now be listed.



F. Submitting Daily Reports for Approval & Reviewing Materials

When an inspector is done filling out a Daily Report and has double-checked the accuracy of the entries, the report may be “Submitted for Approval”. To do so, in the open report, click on the blue “Submit for Approval” button in the upper, right corner.

The screenshot shows a web interface for a project named "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The breadcrumb trail is "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 02-08-2019 / Daily Report". The main content area is titled "Daily Report" and includes the following fields:

- Report Date:** 02/08/2019
- Report Status:** Draft
- Prime Contractor:** PETERSON CONTRACTORS INC.
- Weather:** Sunny
- Weather Day?:** No
- Temperature:** Low: 26° High: 34°
- Created By:** Nicole Stinn on 12/31/2020 03:14 PM EST
- Remarks:** Today PCI poured the rest of the south pier encasements. 18 cubic yards of concrete was ordered and 17 3/4 was placed. I tested the 1st truck to the site for air and slump. The air was 6.5% and the slump was 3 1/2". They had a slight problem with encasement 5. The bottom of the encasement started to move which allowed some concrete to flow out of the encasement. Kenny (PCI foreman) got the hole fixed and there was no more concrete flowing out. Other than that the pour went very well. No other concerns or questions came up at that time.
- Controlling Item of Work:** Concrete Encasement of Steel H-Piles, HP 14x73 (P10L Type 3)

At the bottom of the report form, there is a "Personnel" section with the message "No personnel found." In the top right corner of the report form, there is a blue button labeled "Submit For Approval" which is circled in green. Other buttons include "Actions", "Reports", and "Edit".

Depending on the role type set for the user submitting the report, a pop-up box may appear saying “The daily report has materials to be reviewed” when the “Submit for Approval” button is selected. This box is shown here.

The screenshot shows a pop-up dialog box with a white background and a grey border. The text inside the box reads "The daily report has materials to be reviewed". At the bottom right of the box, there are two buttons: a blue button labeled "Review Materials" and a grey button labeled "Submit For Approval".

There are often multiple materials associated with a given bid item (i.e., materials for a PCC item would include portland cement, fly ash, slag, potable water, aggregate, etc.). **Certifications, or known sources, in the case of an approved source requirement, for ALL materials must be in-hand before payment is made for the bid item associated with these materials.** An exception would be cases where certifications are received as part of a plant book at the conclusion of an item's placement. **If the necessary certifications and/or payrolls have NOT been obtained or if payment needs to be withheld on an item due to anticipated liquidated damages, refer to the [Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#) section.**

Appia will exclude the item posting(s) in the Daily Report from current and future payments as long as the Daily Report remains un-approved. Once it is approved, the item posting(s) will be pulled into a payment.

If you are the one in your organization who is responsible for reviewing all materials for the presence of the necessary certifications and for ensuring all payrolls have been received, you should click the blue "Review Materials" button. If you are not the person responsible for ensuring certifications are in hand, you can choose the "Submit for Approval" button in order to pass the review responsibility to the person who approves the report. The materials MUST be reviewed before Appia will allow the Daily Report to be approved.

When the "Review Materials" choice is selected, a screen will appear showing each of the bid items and their associated materials. For projects imported prior to the implementation of Reference Data Collections (generally prior to 2025), each material associated with a bid item will display on the Review Materials screen. For projects imported using Iowa DOT's Reference Data Collection, each bid item will have three "materials" lines: the bid item itself, a payroll item, and a liquidated damages item.

All materials have a usage rate set to 0.000, and the Material Quantity field on the Review Materials screen will default to 0.000. **If certifications and payrolls have been obtained for all items posted in the Daily Report, and if payment does not need to be withheld for anticipated liquidated damages (see [I.M. 6.000, Attachment D](#)), leave all quantities on the Review Materials screen as 0.000. If all applicable certifications and payrolls have not been obtained for all items posted in the Daily Report, or if payment needs to be withheld for anticipated liquidated damages according to [I.M. 6.000, Attachment D](#), refer to the [Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#) section. Entering quantities for materials WILL result in complications with payments if the appropriate approvals are not applied in the Materials module, so quantities should not be entered on the Review Materials screen unless limit payment on the item(s) is the intended consequence.**

Example: Project imported prior to Reference Data Collections

Projects / BROS-C086(60)-8J-86 - 31961 / Daily Activities / 02-09-2019 / Daily Report / Review Materials

BROS-C086(60)-8J-86 - 31961 Under Construction
 Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS REVIEW MATERIALS ATTACHMENTS

Review Materials Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity	
0140: 2501-5478073	LF	396.000	90.000	\$76.100	0.000	
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73						
Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
READY MIX CONCRETE FOR STRUCTURES	0.000 CY/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
STEEL REINFORCEMENT, APPROVED SUPPLIER	0.000 LB/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
COARSE AGGREGATE FOR CONCRETE, STRUCTURES	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
FINE AGGREGATE FOR CONCRETE, STRUCTURES	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
FLY ASH	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
ADMIXTURES, NORMAL WATER REDUCING	0.000 GAL/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
ADMIXTURES, AIR ENTRAINING	0.000 GAL/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
WATER FOR CONCRETE AND MORTAR	0.000 GAL/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>
PORTLAND CEMENT	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	<input type="text" value="0.000"/>

Display 1 item posting

Save Help

Actual materials listed.

Usage rate should be 0.000 for all materials.

Leave material quantities as 0.000 unless missing certifications or payrolls or LDs are anticipated.

Example: Project imported using Iowa DOT's Reference Data collection

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS **REVIEW MATERIALS** ATTACHMENTS

Review Materials Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity	
0040: 2303-0000100	TON	407.000	156.780	\$108.790	0.000	
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN						
Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>
0000-0000001 PAYROLL	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>

Displaying 1 item posting Save

Materials listed for bid item, payroll, and LDs.

Usage rate should be 0.000 for all materials.

Leave material quantities as 0.000 unless missing certifications or payrolls or LDs are anticipated.

G. Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages

If any of the following criteria are met, payment should be limited/withheld on the affected bid item(s).

- The quantity of work posted in a Daily Report for the item is completed, but some or all certifications applicable to the bid item have not been received.
- Certified payrolls (for Federal-aid projects) have not been received for an item at the time a payment is to be made.
- Payment needs to be withheld on an item due to anticipated liquidated damages (see [I.M. 6.000, Attachment D](#)).

If payment is limited on an item for one of the above reasons, an explanation may be provided in the “Remarks” section of the Item Posting itself. See subsection [Item Postings Tab](#) for further guidance on item postings.

Item Postings

0110: 2408-7800000 LB
STRUCTURAL STEEL

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
1,235.000	0.000	728.660	506.340	506.340

Contractor: CHRISTENSEN BROS. INC.

Station From: [] + []

Offset Distance: []

Offset Direction: [No Type]

Remarks: Certifications for 506.34LB not received as of date of posting

Option #1 (Preferred)

****The lines described below are only available by default for projects imported using Iowa DOT's Reference Data Collection. For projects imported prior to the use of Iowa DOT's Reference Data Collection, the user can manually add these Materials to their own Reference Data Collection (see the Reference Data: Bid Items & Materials section of the [Appia Project Creation & Account Management Instruction Manual](#)). The new material will then need to be associated to the applicable bid item (see the Reference Data: Bid Items & Materials section of the [Appia Project Creation & Account Management Instruction Manual](#)).**

The preferred method of limiting payment is to utilize the functionality of the Materials module. This process starts with the Review Materials screen that must be reviewed and approved in order to approve a Daily Report. (See the [Submitting Daily Reports for Approval & Reviewing Materials](#) section for information on when/where this screen is encountered.) When payment needs to be limited due to one of the criteria listed above, a quantity is entered into the "Material Quantity" field on the applicable Material line. This quantity will display as an "insufficient quantity" (shortage) in the Materials module and will not be paid until an approved quantity is entered in the Materials module equal to the quantity entered as a "shortage" on the Review Materials screen. (See the [Releasing Previously Limited Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#) section for guidance on entering Materials approvals to release payment.)

Only enter a Material shortage quantity in the Review Materials screen associated with the Daily Report in which the item was posted. Do not continue to enter the quantity in the Review Materials screen on subsequent Daily Reports unless additional quantity is posted that needs to be limited. Only enter the amount that needs to be limited each day for the postings reflected in the Daily Report. Quantities entered in the Review Materials screen become cumulative in the Materials module.

If only a portion of the posted quantity needs to be limited, you will need to enter the full posting amount in the Review Materials screen, and then you will need to enter an approval in the Materials module for the approved portion of the posting. This will result in the non-approved portion of the posting being considered "insufficient" as desired. If only the "shortage"/"insufficient" amount is entered in the Review Materials screen, none of the posting will get picked up in the payment.

Example 1: If certifications are missing for the bid item for some, but not all, of the posted quantity, enter the whole posting amount in the “Material Quantity” field. Then, enter an approval in the Materials module for the approved portion of the posting. (See the [Releasing Previously Limited Payment on Items for Certifications, Payrolls, and Anticipated Liquidated Damages](#) section for guidance on approving Materials.)

Review Materials								Save	Cancel
Item	Unit	Authorized Quantity	Quantity Placed	Unit Price				Paid Quantity	
0040: 2303-0000100	TON	407.000	156.780	\$108.790				0.000	
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN									
Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity			
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	-120.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	120.000	120.000			
0000-0000001 PAYROLL	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000			
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000			

Example 2: If payrolls have not been received covering any of the item progress posted in the Daily Report, enter the quantity of the bid item for which payrolls have NOT been received.

Review Materials								Save	Cancel
Item	Unit	Authorized Quantity	Quantity Placed	Unit Price				Paid Quantity	
0040: 2303-0000100	TON	407.000	156.780	\$108.790				0.000	
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN									
Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity			
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000			
0000-0000001 PAYROLL	0.000 None/TON	0.000	-156.780	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	156.780	156.780			
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000			

Example 3: According to [I.M. 6.000, Attachment D](#), when liquidated damages are anticipated, item progress shall be withheld on the prime contractor's item(s) in an amount sufficient to cover the anticipated damages. If this situation applies, enter a quantity in the "Material Quantity" field on the Liquidated Damages material line that equates to the value of the anticipated damages. (A manual calculation will need to be performed to calculate the correct quantity associated with the total \$ of the anticipated damages: \$ of Anticipated LDs / item unit price = quantity entered for withholding.)

Review Materials								Save	Cancel
Item	Unit	Authorized Quantity	Quantity Placed	Unit Price			Paid Quantity		
0040: 2303-0000100	TON	407.000	156.780	\$108.790			0.000		
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN									
Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity			
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>			
0000-0000001 PAYROLL	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>			
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	-50.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	50.000	<input type="text" value="50.000"/>			

When a Material quantity has been entered but has not yet been approved, which is the case for items on which payment is being limited, in the Work Performed tab of the Payment module, the item will have a red circle with a check mark. Additionally, the payment report will show that the entire quantity is not being paid.

Example Payment screen

Line Number	Item ID	Unit	Authorized	Previous	Current	Overages	Insufficient
Section: 0001 - STP-S-C046(85)--5E-46, Roadway Items							
0040	2303-0000100	TON	\$44,277.53	\$0.00	\$0.00		
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN							
8010	2102-5020010	STA	\$30,000.00	\$0.00	\$7,500.00		
OBLITERATE OLD ROADBED							

Option #2 (Less Desirable)

The quantity placed value in the item posting on the Daily Report can be entered as 0.00, and the actual quantity placed that day can be recorded in the remarks for the item (under “view more”) so as to have a record of it on the day that it occurred. Entering item progress this way when certifications or payrolls have not been received by the time a payment is to be processed will allow the Daily Report to be approved so that all other certified items posted that day can be processed as part of a payment without payment being made on a non-certified item.

If the certification or payroll is received after the Daily Report containing the 0.00 quantity item posting has been approved and a payment has been made covering that date, an entry can be made on a later Daily Report with a quantity placed, and remarks can be entered to say that certifications or payrolls were just received, but the actual work was completed on the date corresponding to the 0.00 entry. Then, this report can be approved, and the item will be paid on the next payment.

Option #3 (Less Desirable)

If there is more than one Appia user for your organization, a second user can enter an Item Posting with the actual quantity in a Daily Report on the date the work was performed. This daily report would need to remain un-approved until certifications are received. Once certifications are received, the report can be approved. It will be incorporated into the next payment even if it is prior to the payment dates covered by that payment.

Option #4 – No payment

If a payment is not ready to be made, the Daily Report can simply be left in draft status until the certification or payroll is received. No items in the draft Daily Report will be brought into a payment.

H. Additional “Daily Activities” Information

If you close out of a Daily Report or want to make changes to a previously entered report, you can always select the date from the calendar and get back to the report. In order to open the report for editing, just click on the blue circle with the pencil in it on the right side of the line.

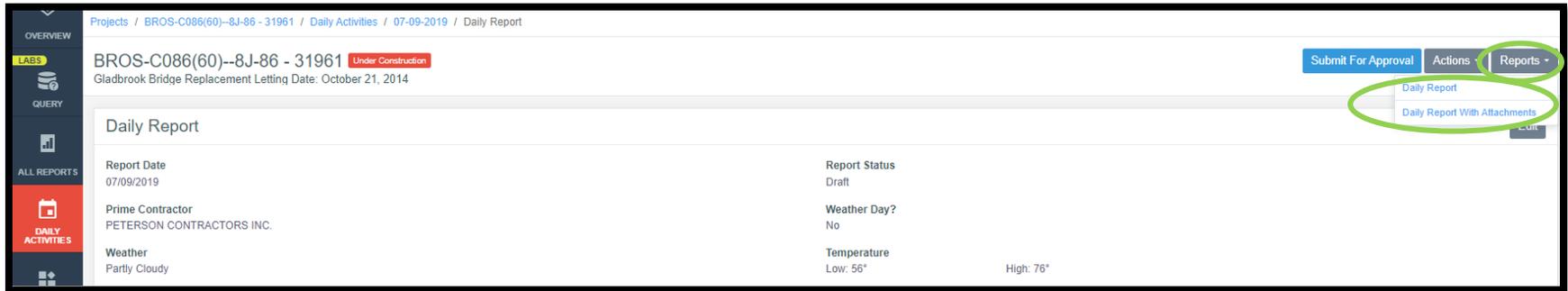
If you want to see what status your report is in (Draft, Pending, or Approved), you can look in the Status column on the view. Additionally, the calendar view will list the report’s status.

Inspector	Status	Remarks	
Nicole Stinn	Draft	Today Niki (Asst. Engineer) and I went to Gladbrook and spoke with Steve (PCI foreman). We wanted to make sure all the survey stakes were in place and ask if Steve had any questions. The stakes were placed and the PCI crew had started clearing trees. No other questions or concerns were brought...	  

If you want to use the information from the selected report to start another report rather than re-entering much of the same information (like personnel and equipment), you can click here to make a copy.

To delete a report, click on the red circle with the “x” at the right end of the line. Note: Once a report is approved, it may take a higher-level project role to un-approve and then delete it.

If you would like to generate a PDF of a Daily Report, select the desired report to open it and then click on the gray “Reports” button in the top-right corner of the Daily Report screen and choose either “Daily Report” or “Daily Report With Attachments” (if available) from the drop-down menu.



A PDF will be generated which captures all of the data entered for the report. If the “Daily Report With Attachments” option is selected, any attachments will print along with the report details. An example is shown below. (See the [Attachments Tab](#) section for instructions on adding attachments.)



Tama County Highway Department
Daily Report
 BROS-C086(60)--8J-86 - 31961

Description Gladbrook Bridge Replacement
 Letting Date: October 21, 2014

Report Date 02/08/2019

Prime Contractor PETERSON CONTRACTORS INC.
 104 BLACK HAWK
 REINBECK, IA

Status Draft

Weather Sunny

Temperature 26° to 34°

Created By Nicole Stinn on 12/31/2020 03:14 PM EST

Remarks Today PCI poured the rest of the south pier encasements. 18 cubic yards of concrete was ordered and 17 3/4 was placed. I tested the 1st truck to the site for air and slump. The air was 6.5% and the slump was 3 1/2". They had a slight problem with encasement 5. The bottom of the encasement started to move which allowed some concrete to flow out of the encasement. Kenny (PCI foreman) got the hole fixed and there was no more concrete flowing out. Other than that the pour went very well. No other concerns or questions came up at that time.

Controlling Item of Work

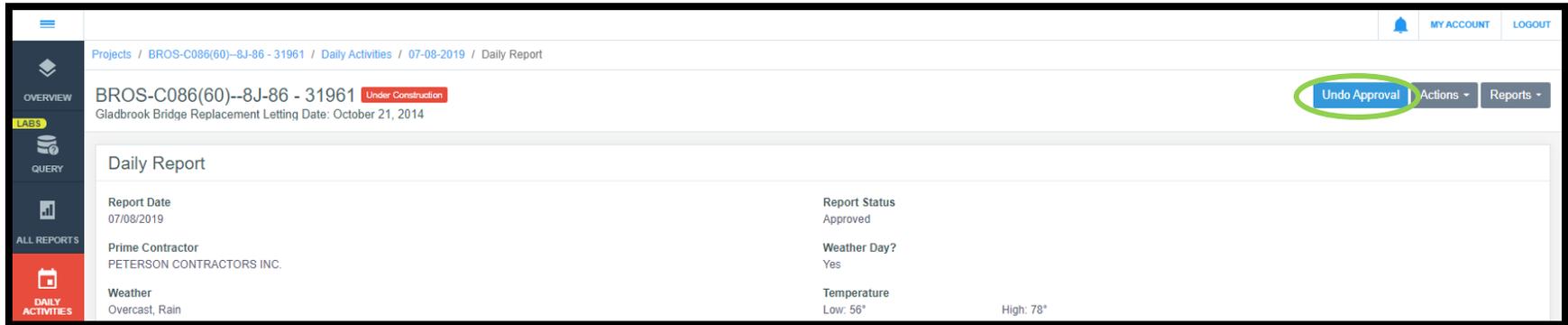
Concrete Encasement of Steel H-Piles, HP 14x73 (P10L Type 3)

Item Postings

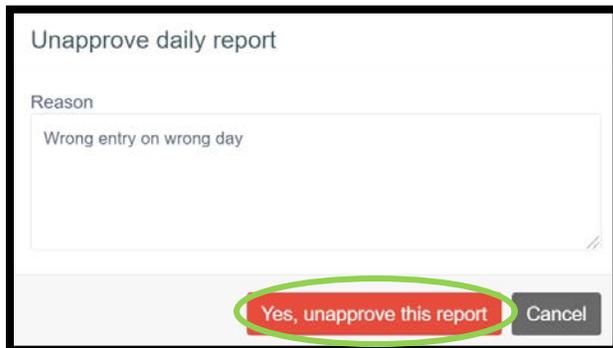
Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE					
0140	2501-5478073	LF	\$76.100	90.000	\$6,849.00
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73					
Contractor: PETERSON CONTRACTORS INC.					
Location: South Pier - Piling #s 1-5 Station From: 48+34					
Remarks: CY Used = 17 1/4 Load Number Tested = 1 Air Test = 6.5% Slump Test = 3 1/2" Mix = C4WR-C20-S20 Plant = Manatts (Tama)					
Funding Details					
HBP Federal Aid (Non-FM)				90.000	\$6,849.00
Material	Unit	Fund Package	Quantity Used		
ADMIXTURES, AIR ENTRAINING	GAL	HBP Federal Aid (Non-FM)	0.000		
ADMIXTURES, NORMAL WATER REDUCING	GAL	HBP Federal Aid (Non-FM)	0.000		
COARSE AGGREGATE FOR CONCRETE, STRUCTURES	TON	HBP Federal Aid (Non-FM)	0.000		
FINE AGGREGATE FOR CONCRETE, STRUCTURES	TON	HBP Federal Aid (Non-FM)	0.000		
FLY ASH	TON	HBP Federal Aid (Non-FM)	0.000		
PORTLAND CEMENT	TON	HBP Federal Aid (Non-FM)	0.000		
READY MIX CONCRETE FOR STRUCTURES	CY	HBP Federal Aid (Non-FM)	0.000		
STEEL REINFORCEMENT, APPROVED SUPPLIER	LB	HBP Federal Aid (Non-FM)	0.000		
WATER FOR CONCRETE AND MORTAR	GAL	HBP Federal Aid (Non-FM)	0.000		
1 item posting				Total Posted Amount: \$6,849.00	

I. Un-approving a Daily Report

There may be occasions which make it necessary for an approved Daily Report to be un-approved and revised. To undo the approval of a previously approved Daily Report, click on the blue “Undo Approval” button in the upper, right corner of the selected Daily Report. Note: Not all user roles have a high enough level of access to undo approval on a Daily Report. If this button does not appear, it is likely that your access type is not adequate to make the change.



When un-approval of a report is requested, this pop-up box will appear, and the person performing the un-approving action will have to enter a reason for retracting the report. When a reason has been entered, click the red “Yes, unapprove this report” button.



Once un-approved, the status of the Daily Report should change to “pending”.

Note: If the Daily Report has been included on a payment that is in Pending or Approved status, the payment must be brought back to Draft status before the Daily Report can be unapproved. If the Daily Report has been included on a payment that has been put in Paid status, it cannot be unapproved (no exceptions!).

6 - Items

The Items tab contains a listing of each contract item and displays each item's progress to date. This tab can be accessed on the left toolbar as shown below. **The Items tab is NOT where you record item quantity progress or input item quantities for payment.** Item quantities are input in the Item Postings tab of the Daily Report. Refer to [Subsection D. Item Postings Tab](#) in [Section 4. Daily Reports and Postings](#) for information on entering quantities.

The screenshot displays the 'Overview' page for project 75-C075-166, which is marked as 'Under Construction'. The left sidebar contains navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, **ITEMS** (highlighted with a red circle), MATERIALS, STOCKPILES, and TIME LIMITS. The main content area is divided into several sections:

- General Information:** Includes a 'Project' section with 'Work Type' PCC PAVEMENT WIDENING / PCC RESURFACING, a 'Location' section with details about K 49, and a 'Management' section with 'Prime Contractor' GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.
- Awarded Amount:** \$2,482,485.15
- Authorized Amount:** \$2,482,485.15
- Approved Changes:** \$0.00
- Description:** STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022
- Amount Paid:** A table showing 0% of the awarded and authorized amounts have been paid so far.

Amount paid so far	0%	of your Awarded	0%	of your Authorized	0%
\$0.00		\$2,482,485.15		\$2,482,485.15	

When the Items tab is opened, a view will appear showing each item and each item's progress.

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount
0010	2102-2625000	CY	4,360.000	4,360.000	711.111	\$15.000	\$65,400.00
EMBANKMENT-IN-PLACE							
Quantity Placed			Quantity Paid				
16.3%			0.0%				
0020	2102-2710070	CY	620.000	620.000	0.000	\$10.000	\$6,200.00
EXCAVATION, CLASS 10, ROADWAY AND BORROW							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0030	2105-8425015	CY	2,200.000	2,200.000	0.000	\$8.000	\$17,600.00
TOPSOIL, STRIP, SALVAGE AND SPREAD							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0040	2115-0100000	CY	636.000	636.000	0.000	\$80.000	\$50,880.00
MODIFIED SUBBASE							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0050	2123-7450000	STA	7.900	7.900	0.000	\$220.000	\$1,738.00
SHOULDER CONSTRUCTION, EARTH							
Quantity Placed			Quantity Paid				
0.0%			0.0%				
0060	2123-7450020	STA	49.000	49.000	40.000	\$220.000	\$10,780.00
SHOULDER FINISHING, EARTH							
Quantity Placed			Quantity Paid				
81.6%			0.0%				

Each section will have its own header, so if multiple sections (divisions) are present within a project, you will be able to identify the items within each section. Additionally, a total cost per section is shown in the right column at the bottom of each section's item listing as shown below. The total contract cost will be shown after the last section as well.

MOBILIZATION									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
0200	2536-6745045	LS	1.000		1.000	0.000	\$6,300.000		\$6,300.00
RMVL OF ASBESTOS									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
Displaying all 20 items									Section Total: \$913,128.99
Section: 2 - ROADWAY ITEMS Add Unattached									
0210	2101-0850001	ACRE	2.700		2.700	0.000	\$4,250.000		\$11,475.00
CLEAR+GRUBB									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
0220	2102-2625001	CY	36,540.000		36,540.000	0.000	\$6.750		\$246,645.00
EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
0230	2102-2710070	CY	24,950.000		24,950.000	0.000	\$3.500		\$87,325.00
EXCAVATION, CL 10, RDWY+BORROW									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
0240	2105-8425015	CY	5,920.000		5,920.000	0.000	\$4.000		\$23,680.00
TOPSOIL, STRIP, SALVAGE+SPREAD									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
0250	2115-0100000	CY	75.000		75.000	0.000	\$60.000		\$4,500.00
MODIFIED SUBBASE									
Quantity Placed					Quantity Paid				
0.0%					0.0%				
0260	2123-7450000	STA	14.000		14.000	0.000	\$225.000		\$3,150.00

Note: For contracts containing multiple projects which share time limit constraints, each project in the contract will be set up and displayed as a section rather than as its own project. Multiple project contracts must be set up this way in order to share time charges.

There is an option to add unattached items to the project. However, this should not be done for DOT-let projects. The DOT requires a change order to be used to add an item to a contract.

MOBILIZATION									
Quantity Placed					Quantity Paid				
0200	2536-6745045	LS	1.000		1.000	0.000	\$6,300.000		\$6,300.00
RMVL OF ASBESTOS									
Quantity Placed					Quantity Paid				
Displaying all 20 items									
Section: 2 - ROADWAY ITEMS									Section Total: \$913,128.99
Add Unattached									
0210	2101-0850001	ACRE	2.700		2.700	0.000	\$4,250.000		\$11,475.00
CLEAR+GRUBB									
Quantity Placed					Quantity Paid				
0220	2102-2625001	CY	36,540.000		36,540.000	0.000	\$6.750		\$246,645.00
EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH									
Quantity Placed					Quantity Paid				
0230	2102-2710070	CY	24,950.000		24,950.000	0.000	\$3.500		\$87,325.00
EXCAVATION, CL 10, RDWY+BORROW									
Quantity Placed					Quantity Paid				
0240	2105-8425015	CY	5,920.000		5,920.000	0.000	\$4.000		\$23,680.00
TOPSOIL, STRIP, SALVAGE+SPREAD									
Quantity Placed					Quantity Paid				
0250	2115-0100000	CY	75.000		75.000	0.000	\$60.000		\$4,500.00
MODIFIED SUBBASE									
Quantity Placed					Quantity Paid				
0260	2123-7450000	STA	14.000		14.000	0.000	\$225.000		\$3,150.00

A history of the postings and payments made for any item can be found in the item's history. To view the Item History, click on the three blue lines on the left end of the line containing the desired bid item.

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount	
Section: 0001 - FM-C004(116)--55-04, Acct ID- 38373, ROADWAY ITEMS								
0010	2121-7425020	TON	2,461.550	2,461.550	3,503.690	\$31.300	\$77,046.52	
GRANULAR SHOULDERS, TYPE B								
Quantity Placed			100.0%	+42.3%	Quantity Paid			0.0%
0020	2214-5145150	SY	83,157.890	83,157.890	88,697.767	\$1.710	\$142,199.99	
PAVEMENT SCARIFICATION								
Quantity Placed			100.0%	+6.7%	Quantity Paid			0.0%
0030	2303-1042500	TON	8,146.030	8,146.030	8,131.100	\$56.240	\$458,132.73	
HOT MIX ASPHALT HIGH TRAFFIC, INTERMEDIATE COURSE, 1/2 IN. MIX								
Quantity Placed			99.8%		Quantity Paid			0.0%

In the pop-out box, click "History".

The screenshot displays a software interface for managing items. On the left is a vertical navigation menu with icons for 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS' (highlighted in red), 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', and 'CHANGE ORDERS'. The main area is titled 'Items' and contains a search bar and a table with columns: Line Number, Item ID, Unit, Original Quantity, Authorized Quantity, Quantity Placed, Unit Price, and Authorized Amount. The table lists four items, each with a description and progress bars for 'Quantity Placed' and 'Quantity Paid'. A context menu is open over the 'History' option for the third item (Line Number 0030).

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount	
0010	2121-7425020	TON	2,461.550	2,461.550	3,503.690	\$31.300	\$77,046.52	
GRANULAR SHOULDERS, TYPE B								
Quantity Placed			100.0%	+42.3%	Quantity Paid			0.0%
0020	2214-5145150	SY	83,157.890	83,157.890	88,697.767	\$1.710	\$142,199.99	
PAVEMENT SCARIFICATION								
Quantity Placed			100.0%	+6.7%	Quantity Paid			0.0%
0030	2303-1042500	TON	8,146.030	8,146.030	8,131.100	\$56.240	\$458,132.73	
HOT MIX ASPHALT HIGH TRAFFIC, INTERMEDIATE COURSE, 1/2 IN. MIX								
Quantity Placed			99.0%		Quantity Paid			0.0%
0040	2303-1043500	TON	7,625.090	7,625.090	7,755.500	\$56.950	\$434,248.88	
HOT MIX ASPHALT HIGH TRAFFIC, SURFACE COURSE, 1/2 IN. MIX, NO SPECIAL FRICTION REQUIREMENT								

The resulting screen will show a log of the postings and payments associated with the bid item.

ALL REPORTS
 DAILY ACTIVITIES
ITEMS
 MATERIALS
 STOCKPILES
 TIME LIMITS
 CHANGE ORDERS
 PUNCH LIST
 PAYMENTS
 CONTRACTORS
 FUNDING

Item History

Unit TON	Unit Price \$56.240
Complete? No	Quantity Paid 0.000
Original Quantity 8,146.030	Quantity Placed but not Paid 8,131.100
Authorized Quantity 8,146.030	Amount Paid \$0.00
Total Quantity Placed 8,131.100	Amount Placed but not Paid \$457,293.06
Quantity Remaining 14.930	Authorized Amount \$458,132.73
Pending Quantity 0.000	

Postings

Daily Report Date	Created By	Status	Quantity Placed	Amount Placed
07/31/2022	Nicole Stinn	Final	0.300	\$16.87
05/16/2022	Nicole Stinn	Final	8,130.800	\$457,276.19
Displaying all 2 postings			Totals:	\$457,293.06

Payments

End Date	Status	Payment Number	Placed Quantity	Overage Quantity	Quantity Withheld	Amount Paid
08/01/2022	Approved	2	0.300	0.000	0.000	\$16.88
05/17/2022	Approved	1	8,130.800	0.000	0.000	\$457,276.19
Displaying all 2 payments			Totals:	8,131.100		\$457,293.07

Help
Chat

7 - Materials

(Reserved for Future Instructions)

Reserved for future instructions on Materials Tab.

For Iowa DOT administered projects, do NOT use or enter any values for Materials at this time, except when necessary to limit payment on items. Refer to [Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#) section and the [Releasing Previously Limited Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#) section for further guidance on limiting and approving item quantity payments.

A. [Releasing Previously Limited Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#)

If all applicable certifications and payrolls were not obtained for all items posted in the Daily Report, or if payment needed to be withheld for anticipated liquidated damages, payment should have been limited on the affected bid item. However, once all applicable certifications and payrolls have been received, or once a change order has been executed to add a bid item for liquidated damages, full payment on an item's posted quantity needs to be made. If payment was limited according to the preferred option of entering a material shortage quantity on the Review Materials screen (refer to the [Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages](#) section), a material approval now needs to be entered to allow payment on that quantity.

To approve all or part of an item's quantity for payment, click on Materials in the left menu.

Description	Unit	Material ID	Quantity Approved	Quantity Used	Quantity Remaining	Insufficient Quantity
0000-0000001 PAYROLL	None	0000-0000001	0.000	156.780	0.000	156.780
0000-0000002 LIQUIDATED DAMAGES	None	0000-0000002	0.000	0.000	0.000	0.000
2102-5020010 OBLITERATE OLD ROADBED	STA	2102-5020010	0.000	0.000	0.000	0.000
2107-0890000 COMPACTING TRENCH BOTTOM	STA	2107-0890000	0.000	0.000	0.000	0.000
2121-7425020 GRANULAR SHOULDERS, TYPE B	TON	2121-7425020	0.000	0.000	0.000	0.000

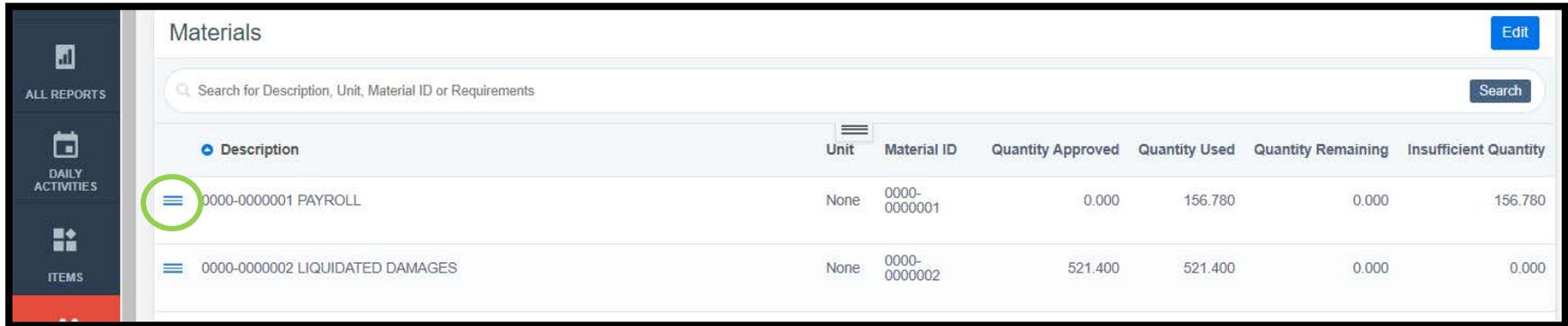
A list of the Materials associated to the project's bid items will display. If a shortage quantity was entered on the Daily Report's Review Materials screen, the shortage quantity will show in the "Quantity Used" column. If that shortage has not yet been approved, even in part, the full shortage quantity will display in the "Insufficient Quantity" column, and the "Quantity Approved" column will show 0.000. If the shortage quantity has been partially approved, the non-approved portion will display in the "Insufficient Quantity" column, and the approved portion will display in the "Quantity Approved" column. If a shortage quantity has been fully approved, the "Insufficient Quantity" column will show 0.000, and the "Quantity Approved" column will show the entire amount.

Description	Unit	Material ID	Quantity Approved	Quantity Used	Quantity Remaining	Insufficient Quantity
0000-0000001 PAYROLL	None		0.000	156.780	0.000	156.780
0000-0000002 LIQUIDATED DAMAGES			521.400	521.400	0.000	0.000
2102-5020010 OBLITERATE OLD ROADBED	STA	2102-5020010	0.000	0.000	0.000	0.000
2107-0890000 COMPACTING TRENCH BOTTOM	STA	2107-0890000	0.000	0.000	0.000	0.000
2121-7425020 GRANULAR SHOULDERS, TYPE B	TON	2121-7425020	0.000	0.000	0.000	0.000
2128-0000200 CONTRACTOR STOCKPILED SHOULDER MATERIAL	TON	2128-0000200	0.000	0.000	0.000	0.000
2214-5145150 PAVEMENT SCARIFICATION			75.000	150.000	0.000	75.000
2301-9091000 RUMBLE STRIP PANEL (PCC SURFACE)	EACH	2301-9091000	0.000	0.000	0.000	0.000

All Insufficient Quantities are being withheld (not picked up) from Payments. All values listed in the "Quantity Approved" column are being included in Payments. (If the "Quantity Used" shows 0.000, that item either has no quantity posted or was never limited and is therefore being fully paid.)

Approved Materials will get included in the payment after which a Material approval is entered even if they were withheld on a previous payment.

To approve a portion or all of the Insufficient Quantity for a Material, click on the three blue lines on the left side of the line containing the Material.



The screenshot shows a web interface for a 'Materials' table. On the left, there is a sidebar with navigation options: 'ALL REPORTS', 'DAILY ACTIVITIES', and 'ITEMS'. The main area contains a search bar and a table with columns: 'Description', 'Unit', 'Material ID', 'Quantity Approved', 'Quantity Used', 'Quantity Remaining', and 'Insufficient Quantity'. The first row is '0000-0000001 PAYROLL' with 0.000 approved, 156.780 used, 0.000 remaining, and 156.780 insufficient. The second row is '0000-0000002 LIQUIDATED DAMAGES' with 521.400 approved, 521.400 used, 0.000 remaining, and 0.000 insufficient. A green circle highlights the three horizontal blue lines (menu icon) to the left of the first row.

Description	Unit	Material ID	Quantity Approved	Quantity Used	Quantity Remaining	Insufficient Quantity
0000-0000001 PAYROLL	None	0000-0000001	0.000	156.780	0.000	156.780
0000-0000002 LIQUIDATED DAMAGES	None	0000-0000002	521.400	521.400	0.000	0.000

Then, click on "Approve" in the pop-up box.



This screenshot is similar to the first one, but a context menu is open over the first row. The menu has three options: 'Items' (with a red badge showing '39'), 'Approve' (with a red badge showing '0'), and 'History'. A green circle highlights the 'Approve' option. The table data remains the same as in the previous screenshot.

Description	Unit	Material ID	Quantity Approved	Quantity Used	Quantity Remaining	Insufficient Quantity
0000-0000001 PAYROLL	None	0000-0000001	0.000	156.780	0.000	156.780
0000-0000002 LIQUIDATED DAMAGES	None	0000-0000002	521.400	521.400	0.000	0.000

You will be brought to the Material Approvals screen. Click on the blue “Add” button near the top, right corner.

0000-0000001 PAYROLL None

Material Approvals

Description 0000-0000001 PAYROLL	Unit None
Material ID 0000-0000001	Requirements
Approved Quantity 0.000	Remaining Quantity 0.000
Used Quantity 156.780	Insufficient Quantity 156.780

! No approvals found. ×

Add

On the New approval screen, enter the “Approval Date” (date when certifications/payroll was received or liquidated damages were addressed by change order or other means) and the applicable “Form”. (If the “Form” list does not contain “Payrolls Received” or “Liquidated Damages Addressed”, they need to be added in the Reference Data. See subsection Overview of Lists in the [Appia Project Creation & Account Management Instructions](#)). Also enter the “Quantity” being approved. This is the quantity or portion of the quantity that was previously listed as a shortage on the Review Materials screen but now can be approved because all appropriate documentation is in place. The other fields are optional. When finished entering the approval information, click the blue “Save” button in either the upper, right corner or bottom, middle of the screen.

The screenshot shows a 'New' approval form with the following fields and values:

- Material Description:** 0000-0000001 PAYROLL
- Material Unit:** None
- Approved Quantity:** 0.000
- Remaining Quantity:** 0.000
- Used Quantity:** 156.780
- Insufficient Quantity:** 156.780
- * Approval Date:** 12/05/2024
- * Form:** Payrolls Received
- Supplier:** ** None Selected **
- Manufacturer:** ** None Selected **
- Lot:** (empty)
- Approved By:** (empty)
- * Quantity:** 96.840
- Remarks:** (empty)
- Made in America:** NO

Buttons: 'Save' (top right), 'Save' (bottom middle), 'Add Attachment' (bottom middle).

A green ribbon will appear across the top of the screen saying, "The material approval has been saved successfully. Add Another?", and the approval information will display.

The screenshot shows a software interface with a green notification banner at the top stating: "The material approval has been saved successfully. [Add Another?](#)". Below this is a blue banner with the text: "Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)".

The main content area displays the following information:

- Projects / 46-C046-085_8000ItemTest_3projects1contract / Materials / 0000-0000001 PAYROLL
- 46-C046-085_8000ItemTest_3projects1contract Under Construction
- STP-S-C046(85)--5E-46, FM-C046(86)--55-46, LFM-87--7X-46, Letting Date- March 19, 2024
- 0000-0000001 PAYROLL None

The "Material Approvals" section includes an "Add" button and the following details:

- Description:** 0000-0000001 PAYROLL
- Unit:** None
- Material ID:** 0000-0000001
- Requirements:**
- Remaining Quantity:** 0.000
- Insufficient Quantity:** 59.940
- Approved Quantity:** 96.840
- Used Quantity:** 156.780

A table below shows the approval details:

Date	Form	Supplier	Manufacturer	Lot	Approved By	Made in America	Quantity	
12/05/2024	Payrolls Received					No	96.840	 

Displaying 1 approval

96.840

To edit an approval entry, click on the blue circle with the pencil on the right end of the approval line, or to delete the approval, click on the red circle with the “x”. Additional approvals (approvals received on different dates) can be added using the blue “Add” button in the top, right corner.

The material approval has been saved successfully. [Add Another?](#)

Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)

Projects / 46-C046-085_8000ItemTest_3projects1contract / Materials / 0000-0000001 PAYROLL

46-C046-085_8000ItemTest_3projects1contract Under Construction
 STP-S-C046(85)--5E-46, FM-C046(86)--55-46, LFM-87--7X-46, Letting Date- March 19, 2024

0000-0000001 PAYROLL None

Material Approvals Add

Description 0000-0000001 PAYROLL	Unit None
Material ID 0000-0000001	Requirements
Approved Quantity 96.840	Remaining Quantity 0.000
Used Quantity 156.780	Insufficient Quantity 59.940

Date	Form	Supplier	Manufacturer	Lot	Approved By	Made in America	Quantity	
12/05/2024	Payrolls Received					No	96.840	✎ ✖
Displaying 1 approval							96.840	

B. Reserved for Future Use

Reserved for future use

8 - Stockpiles

A. Adding a Stockpile Item

The Stockpiles screen is where all stockpile additions and reductions are entered. As long as the correct prices and quantities are entered, stockpile payments and reductions will be processed at the appropriate unit rates. The stockpile quantity automatically reduces for an item when that item is incorporated into an Item Posting unless the user has specified a future date for stockpile recoveries.

To access the Stockpiles tab, click on “Stockpiles” in the left menu.

21-C021-153 Under Construction
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

Overview Edit

General Information

Project
Work Type
PCC OVERLAY

Location
On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38

Management
Prime Contractor

Awarded Amount \$
\$4,553,445.96

Authorized Amount ✓
\$4,580,158.96

Approved Changes ↗
\$26,713.00

Description

STP-S-C021(153)--5E-21, Acct ID- 38934,
FM-C021(154)--55-21, Acct ID- 38935,
Letting Date- November 15, 2022

Amount Paid

Amount

This will bring you to the Stockpiles screen. To add a new stockpile item, click on the blue “Add” button in the top, right corner of the screen. A separate stockpile entry is made for each bid item being stockpiled.

View if no stockpiles exist

The screenshot shows the 'Stockpiles' interface for project 21-C021-153, which is marked as 'Under Construction'. The page title is 'Stockpiles' and the status is 'Under Construction'. Below the title, there is a message: 'No stockpiles found.' A blue 'Add' button is circled in green in the top right corner. The left sidebar contains navigation options: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES (highlighted in red). The footer includes the Infotech logo, support hours (7:00 AM - 8:00 PM Eastern), phone number (888 352 2439), email (support@appia.net), and copyright information (Copyright © 2023, Infotech®. All rights reserved. Appia® is a registered trademark of Infotech. Terms / Privacy / DMCA).

View if stockpiles already exist

The screenshot shows the 'Stockpiles' interface with one stockpile entry. The 'Add' button in the top right corner is circled in green. The table below shows the stockpile details:

Stockpile	Fund Package	Value of Materials	Recovery	Remaining	
#1 2121-7425020 GRANULAR SHOULDERS, TYPE B	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	\$140,000.00	\$0.00	\$140,000.00	 

Below the table, there is a 'Recovery Progress' section with a progress bar showing 0.0% completion. At the bottom, it says 'Displaying 1 stockpile'.

A screen will appear in which the new stockpile information can be entered. Editable fields include “Item”, “Fund Package”, “Value of Materials”, “Quantity for Recovery”, “Begin Recovery On”, and “Description”. Some of the fields may not be editable immediately, but they will open up for editing as soon as the “Item” is chosen.

Do **NOT** hit the “Enter” key on the keyboard until you are done entering **ALL** data in this screen. If you do, it will save automatically, and you’ll have to try to enter adjustments to get the numbers to match your original intent.

The screenshot shows a web form titled "New" with a "Save" button and a "Cancel" button in the top right corner. The form contains several input fields:

- * Item**: A dropdown menu currently showing "** None Selected **".
- * Fund Package**: A dropdown menu currently showing "** None Selected **".
- * Value of Materials**: A text input field.
- * Quantity for Recovery**: A text input field.
- Recovery Rate**: A text input field.
- * Begin Recovery On**: A date input field showing "02/23/2023".
- Description**: A text input field.

On the right side of the form, there is a message: "Please select an item and a fund package." Above this message are two faint, overlapping rectangular boxes, possibly representing a list of items or fund packages.

Item: The Item field is a pull-down box. Choose the item to be stockpiled. If the project contains multiple sections, make sure you scroll through the items to select the item from the correct section.

The screenshot shows a web form titled "New" with a "Save" button and a "Cancel" button in the top right corner. The form contains several fields:

- * Item:** A dropdown menu currently showing "** None Selected **". The menu is open, displaying a list of items. "Section 0001" is circled in green. Below it, "0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B" is also circled in green. Other items include "0010: 2110-3825010 GRANULAR MATERIAL", "0030: 2214-5145150 PAVEMENT SCARIFICATION", and "0040: 2301-0690220 BRIDGE APPROACH, SECONDARY".
- Recovery Rate:** A section with the label "Recovery Rate".
- * Begin Recovery On:** A date field containing "02/23/2023".
- Description:** A text input field.

On the right side of the form, there is a faint, semi-transparent image of a document and a message that reads: "Please select an item and a fund package."

Fund Package: Select the Fund Package associated with the chosen item.

New Save Cancel

* Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
* Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
* Value of Materials \$312,858.00	Quantity Paid 0.000	Stockpiled Amount \$0.00
* Quantity for Recovery 9,550.000	Quantity Available 9,550.000	Amount Available \$312,858.00
Recovery Rate \$32.760	Unit TON	
* Begin Recovery On 02/23/2023	Unit Price \$32.760	
Description		

Value of Materials: The Value of Materials field will automatically populate with the extended (total) contract price for the selected bid item as soon as the Item is chosen. **Override this value.** The value you will enter is the invoice cost that the contractor must provide to you for the quantity of materials actually being stockpiled. This invoice cost needs to be factored at 100% (actual invoice cost) if the materials are stored on-site or 90% of the invoice cost if the materials are stockpiled offsite, according to [I.M. 6.000, Attachment D](#), section 2.51.

New Save Cancel

* Item	0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity	9,550.000	Extension	\$312,858.00
* Fund Package	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed	0.000	Amount Paid	\$0.00
* Value of Materials	<input type="text" value="\$140,000.00"/>	Quantity Paid	0.000	Stockpiled Amount	\$0.00
* Quantity for Recovery	<input type="text" value="9,550.000"/>	Quantity Available	9,550.000	Amount Available	\$312,858.00
Recovery Rate	\$14.660	Unit	TON	Unit Price	\$32.760
* Begin Recovery On	<input type="text" value="02/23/2023"/>				
Description	<input type="text"/>				

Quantity for Recovery: The Quantity for Recovery is the quantity of materials being put into the stockpile or that are in the stockpile. The Quantity for Recovery field will automatically populate with the contract quantity or the quantity already posted in Item Postings for the selected bid item as soon as the Item is chosen. **Override this value.** The value you will enter is the actual quantity of the bid item material that is being stockpiled.

New Save Cancel

* Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
* Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
* Value of Materials \$140,000.00	Quantity Paid 0.000	Stockpiled Amount \$0.00
* Quantity for Recovery 7,060.000	Quantity Available 9,550.000	Amount Available \$312,858.00
Recovery Rate \$19.830	Unit TON	
* Begin Recovery On 02/23/2023	Unit Price \$32.760	
Description		

Recovery Rate: The Recovery Rate will automatically calculate based on the Value of Materials and Quantity for Recovery entries. It is the Value of Materials divided by the Quantity for Recovery. The Recovery Rate should be less than the Unit Price of the bid item. This is because stockpile payments are for material costs only, and bid item unit prices include materials, labor, and overhead costs. Double check the Recovery Rate against the Unit Price (shown to the right of the Recovery Rate line) to make sure the Recovery Rate is less.

New
Save Cancel

<p>* Item</p> <div style="border: 1px solid #ccc; padding: 2px;">0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B</div> <p>* Fund Package</p> <div style="border: 1px solid #ccc; padding: 2px;">21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153</div> <p>* Value of Materials</p> <div style="border: 1px solid #ccc; padding: 2px; text-align: right;">\$140,000.00</div> <p>* Quantity for Recovery</p> <div style="border: 1px solid #ccc; padding: 2px; text-align: right;">7,060.000</div> <p>Recovery Rate</p> <div style="border: 1px solid #ccc; padding: 2px; text-align: right;">\$19.830</div> <p>* Begin Recovery On</p> <div style="border: 1px solid #ccc; padding: 2px;">02/23/2023</div> <p>Description</p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p>Authorized Quantity</p> <p>9,550.000</p> <p>Quantity Placed</p> <p>0.000</p> <p>Quantity Paid</p> <p>0.000</p> <p>Quantity Available</p> <p>9,550.000</p> <p>Unit</p> <p>TON</p> <p>Unit Price</p> <div style="border: 1px solid #ccc; padding: 2px; text-align: right;">\$32.760</div>	<p>Extension</p> <p>\$312,858.00</p> <p>Amount Paid</p> <p>\$0.00</p> <p>Stockpiled Amount</p> <p>\$0.00</p> <p>Amount Available</p> <p>\$312,858.00</p>
--	--	--

Begin Recovery On: This is the earliest date on which the stockpile payment can be reduced (the earliest date when you can begin recovering the funds advanced to the contractor). Generally, this date is/should be left as the day of creation of the stockpile. However, if there is some reason you want to be able to incorporate a bid item’s material into a project and pay for the bid item without reducing the stockpile, this field could be set for a future date.

Description: Enter a description here, if desired.

Once all of the necessary and pertinent information has been entered into the editable fields, and once the Recovery Rate has been checked against the Unit Price, click the blue “Save” button in the top, right corner to save the stockpile information and place the stockpile “into service”.

New [Save](#) [Cancel](#)

* Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
* Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
* Value of Materials \$140,000.00	Quantity Paid 0.000	Stockpiled Amount \$0.00
* Quantity for Recovery 7,060.000	Quantity Available 9,550.000	Amount Available \$312,858.00
Recovery Rate \$19.830	Unit TON	
* Begin Recovery On 02/23/2023	Unit Price \$32.760	
Description		

You will be returned to a Stockpile screen containing summary information for the stockpile just created.

Stockpile

Edit

Stockpile
#1

Associated Item
0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

Associated Fund Package
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

Recovery Rate
\$19.830 per item unit (TON)

Value of Materials
\$140,000.00

Recovered Amount
\$0.00

Remaining Value
\$140,000.00

Begin Recovery On
02/23/2023

Description

Events

Date	Action	Quantity Change	Value Change	Quantity Remaining	Value Remaining
02/23/2023	Created	7,060.000	\$140,000.00	7,060.000	\$140,000.00

Begin Recovery On: 02/23/2023.

? Help

⋮

To return to the main stockpile screen where all stockpiles are listed, either click on “Stockpiles” in the left menu or use the navigation path at the top to select “Stockpiles”.

Projects / 21-C021-153 / **Stockpiles** / Stockpile #1

21-C021-153 Under Construction
 STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Stockpile Edit

Stockpile #1 **Begin Recovery On** 02/23/2023

Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B **Description**

Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

Recovery Rate \$19.830 per item unit (TON)

Value of Materials \$140,000.00

Recovered Amount \$0.00

Remaining Value \$140,000.00

The main Stockpile screen will show all of the stockpiles that have been created.

Stockpiles Add

Stockpile	Fund Package	Value of Materials	Recovery	Remaining
#1 2121-7425020 GRANULAR SHOULDERS, TYPE B	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	\$140,000.00	\$0.00	\$140,000.00

Recovery Progress
 0.0%

Displaying 1 stockpile

B. Editing an Existing Stockpile

As long as the correct prices and quantities are entered, stockpile payments and reductions will be processed at the appropriate unit rates. Stockpiles should not be edited just to make a reduction when the bid item is incorporated into the project. The stockpile quantity automatically reduces for an item when that item is incorporated into an Item Posting unless the user has specified a future date for stockpile recoveries. Stockpiles should only be edited if changes need to be made to the original stockpile material prices or if additional quantity is being added to the stockpile.

To access the Stockpiles tab, click on “Stockpiles” in the left menu.

21-C021-153 Under Construction
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Overview Edit

General Information

Project
Work Type
PCC OVERLAY

Location
On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38

Management
Prime Contractor

Awarded Amount \$
\$4,553,445.96

Authorized Amount ✓
\$4,580,158.96

Approved Changes ↗
\$26,713.00

Description
STP-S-C021(153)--5E-21, Acct ID- 38934,
FM-C021(154)--55-21, Acct ID- 38935,
Letting Date- November 15, 2022

Amount Paid

Amount

This will bring you to the Stockpiles screen. To edit an existing stockpile entry, click on the blue circle with the pencil on the right end of the line containing the stockpile information.

The screenshot shows the 'Stockpiles' screen with a table containing one entry. The entry is '#1 2121-7425020 GRANULAR SHOULDERS, TYPE B' with a 'Fund Package' of '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153', a 'Value of Materials' of '\$140,000.00', 'Recovery' of '\$0.00', and 'Remaining' of '\$140,000.00'. A blue pencil icon in a circle is circled in green on the right side of the table row. Below the table is a 'Recovery Progress' bar at 0.0%. An 'Add' button is in the top right corner.

Stockpile	Fund Package	Value of Materials	Recovery	Remaining
#1 2121-7425020 GRANULAR SHOULDERS, TYPE B	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	\$140,000.00	\$0.00	\$140,000.00

Alternately, click on the blue text on the left end of the stockpile line. Then click the blue "Edit" button in the top, right corner on the next screen.

This screenshot is identical to the previous one, but the blue text '#1 2121-7425020' at the start of the table row is circled in green.

The screenshot shows the 'Stockpile' detail screen. It displays the stockpile ID '#1', the 'Associated Item' '0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B', and the 'Associated Fund Package' '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153'. On the right side, there is a 'Begin Recovery On' date of '02/23/2023' and a 'Description' field. A blue 'Edit' button in the top right corner is circled in green.

The screen that opens contains editable fields: “Value Change”, “Quantity Change”, “Begin Recovery On”, “Adjustment Effective Date”, and “Notes”.

Edit

Save Cancel

Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
Current Value of Materials \$140,000.00	Quantity Paid 0.000	Stockpiled Amount \$140,000.00
Current Quantity for Recovery 7,060.000	Quantity Available 9,550.000	Amount Available \$312,858.00
* Value Change <input type="text" value="\$0.00"/>	Unit TON	
* Quantity Change <input type="text" value="0.000"/>	Unit Price \$32.760	
* Begin Recovery On <input type="text" value="02/23/2023"/>		
* Adjustment Effective Date <input type="text" value="02/23/2023"/>		
New Value of Materials \$140,000.00		
New Quantity for Recovery 7,060.000		
Current Recovery Rate \$19.830		
New Recovery Rate \$19.830		

Help Chat

Value Change: Enter the change in the invoice price of the materials being stockpiled. This value may be positive or negative.

Edit

Save Cancel

Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
Current Value of Materials \$140,000.00	Quantity Paid 0.000	Stockpiled Amount \$140,000.00
Current Quantity for Recovery 7,060.000	Quantity Available 9,550.000	Amount Available \$312,858.00
* Value Change <input type="text" value="-10,000.00"/>	Unit TON	
* Quantity Change <input type="text" value="0.000"/>	Unit Price \$32.760	
* Begin Recovery On <input type="text" value="02/23/2023"/>		
* Adjustment Effective Date <input type="text" value="02/23/2023"/>		
New Value of Materials \$130,000.00		
New Quantity for Recovery 7,060.000		
Current Recovery Rate \$19.830		
New Recovery Rate \$18.414		

Help Chat

Quantity Change: Enter the change in the quantity of the bid item that is being stockpiled.

Edit Save Cancel

Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
Current Value of Materials \$140,000.00	Quantity Paid 0.000	Stockpiled Amount \$140,000.00
Current Quantity for Recovery 7,060.000	Quantity Available 9,550.000	Amount Available \$312,858.00
* Value Change <input type="text" value="-\$10,000.00"/>	Unit TON	
* Quantity Change <input type="text" value="5.000"/>	Unit Price \$32.760	
* Begin Recovery On <input type="text" value="02/23/2023"/>		
* Adjustment Effective Date <input type="text" value="02/23/2023"/>		
New Value of Materials \$130,000.00		
New Quantity for Recovery 7,065.000		
Current Recovery Rate \$19.830		
New Recovery Rate \$18.401		

Help Chat

New Value of Materials: This is the new value of the stockpiled materials. It is the original Value of Materials plus the Value Change.

New Quantity for Recovery: This is the new total quantity of the stockpiled materials. It is the original Quantity for Recovery plus the Quantity Change.

New Recovery Rate: The New Recovery Rate value will automatically calculate based on the values input in the Value Change and Quantity Change fields. The New Recovery Rate is the New Value of Materials divided by the New Quantity for Recovery. The New Recovery Rate should be less than the Unit Price of the bid item. This is because stockpile payments are for material costs only, and bid item unit prices include materials, labor, and overhead costs. Double check the New Recovery Rate against the Unit Price (shown to the right of the Recovery Rate line) to make sure the New Recovery Rate is less. Also double check the New Recovery Rate against the original Recovery Rate to make sure the adjustment seems appropriate.

Begin Recovery On: This is the earliest date in which the stockpile payment can be reduced (the earliest date when you can begin recovering the funds advanced to the contractor). Generally, this date is/should be left as the day of creation of the stockpile. However, if there is some reason you want to be able to incorporate a bid item's material into a project and pay for the bid item without reducing the stockpile, this field could be set for a future date.

Adjustment Effective Date: This is the date that changes to the stockpile recovery rate will become effective. You cannot enter a date in the past.

Notes: Enter a note here, if desired.

Add Attachment (button): Add an attachment, if desired. An example of an attachment would be the invoice for the materials.

View of bottom part of screen with remaining fields and "Add Attachment" button.

Recovery to Date
\$0.00

Recovery Remaining
\$140,000.00

Quantity Until Recovery
7,060.000

Stockpile Description

Notes

[Add Attachment](#)

Date	Action	Quantity Change	Value Change	Quantity Remaining	Value Remaining
02/23/2023	Created	7,060.000	\$140,000.00	7,060.000	\$140,000.00

Begin Recovery On: 02/23/2023.

[Help](#) 

Once all of the necessary and pertinent information has been entered into the editable fields, and once the New Recovery Rate has been checked against the Unit Price and original Recovery Rate, click the blue “Save” button in the top, right corner to save the stockpile information.

Edit

Save Cancel

Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Authorized Quantity 9,550.000	Extension \$312,858.00
Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Quantity Placed 0.000	Amount Paid \$0.00
Current Value of Materials \$140,000.00	Quantity Paid 0.000	Stockpiled Amount \$140,000.00
Current Quantity for Recovery 7,060.000	Quantity Available 9,550.000	Amount Available \$312,858.00
* Value Change <input type="text" value="-\$10,000.00"/>	Unit TON	
* Quantity Change <input type="text" value="5.000"/>	Unit Price \$32.760	
* Begin Recovery On <input type="text" value="02/23/2023"/>		
* Adjustment Effective Date <input type="text" value="02/23/2023"/>		
New Value of Materials \$130,000.00		
New Quantity for Recovery 7,065.000		
Current Recovery Rate \$19.830		
New Recovery Rate \$18.401		

Help Chat

You will be returned to a Stockpile screen containing summary information for the stockpile just created. The updated stockpile information will be displayed. A list of modifications (Events) is shown at the bottom.

Stockpile

Edit

Stockpile
#1

Associated Item
0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

Associated Fund Package
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

Recovery Rate
\$18.401 per item unit (TON)

Value of Materials
\$130,000.00

Recovered Amount
\$0.00

Remaining Value
\$130,000.00

Begin Recovery On
02/23/2023

Description

Events

Date	Action	Quantity Change	Value Change	Quantity Remaining	Value Remaining
02/23/2023	Created	7,060.000	\$140,000.00	7,060.000	\$140,000.00
Begin Recovery On: 02/23/2023.					
02/23/2023	Changed	5.000	-\$10,000.00	7,065.000	\$130,000.00
Effective Date: 02/23/2023. Value was changed from \$140,000.00 to \$130,000.00. Quantity was changed from 7,060.000 to 7,065.000.					

Displaying all 2 events

To return to the main stockpile screen where all stockpiles are listed, either click on “Stockpiles” in the left menu or use the navigation path at the top to select “Stockpiles”.

Projects / 21-C021-153 / **Stockpiles** / Stockpile #1

21-C021-153 Under Construction

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Stockpile Edit

Stockpile #1	Begin Recovery On 02/23/2023
Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Description
Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	
Recovery Rate \$18.401 per item unit (TON)	
Value of Materials \$130,000.00	
Recovered Amount \$0.00	
Remaining Value \$130,000.00	

The main Stockpile screen will show all of the stockpiles that have been created.

Stockpiles Add

Stockpile	Fund Package	Value of Materials	Recovery	Remaining	
#1 2121-7425020 GRANULAR SHOULDERS, TYPE B	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	\$130,000.00	\$0.00	\$130,000.00	✎ ✖

Recovery Progress

0.0%

Displaying 1 stockpile

9 - Time Limits

The Time Limits tab is where time charges (working day charges) are recorded. Weekly working day reports are generated based off of information input on this tab.

To access this section, click on the “Time Limits” button on the left menu.

The screenshot displays a software interface for project management. On the left is a vertical navigation menu with icons and labels: ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS (highlighted with a red circle), CHANGE ORDERS, and FORCE ACCOUNTS. The main content area is titled 'Projects / 75-C075-166' and shows details for a project labeled '75-C075-166' with a red 'Under Construction' tag. Below the project name is the text 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022'. The 'Overview' section includes a 'General Information' card with expandable sections for Project (Work Type: PCC PAVEMENT WIDENING / PCC RESURFACING), Location (On K 49, from C38 N 1 miles to 231 ft. north of 200th St; In the city of Le Mars, on K49 from 18th Street SE south to 774 ft. south of 200th St.), and Management (Prime Contractor: GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID., Created By: Douglas Heeren). To the right of the 'General Information' card are summary cards: 'Awarded Amount' (\$2,482,485.15), 'Authorized Amount' (\$2,482,485.15), and 'Approved Changes' (\$0.00). Below these is a 'Description' card with the same project details. At the bottom right is an 'Amount Paid' card showing 'Amount paid so far' as \$0.00, with three progress indicators: '0% of your Awarded' (\$2,482,485.15), '0% of your Authorized' (\$2,482,485.15), and '0%'.

You will be brought to the Time Limits screen. If there is only one time limit associated with the contract, there will only be one time limit shown on the screen (as shown in the screenshot below). If there are multiple time limits, multiple lines will show. To access the details for a specific time limit or to edit a time limit, select the blue description text of the desired limit.

Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)

Projects / 75-C075-166 / Time Limits

75-C075-166 Under Construction
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nove...

Time Limits

Time limit name	Type	Completed	Status	Days remaining
Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000	Working Days	0.0%	Not Started	95.0

Displaying 1 time limit

Now, a screen will appear with summary information for the specific time limit chosen.

The screenshot shows a software interface with a sidebar on the left containing navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, and a home icon. The main content area has a blue header with a warning icon and the text "Doing business as Iowa Local Systems _DEMO ACCOUNT. Switch to another business?". Below the header, the breadcrumb path is "Projects / 75-C075-166 / Time Limits / Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000". The project ID "75-C075-166" is displayed with a red "Under Construction" tag. Below this, a list of project identifiers is shown: "STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nove...". The "Time Limit" section features an "Edit" button and a "Cancel" button. A table below lists the time limit details:

Time Limit		
Primary		
Description	Type	Status
Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000	Working Days	Not Started
Original Days Allowed	Liquidated Damages/Day	Authorized Days Allowed
95.0	\$0.00	95.0

General information about time charges are displayed on this Time Limits screen. Informational fields shown include:

- **Description:** This will include the late start date or completion date and the liquidated damage value.
- **Type:** This is type of time limit(s) on the contract (i.e., Working Days, Calendar Days, Completion Date)
- **Status:** This is the status of the Time Limit (i.e., Not Started, In Progress, Completed)
- **Original Days Allowed:** Days allowed on the original contract.
- **Liquidated Damages/Day:** **If the project was let under DOT specifications, this field should show \$0.00.**
 - If there is a value in this field and the time limits on the contract are exceeded, Appia will automatically calculate the liquidated damages to be assessed for each overage day and will automatically deduct them from payments. This is NOT the way the Iowa DOT handles the assessment of liquidated damages. Rather the DOT requires that a change order be used to add an item for assessing liquidated damages. Therefore, in order to avoid the automatic calculation of damages and deduction of damages from payments, we enter a \$0.00 value in this field. Project set-up files generated by Local Systems will already have this value adjusted to \$0.00.
 - If Appia is being used for a project not using DOT specifications, the user can decide if they want to enter the liquidated damages in this field for automatic deduction on payments if time limits are exceeded.
- **Authorized Days Allowed:** Days allowed including any extensions of time limits added via change order.

A. Entering Time Charges

In order to edit/enter time charges (day charges), click on the blue “Edit” button on the right side of the screen.

Projects / 75-C075-166 / Time Limits / Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000

75-C075-166 Under Construction
STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nove...

Time Limit

Primary

Description Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000	Type Working Days	Status Not Started
Original Days Allowed 95.0	Liquidated Damages/Day \$0.00	Authorized Days Allowed 95.0

[Edit](#) [Cancel](#)

Clicking on the Edit button to edit time charges will bring you to this screen.

Edit

Working Days

Description
Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000

Start Date	Expected End Date
Days Charged 0.0	Liquidated Damages/Day \$0.00
Days Remaining 95.0	Liquidated Damages to Date \$0.00

Primary Deadline?
 YES

Work Completed?
 NO

< **January** >
2024

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

[Save](#) [Cancel](#)

Summary information is shown on left side of this screen. “Primary deadline” should be marked “Yes” unless the project has specific site times (phases) set up which are not on the critical path to completing the project and that specific site time is the one to which time charges are being made.

“Work Completed” should be marked “No” until the project has been finalized and retainage has been released. This toggle only needs to be switched to “Yes” when the user is ready to undergo Appia’s final payment process to complete a project and move it out of the “Under Construction” status to the “Completed” status. For guidance on whether or not to use Appia’s Final Payment process for the actual final payment, see the [Final Payment](#) section of these instructions, and for instructions on working through Appia’s final payment process, see the [Appia’s Final Payment Process – Including Balancing Change Order](#) and [Appia’s Final Payment Process – Without Balancing Change Order](#) sections of these instructions.

To enter a time charge for a day, click on the desired date on the calendar view.

Edit Save Cancel

Working Days

Description
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

Start Date 03/02/2021 **Expected End Date** 03/12/2021

Days Charged 8.5 **Liquidated Damages/Day** \$0.00

Days Remaining 131.5 **Liquidated Damages to Date** \$0.00

Primary Deadline? YES

Work Completed? NO

March 2021

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6
7	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 Full Day	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Note: No time charges can be entered on a date before the "Notice to Proceed" date or on dates in the future.

A data entry box will appear in place of the calendar view.

The screenshot displays the 'Edit' interface for 'Working Days'. The left sidebar includes navigation options: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area shows project details: Description (Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00), Start Date (03/02/2021), Expected End Date (03/12/2021), Days Charged (8.5), Liquidated Damages/Day (\$0.00), Days Remaining (131.5), Liquidated Damages to Date (\$0.00), Primary Deadline? (YES), and Work Completed? (NO). On the right, a calendar for March 2021 is shown with a date entry box for March 16, 2021. The date entry box contains a blue '+ Add Controlling Item' button, radio buttons for 'None', '1/2 Day', and 'Full Day', and a 'Contractor Working?' dialog with 'Yes' and 'No' options. A 'Remarks' text area and a 'Done' button are also visible.

In the data entry box enter the controlling item by clicking on the “Add Controlling Item” button. The controlling item is the item that is most controlling the progress of the work on the project on that date. In other words, select the item which is currently controlling the critical path. Clicking on the “Add Controlling Item” link will bring up a screen showing all bid items on the contract as shown below. Select the desired item.

When the item is selected, a green circle with a check mark will appear on the right side of the line. When you are satisfied that the correct item has been selected, click on the blue “Add Items” button at the bottom.

21-2912-601 Under Cont
BRS-SWAP-2912(601)-FF-21

Edit

Working Days

Description
Working Days, Late Start Date

Start Date
03/02/2021

Days Charged
8.5

Days Remaining
131.5

Primary Deadline?
Yes

Work Completed?
NO

Save Cancel

Add Item(s) to Section

Search for Item ID, Description and Unit Search

Item ID	Description	Unit
2101-0850001	CLEARING AND GRUBBING	ACRE
2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW	CY
2104-2710020	EXCAVATION, CLASS 10, CHANNEL	CY
2105-8425015	TOPSOIL, STRIP, SALVAGE AND SPREAD	CY
2110-3825010	GRANULAR MATERIAL	TON
2110-8200000	CONSTRUCTION OF SOIL AGGREGATE SUBBASE	MILE
2121-7425020	GRANULAR SHOULDERS, TYPE B	TON
2123-7450000	SHOULDER CONSTRUCTION, EARTH	STA
2214-5145150	PAVEMENT SCARIFICATION	SY

Add Items Cancel

Your selection should now be shown where the “Add Controlling Item” option was previously shown. If you chose the wrong item, click on the red circle with the “x” to the right of the item name and choose a different item.

Edit Save Cancel

Working Days

Description
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

Start Date 03/02/2021	Expected End Date 03/12/2021
Days Charged 8.5	Liquidated Damages/Day \$0.00
Days Remaining 131.5	Liquidated Damages to Date \$0.00

Primary Deadline?
 YES NO

Work Completed?
 YES NO

Remove March 2021

March 16, 2021

2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW	CY	<input checked="" type="radio"/>
--------------	--	----	----------------------------------

None **1/2 Day** **Full Day**

Contractor Working?
 Yes No

Remarks

Done

Next, for working day contracts, select the share of the day to be charged (None, ½ Day, Full Day) by clicking the appropriate radio button to the left of the time charge amount. Also, click the appropriate radio button to indicate whether the contractor was on site working or not.

Edit Save Cancel

Working Days

Description
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

Start Date 03/02/2021	Expected End Date 03/12/2021
Days Charged 8.5	Liquidated Damages/Day \$0.00
Days Remaining 131.5	Liquidated Damages to Date \$0.00

Primary Deadline?
 YES NO

Work Completed?
 YES NO

Remove March 2021

March 16, 2021

2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY ✕

None 1/2 Day Full Day

Contractor Working?
 Yes No

Remarks

Done

Last, enter a remark. The remarks section should **always be filled out for days with 0 or ½ day charges**. For those days with 0 or ½ day charges, a **“Reason for Delay”** must be shown in the remarks field. Additional information can be added as well if desired. **Failure to enter a remark on days with zero charges (None) will cause the recording of the day to be omitted from the Time Limit (Weekly Working Day) Report.**

The screenshot displays a software interface for editing a 'Working Days' entry. The interface includes a sidebar with navigation options such as 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', and 'TIME LIMITS'. The main area is titled 'Edit' and contains a form with the following fields:

- Description:** Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00
- Start Date:** 03/02/2021
- Expected End Date:** 03/12/2021
- Days Charged:** 8.5
- Liquidated Damages/Day:** \$0.00
- Days Remaining:** 131.5
- Liquidated Damages to Date:** \$0.00
- Primary Deadline?:** YES (toggle)
- Work Completed?:** NO (toggle)

A calendar view for March 2021 is displayed, showing a selected date of March 16, 2021. The calendar entry for March 16, 2021, is highlighted and shows the text '2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY'. Below the calendar, there are radio buttons for 'None', '1/2 Day', and 'Full Day', and a 'Contractor Working?' section with 'Yes' and 'No' options. A 'Remarks' field is circled in green and contains the text 'Reason for Delay: Free Winter Work'. A 'Done' button is located at the bottom right of the calendar view.

“Reason for Delay” remarks should always be entered for Saturdays and Sundays as well when no day has been charged. In those cases, the “Reason for Delay” can be listed as “Weekend” or “Saturday”/ “Sunday”.

When you are done entering the charge for the day, click the gray “Done” button.

Edit Save Cancel

Working Days

Description
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

Start Date 03/02/2021 **Expected End Date** 03/12/2021

Days Charged 8.5 **Liquidated Damages/Day** \$0.00

Days Remaining 131.5 **Liquidated Damages to Date** \$0.00

Primary Deadline? YES

Work Completed? NO

Calendar: March 2021

Remove **March 16, 2021**

2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY ✕

None **Contractor Working?** Yes No

1/2 Day

Full Day

Remarks
Reason for Delay: Free Winter Work

Done

This will return you to the calendar view. If a charge of either ½ day or full day was entered, the charge will show on the calendar. If “None” was selected for the day charge, no charge will appear on the calendar. However, if an entry was made in the “Remarks” section for a day, the calendar will show a notepad icon to indicate an entry was made.

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6
7	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 Full Day	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

***See next page before navigating away from the current screen.

When all time limit entries have been made, be sure to click the blue “Save” button in the top, right corner before navigating away from this screen. Failure to click the “Save” button will result in the loss of all time limit entries made while you were in the Time Limits tab.

Edit

Working Days

Description
Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

Start Date
03/02/2021

Expected End Date
03/12/2021

Days Charged
8.5

Liquidated Damages/Day
\$0.00

Days Remaining
131.5

Liquidated Damages to Date
\$0.00

Primary Deadline?
 YES NO

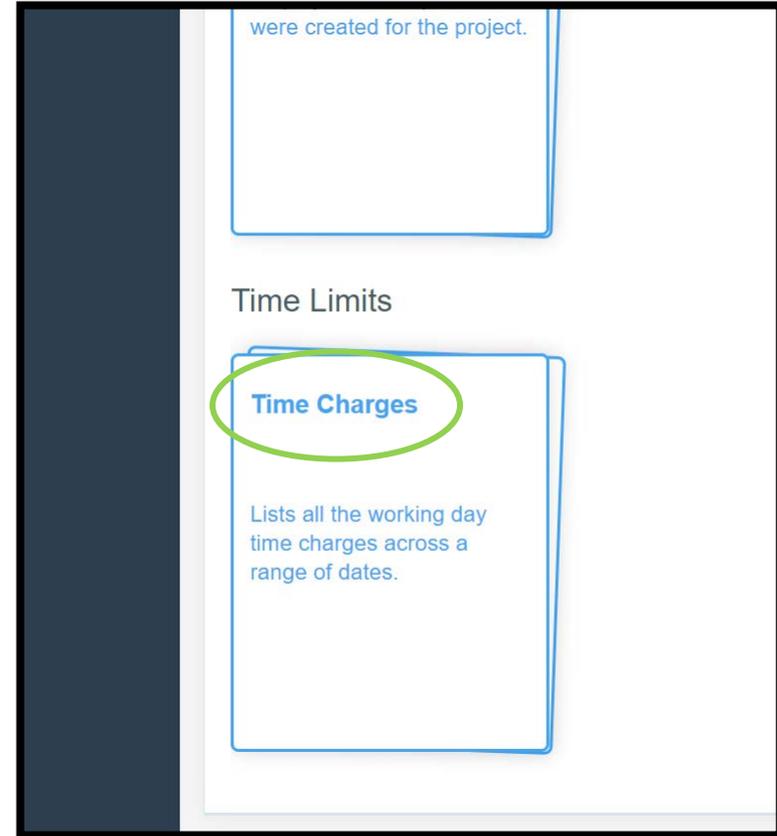
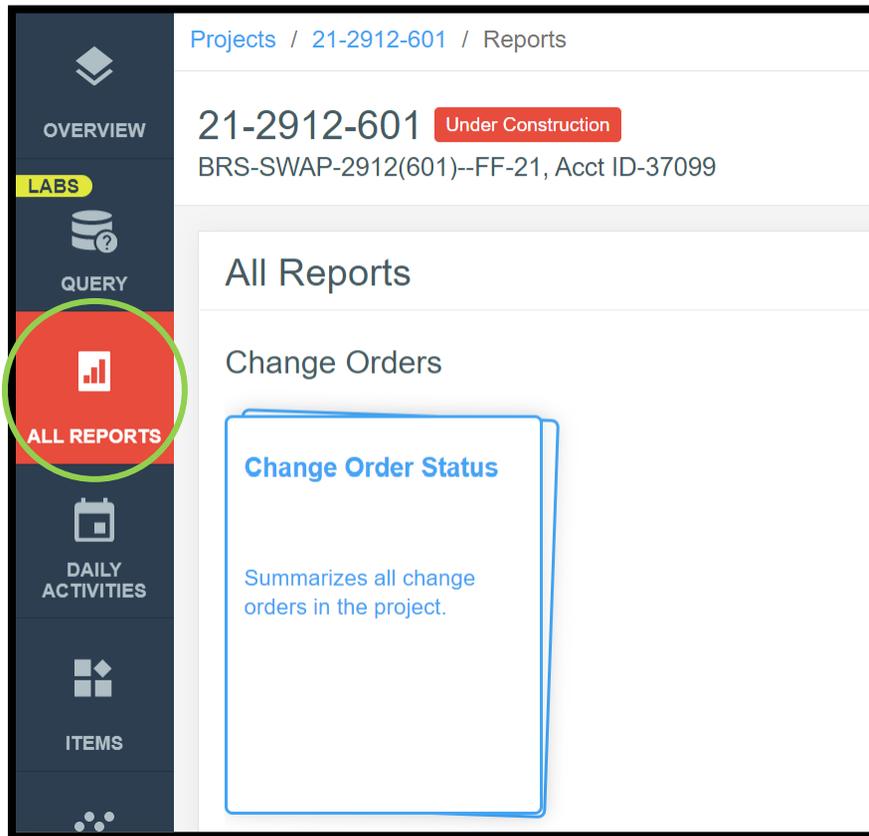
Work Completed?
 YES NO

March 2021

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6 Full Day
7 Full Day	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 Full Day	13 Full Day
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

B. Generating a Time Limit Report (Weekly Working Day Report)

To generate a Weekly Working Day Report, navigate to the All Reports tab on the left menu. Scroll down to find the “Time Charges” report. Click on the “Time Charges” report.



Clicking on the “Time Charges” Report will cause the following screen to appear.

On this screen, make sure you:

- Select the Start Date and End Date corresponding to the week for which you want to generate the report. The Start Date should be a Sunday, and the End Date should be a Saturday.
- Select “Yes” for Show Remarks.
 - Selecting yes will show any zero-charge day on the report which had an entry in the “Remarks” field as noted in the preceding section of these instructions.
- Select “Yes” for Show Contractor Working.
 - Selecting yes does not indicate that the contractor was working every day the report covers. Rather, it tells Appia to include the information for that field on the report. If marked yes, the report will show the individual entries you made for each date showing whether the contractor was working or not.

The screenshot shows the 'Time Charges' report configuration interface. On the left is a dark sidebar with icons for 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main area has a title 'Time Charges' and a 'Run Report' button in the top right. Below the title are two date input fields: '* Start Date' (03/07/2021) and '* End Date' (03/13/2021). To the right of these fields are two radio button options: 'Show Remarks?' (selected 'Yes') and 'Show Contractor Working?' (selected 'Yes').

When the appropriate dates have been entered and report choices marked, click on the blue “Run Report” button in the top, right corner.

This screenshot is identical to the previous one, showing the 'Time Charges' report configuration. The 'Run Report' button in the top right corner is now highlighted with a blue border, indicating it is the button to be clicked.

A new window will open in your internet browser with the generated report. This report can be downloaded and saved into the desired location. Once saved, it can be uploaded to Doc Express. (Depending on the browser you are using, this screen may look different.)

The screenshot shows a web browser window with the address bar displaying 'time_charges'. The browser interface includes a navigation menu on the left, a toolbar at the top with page number '1 / 2', zoom level '100%', and icons for print and refresh. The main content area displays a report header for 'IOWA DOT GETTING YOU THERE' and 'Iowa Local Systems DEMO ACCOUNT Time Charges for Working Days 21-2912-601'. Below the header is a table of project details. On the left side of the browser, there is a sidebar with two thumbnails labeled '1' and '2', representing different views or pages of the report.

Description	BRS-SWAP-2912(601)--FF-21, Acct ID-37099
Location	On B53 Over LITTLE SIOUX RIVER S25 T95 R36
Awarded Project Amount	\$2,218,553.45
Awarded Project % Complete	0.000%
Authorized Project Amount	\$2,218,553.45
Authorized Project % Complete	0.000%
Notice to Proceed Date	10/27/2020
Construction Start Date	
Prime Contractor	GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID. 5784 HIGHWAY 175 IDA GROVE, IA
Dates Covered	03/07/2021 to 03/13/2021
Time Complete To Date	8.5 Days (6.071%)
Time Complete In Period	5.0 Days (3.571%)
Total Authorized Days	140.0 Days
Total Days Remaining	131.5 Days

A sample report is shown here. Note that all remarks, controlling items, and contractor working choices are shown with each date's entry.

 Iowa Local Systems DEMO ACCOUNT Time Charges for Working Days 21-2912-601	
Description	BRS-SWAP-2912(601)--FF-21, Acct ID-37099
Location	On B53 Over LITTLE SIOUX RIVER S25 T95 R36
Awarded Project Amount	\$2,218,553.45
Awarded Project % Complete	0.000%
Authorized Project Amount	\$2,218,553.45
Authorized Project % Complete	0.000%
Notice to Proceed Date	10/27/2020
Construction Start Date	
Prime Contractor	GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID. 5784 HIGHWAY 175 IDA GROVE, IA
Dates Covered	03/07/2021 to 03/13/2021
Time Complete To Date	8.5 Days (6.071%)
Time Complete In Period	5.0 Days (3.571%)
Total Authorized Days	140.0 Days
Total Days Remaining	131.5 Days

Time Charges: 21-2912-601	04/06/2021 Page 1 of 2
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Time Limit: Working Days, Late Start Date 04/01/21, Liquidated Damages \$1,500.00

Sunday 03/07/2021 - Saturday 03/13/2021

Date	Day of the Week	Days Charged
03/07/2021	Sunday	0.0
Controlling Item: 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY		
Contractor Working: No		
Remarks: Reason for Delay: Weekend (Sunday)		
03/08/2021	Monday	1.0
Controlling Item: 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY		
Contractor Working: Yes		
Remarks: Reason for Delay: None		
03/09/2021	Tuesday	1.0
Controlling Item: 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY		
Contractor Working: Yes		
03/10/2021	Wednesday	1.0
Controlling Item: 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY		
Contractor Working: Yes		
03/11/2021	Thursday	1.0
Controlling Item: 2102-2710070 EXCAVATION, CLASS 10, ROADWAY AND BORROW CY		
Contractor Working: Yes		
03/12/2021	Friday	1.0
Controlling Item: 2501-0201057 PILES, STEEL, HP 10 X 57 LF		
Contractor Working: Yes		
03/13/2021	Saturday	0.0
Controlling Item: 2501-0201057 PILES, STEEL, HP 10 X 57 LF		
Contractor Working: No		
Remarks: Reason for Delay: Weekend		
Total This Period:		5.0
Total To Date:		8.5

Time Charges: 21-2912-601	04/06/2021 Page 2 of 2
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10 - Change Orders

The Change Order tab is where change orders are created and approved. Multiple change order drafts can be worked on concurrently.

To access the Change Orders section, click on the Change Order button in the left menu.

The screenshot shows a software interface with a dark sidebar on the left containing navigation options: MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS (highlighted in red), PUNCH LIST, and PAYMENTS. The main content area is divided into sections: Location (On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38), Management (Prime Contractor: CEDAR VALLEY CORP., LLC; Project Manager: Niki Stinn; Managing Office: Local Systems; Created By: Douglas Heeren), Letting Date (November 13, 2022), Amount Paid (Amount paid so far: \$0.00; 0% of your Awarded \$4,553,445.96; 0% of your Authorized \$4,553,445.96; 0% of your Approv Paymer \$0.00), Important Dates (Date Created: Dec 5, 2022; Notice to Proceed: Dec 20, 2022), and Progress (Time Complete: 0 Days; Time Remaining: 80 Days; 0% progress bar).

A. [General Change Order Information](#)

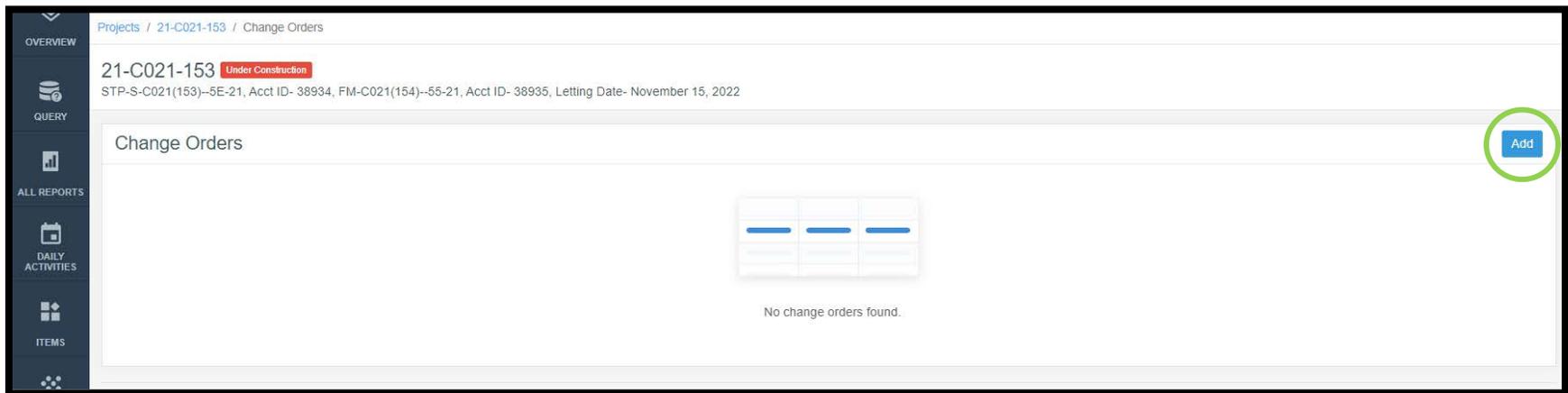
Clicking on the Change Order button in the left menu will bring you to this screen. If you have not yet created any change orders, a message saying “No change orders found” will display. Conversely, if you have already created a change order(s), it will be displayed on the screen.

Note: Before creating ANY change orders, ensure you have created the Change Order Custom Fields in your Reference Data, as required by Local Systems. For guidance on creating the custom fields, refer Section to 20, subsection B. Editing Lists in the [Appia Project Creation & Account Management Instructions](#).

Note: If multiple projects are tied in one contract, create a separate change order for each project.

Note: Refer to Section 13 (default settings) or Section 5 (project-specific settings) of the [Appia Project Creation & Account Management Instructions](#) for guidance on creating signature lines for change orders. For projects let through the Iowa DOT, do NOT have the Contractor, Project Engineer, or Person in Responsible Charge wet-sign a change order document. Those signatures must take place electronically in Doc Express.

To create a new change order, click the blue “Add” button in the top, right corner.



To edit an existing change order, click the blue circle with the pencil on the right end of the line containing the desired change order.

Date	Status	Amount	Type	Summary	No.
02/21/2023	Draft	\$249.95	Non-Significant - Federal-aid Participating		1

Clicking on either the “Add” or “Edit (pencil)” button will bring you to the screen shown below. (The “Edit” screen will include tabs across the top: “Overview”, “Quantities”, “New Items”, “Time Limit Changes”, “New Time Limits”, and “Attachments”.)

New Save Cancel

Change Order Type: **** None Selected ****

Summary:

Description:

B - Reason for change:

Note: The Change Order Custom Fields are fields B through E.

B. [Change Order Descriptive Information Screen \(Initial Creation\) / Overview Tab \(Edit Mode\)](#)

In this screen pictured above, there are multiple fields of information that need to be populated. Refer to [I.M. 6.000, Attachment D](#), section 2.36 for more complete guidance on change orders.

- Change Order Type: This is a pull-down menu that allows you to select type of change order applicable to the situation.
 - Refer to [I.M. 6.000, Attachment D](#), section 2.36 to determine Significant/Non-Significant (Substantial/Non-Substantial) status.
 - Refer to the Final Highway Funding Sources document found the Contract Documents Drawer in Doc Express to determine Participating/Non-Participating status. If you are unsure, please contact your Local Systems Field Technician.
 - When both participating and non-participating items are included on the change order, choose a Participating type.
 - When a non-participating item is included on a change order, before going any further, ensure that a non-participating funding package exists. If a non-participating funding package is not present, add one. Refer to Section 4 of the [Appia Project Creation & Account Management Instructions](#) for guidance on creating funding packages.
 - Current choices for change order types include:
 - Non-significant – Federal-Aid Participating
 - Non-significant – Non-Participating
 - Non-significant – Swap Participating
 - Significant – Federal-aid Participating
 - Significant – Non-Participating
 - Significant – Swap Participating



The screenshot shows a software interface for creating a new change order. On the left is a dark sidebar with navigation options: 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main area is titled 'New' and contains a 'Change Order Type' dropdown menu with the text '** None Selected **'. Below this is a 'Description' field with a rich text editor toolbar showing options for font size (14px), bold (B), italic (I), underline (U), and other text formatting tools. A green oval highlights the 'Change Order Type' dropdown menu.

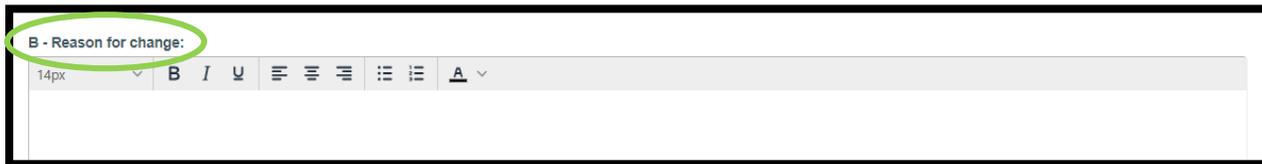
- Summary: This field may be left blank.

A screenshot of a text input field with a black border. The word "Summary" is written in the top-left corner of the field and is circled in green. The rest of the field is empty.

- Description: Enter a description of the modification to be made.
 - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section A of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.
 - Check the contract to verify contract item line numbers. For existing items, use the original line number, not a 7000 number.
 - Look at any previous change orders to check 8000 line numbers for any previously added new items. Continue numbering sequentially, starting at 8001. If there are multiple projects included in the contract, each project should add new items starting at 8001 but should include an alphabetical supplement to the number (example: 8001a, 8001b, etc.)

A screenshot of a rich text editor field with a black border. The word "Description" is written in the top-left corner and is circled in green. Below the label is a toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, and link. The main text area is empty.

- B – Reason for change: Enter a description of the reason for the modification(s) to the contract.
 - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section B of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.

A screenshot of a rich text editor field with a black border. The text "B - Reason for change:" is written in the top-left corner and is circled in green. Below the label is a toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, and link. The main text area is empty.

- C – Settlement of cost(s) of change as follows with items addressed in Sections F and/or G: Explain the payment method associated with the modification(s) (ex. Contract Unit Price, Agreed Unit Price, Agreed Lump sum, Force Account, Specified Rate, Mutual Benefit).
 - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section C of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.



C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:

14px

A rich text editor interface with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and text alignment. The text "C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:" is highlighted with a green oval.

- D – Justification for cost(s): Provide rationale/justification for accepting the proposed costs associated with the modification(s).
 - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section D of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.



D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):

14px

A rich text editor interface with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and text alignment. The text "D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):" is highlighted with a green oval.

- E – Contract time adjustment: Provide an explanation of the impact of the proposed modification to the contract’s time limits. Also, explain how the time adjustments, if applicable, were determined.
 - Choices for impacts are:
 - No Working Days Added
 - Working Days Added
 - Unknown at this time – This option should be avoided unless impacts to time cannot be quantified until after the work is complete.
 - Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section E of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection.

E - Contract time adjustment:

14px B I U [align icons] [list icons] A

When information has been entered in all of the fields, click the blue “Save” button in the top, right corner.

Projects / 21-C021-153 / Change Orders / New

21-C021-153 Under Construction
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

New Save Cancel

Change Order Type: Non-Significant - Federal-aid Participating

Summary: [empty field]

Description: 14px B I U [align icons] [list icons] A
Appia Instructions

After clicking the “Save” button, you will be directed to the screen shown below. At the top, the descriptive information entered on the previous screen is displayed. This view shows the current status of the change order. At the bottom, numerical values for change order modifications are entered.

Projects / 21-C021-153 / Change Orders / Change Order #1

21-C021-153 Under Construction Submit For Approval Actions Reports

STP-S-C021(153)--SE-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Change Order Edit

Date Created
02/21/2023

Summary

Description
Appia Instructions

B - Reason for change:
Appia Instructions

C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:
Appia Instructions

D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):
Appia Instructions

E - Contract time adjustment:
Appia Instructions

Status
Draft

Type
Non-Significant - Federal-aid Participating

Total Proposed Amount
\$0.00

← Information added on previous screen

Quantity Changes Edit

No quantity changes found

C. Creating an Auto-Populated Balancing Change Order Using a Standard Change Order

To create a balancing change order from a standard change order (not a balancing change order created as part of the final payment process), within the change order, click on the gray “Actions” button near the upper, right corner, and select “Balance All Items”.

Projects / 08-C008-079 / Change Orders / Change Order #2

08-C008-079 Under Construction Submit For Approval Actions Reports

BROS-SWAP-C008(79)--SE-08 - 36477 Letting Date: January 22, 2020

Change Order Edit

Date Created 08/28/2023	Status Draft
Summary	Type
Description	Total Proposed Amount \$0.00

Quantity Changes Edit

! No quantity changes found. x

The changed quantities will automatically be generated for all affected items. Changes are shown in the Quantity Changes section.

Change Order

Edit

Date Created
08/28/2023

Summary

Description

Status
Draft

Type

Total Proposed Amount
-\$438,744.09

Quantity Changes

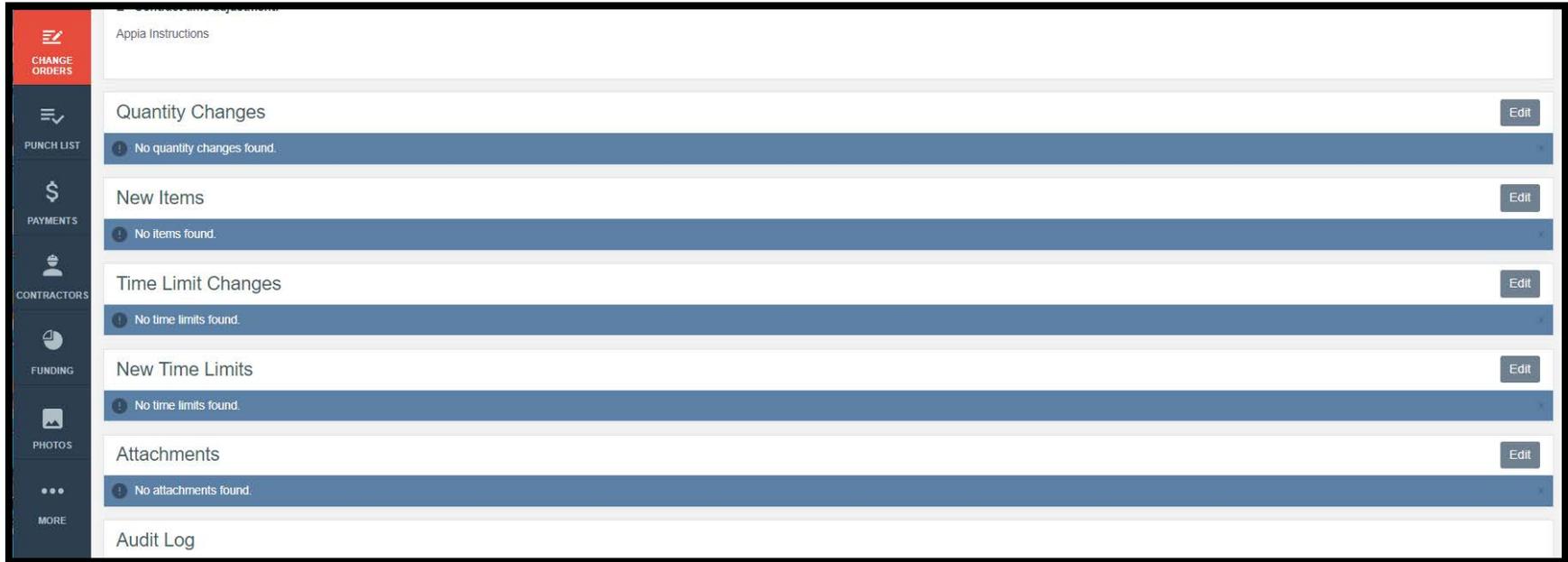
Edit

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
Section: 0001 - Roadway Items							
0010	2102-2625000	CY	3,786.000	-3,786.000	0.000	\$14.000	-\$53,004.00
EMBANKMENT-IN-PLACE							
Reason: Balancing Change Order							
	SWAP - COUNTY SWAP - COUNTY		3,786.000	-3,786.000	0.000	\$14.000	-\$53,004.00
0020	2102-2710070	CY	1,043.000	-300.407	742.593	\$5.000	-\$1,502.04
EXCAVATION, CLASS 10, ROADWAY AND BORROW							
Reason: Balancing Change Order							
	SWAP - COUNTY SWAP - COUNTY		1,043.000	-300.407	742.593	\$5.000	-\$1,502.04
0030	2104-2710020	CY	50.000	-50.000	0.000	\$5.000	-\$250.00
EXCAVATION, CLASS 10, CHANNEL							
Reason: Balancing Change Order							

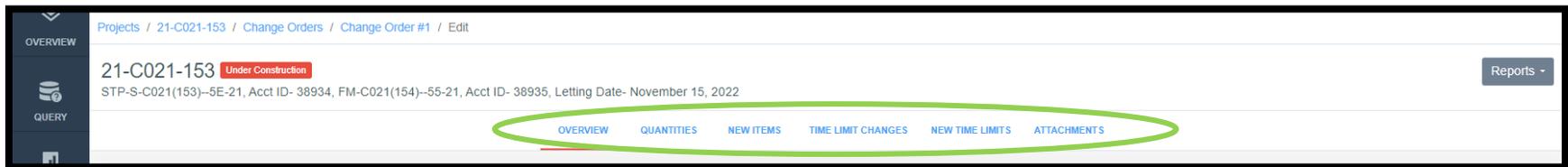
The “Balance All Items” option can be re-selected as many times as needed to refresh quantities if item quantities change while the change order is still in draft status.

D. Numerical Values Change Order Entry Screen

Below the descriptive information are options for “Quantity Changes”, “New Items”, “Time Limit Changes”, “New Time Limits”, and “Attachments”. Each of these options is detailed below. (If editing an existing change order, these options will be listed in tabs near the top of the screen.)

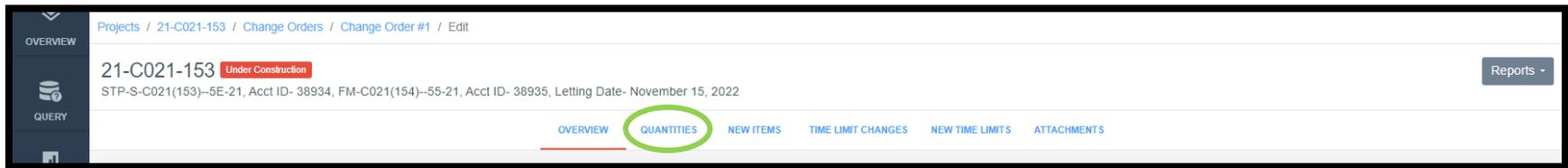


View of tabs in edit mode

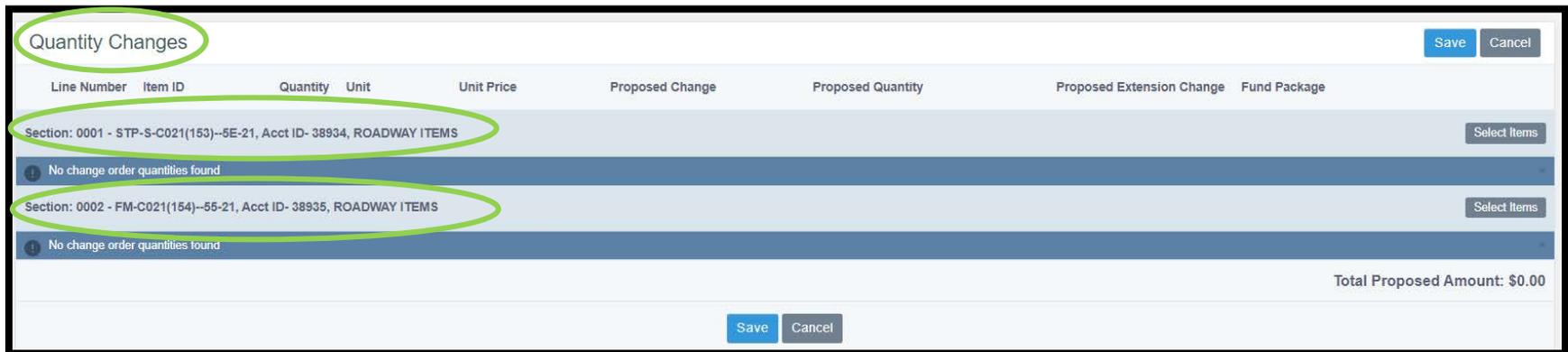


1) Quantity Changes / Quantities Tab (Edit Mode)

Use Quantity Changes when making a change to an existing contract item. To enter a quantity change, click the gray “Edit” button on the right end of the Quantity Changes line. (If in edit mode, click on the “Quantities” tab near the top, center of the screen.)



This will bring you to the Quantity Changes data entry screen. If there are multiple sections in your Appia project (different tied projects in the contract or different divisions within a contract), you will see lines for each independent section as shown below. If only one section is present on the contract, only one section will be displayed.



To select the item(s) that is being modified in the change order, click the gray “Select Items” button on the right end of the line. For Appia projects with multiple sections, be sure to click the “Select Items” button on the line that corresponds with the section containing the already-existing item. You may add items to each section within the same change order if needed. You may add items to multiples sections within the same change order if needed only if the sections are divisions under one project number (accounting ID). Do NOT add items to multiple sections in one change order if the sections represent separate projects tied together in one contract (separate accounting IDs).

The screenshot displays a web interface titled "Quantity Changes" with a table of sections. The table has columns for Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. Two sections are visible, each with a "Select Items" button circled in green. The first section is "0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS" and the second is "0002 - FM-C021(154)--5E-21, Acct ID- 38935, ROADWAY ITEMS". Both sections show a message: "No change order quantities found". At the bottom right, it says "Total Proposed Amount: \$0.00". There are "Save" and "Cancel" buttons at the top right and bottom center.

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS								
No change order quantities found								
Section: 0002 - FM-C021(154)--5E-21, Acct ID- 38935, ROADWAY ITEMS								
No change order quantities found								

Total Proposed Amount: \$0.00

When "Select Items" is chosen, the window shown below will pop up. It contains a list of the items in that section already existing in the contract. You can search for a particular item in the search bar, or you can use the scroll bar on the right side (or scroll with your mouse) to scroll through the items. If there are many items on the contract, there may be multiple pages of items. An option to navigate to another page can be found by scrolling to the very bottom of the list. To select an item, simply click on the line containing the item's information.

Change Project Items

Search for Line Number, Item ID, Description and Unit Search

Line Number	Item ID	Description	Unit	Authorized	Placed	Remaining
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS						
0010	2110-3825010	GRANULAR MATERIAL	TON	760.000	0.000	760.000
0020	2121-7425020	GRANULAR SHOULDERS, TYPE B	TON	9,550.000	0.000	9,550.000
0030	2214-5145150	PAVEMENT SCARIFICATION	SY	74,947.000	0.000	74,947.000
0040	2301-0690220	BRIDGE APPROACH, SECONDARY ROADS	SY	97.800	0.000	97.800
0050	2301-1032090	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 9 IN.	SY	2,813.000	0.000	2,813.000
0060	2301-9091000	RUMBLE STRIP PANEL (PCC SURFACE)	EACH	6.000	0.000	6.000
0070	2310-5151040	PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY	CY	12,491.000	0.000	12,491.000
	2310-	PORTLAND CEMENT CONCRETE OVERLAY				

0 Item(s) Add Items Cancel

To select a particular item, simply click on the line containing the item’s information. Once selected, a green circle with a check mark will appear on the right end of the line. Select all desired items. If an item is selected by mistake, simply click the line containing the item’s information again, and the green circle will disappear. When all desired items have been selected, click the blue “Add Items” button in the bottom, right corner of the window.

Change Project Items

Search for Line Number, Item ID, Description and Unit Search

Line Number	Item ID	Description	Unit	Authorized	Placed	Remaining	
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS							
0010	2110-3825010	GRANULAR MATERIAL	TON	760.000	0.000	760.000	
0020	2121-7425020	GRANULAR SHOULDERS, TYPE B	TON	9,550.000	0.000	9,550.000	
0030	2214-5145150	PAVEMENT SCARIFICATION	SY	74,947.000	0.000	74,947.000	✓
0040	2301-0690220	BRIDGE APPROACH, SECONDARY ROADS	SY	97.800	0.000	97.800	
0050	2301-1032090	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 9 IN.	SY	2,813.000	0.000	2,813.000	
0060	2301-9091000	RUMBLE STRIP PANEL (PCC SURFACE)	EACH	6.000	0.000	6.000	✓
0070	2310-5151040	PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY	CY	12,491.000	0.000	12,491.000	
2 Item(s)							

Add Items
Cancel

Add items to any/all sections desired. You may add items to multiple sections within the same change order if needed only if the sections are divisions under one project number (accounting ID). Do NOT add items to multiple sections in one change order if the sections represent separate projects tied together in one contract.

When the “Add Items” button is clicked, you will be brought back to the Quantity Changes section. Lines will display containing information for any of the items selected in the window above. Ensure the items were added to the correct section. The fields for “Proposed Change”, “Proposed Quantity”, “Fund Package” (if there are multiple fund packages on the contract), and “Reason” will be editable. You may leave the “Reason” field blank. All reasons and descriptions were added on the previous screen.

The screenshot displays the 'Quantity Changes' section of a software application. The main area contains a table with the following columns: Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. Two items are listed:

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package
0030	2214-5145150	74,947.000	SY	\$1.350	0.000	74,947.000	\$0.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153
0060	2301-9091000	6.000	EACH	\$25.000	0.000	6.000	\$0.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

Below each item, there is a 'Reason' field with a red 'X' icon, indicating it is required but empty. The interface includes a sidebar with navigation options like 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', and 'PUNCH LIST'. At the bottom, there are 'Save' and 'Cancel' buttons and a 'Total Proposed Amount: \$0.00'.

Enter a value in either the “Proposed Change” or “Proposed Quantity” field, not both. Entering data in one of these fields will automatically cause the other field to update accordingly. Entries in the “Proposed Change” field should reflect the increase or decrease (positive or negative) in quantity to the existing item. Entries in the “Proposed Quantity” field should reflect the final total for the item after increases or decreases have been made.

The screenshot displays a software interface for managing 'Quantity Changes'. The interface includes a sidebar on the left with navigation options like 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', 'PUNCH LIST', and a currency symbol. The main area shows a table with the following columns: Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. The table is divided into sections. The first section is 'Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS'. It contains two rows of data. The first row is for 'PAVEMENT SCARIFICATION' with Line Number 0030, Item ID 2214-5145150, Quantity 74,947.000, Unit SY, and Unit Price \$1.350. The 'Proposed Change' field contains '-120.000' and the 'Proposed Quantity' field contains '74,827.000'. The second row is for 'RUMBLE STRIP PANEL (PCC SURFACE)' with Line Number 0060, Item ID 2301-9091000, Quantity 6.000, Unit EACH, and Unit Price \$25.000. The 'Proposed Change' field contains '3.000' and the 'Proposed Quantity' field contains '9.000'. Both rows have a 'Reason' text area below them. The second section is 'Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS', which displays a message: 'No change order quantities found'. At the bottom right, the 'Total Proposed Amount' is shown as '-\$87.00'. There are 'Save' and 'Cancel' buttons at the top right and bottom center of the interface.

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS								
0030	2214-5145150	74,947.000	SY	\$1.350	-120.000	74,827.000	-\$162.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153
PAVEMENT SCARIFICATION								
0060	2301-9091000	6.000	EACH	\$25.000	3.000	9.000	\$75.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153
RUMBLE STRIP PANEL (PCC SURFACE)								
Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS								
No change order quantities found								
								Total Proposed Amount: -\$87.00

Choose the “Fund Package” in the drop-down that corresponds to the contract section that you are modifying with that line-item entry. If there is only one fund package for the contract, you will not see this option. If your quantity change is non-participating, ensure you select a non-participating funding package. Refer to Section 4 of the [Appia Project Creation & Account Management Instructions](#) for guidance on creating funding packages.

The screenshot displays the 'Quantity Changes' section of a software application. The interface includes a sidebar on the left with navigation options such as 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', and 'PUNCH LIST'. The main content area shows a table with columns: Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. Two rows are visible, each with a 'Fund Package' dropdown menu highlighted by a green oval. The first row is for 'PAVEMENT SCARIFICATION' (Line 0030) and the second is for 'RUMBLE STRIP PANEL (PCC SURFACE)' (Line 0060). Both rows have a blue 'Split' button to their right. The interface also includes a 'Save' and 'Cancel' button at the top right, and a 'Total Proposed Amount: -\$87.00' at the bottom right.

If the quantity change for any given item needs to be split amongst multiple funding packages, click the blue “Split” button on the right end of the line containing the item’s information. The “split” option will only shown if there are two or more fund packages available to choose from.

0060 2301-9091000 6.000 EACH \$25.000 3.000 9.000 \$75.00 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153

RUMBLE STRIP PANEL (PCC SURFACE)

Reason

Reason

STOCKPILES

TIME LIMITS

Split

Once the “Split” button is clicked, boxes will appear under the item for each existing fund package. Enter the quantity corresponding to each of the funding packages in the associated box. The total “Proposed Change” will update automatically.

0060 2301-9091000 6.000 EACH \$25.000 3.000 9.000 \$75.00 Split by 3 packages Reset

RUMBLE STRIP PANEL (PCC SURFACE)

Reason

Reason

21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 2.000

001 CLAY CO LOCAL 21-C021-153 1.000

001 CLAY CO FM 21-C021-154 0.000

If you pushed, “Split” by mistake or no longer wish to split the change in quantity amongst multiple fund packages, simply click the red “Reset” button in the upper, right corner of the item’s line.

0060 2301-9091000 6.000 EACH \$25.000 3.000 9.000 \$75.00 Split by 3 packages Reset

RUMBLE STRIP PANEL (PCC SURFACE)

Reason

Reason

21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153 2.000

001 CLAY CO LOCAL 21-C021-153 1.000

001 CLAY CO FM 21-C021-154 0.000

To delete an item that was added by mistake, click on the red circle with the “x” at the right end of the line containing the item’s information.

DAILY ACTIVITIES Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS Select Items

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package	Buttons
0010	2110-3825010	760.000	TON	\$7.900	20.000	780.000	\$158.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Save Split

GRANULAR MATERIAL Reason

Once all Quantity Changes entries are complete, click the blue "Save" button in the upper, right corner or in the bottom, center of the screen.

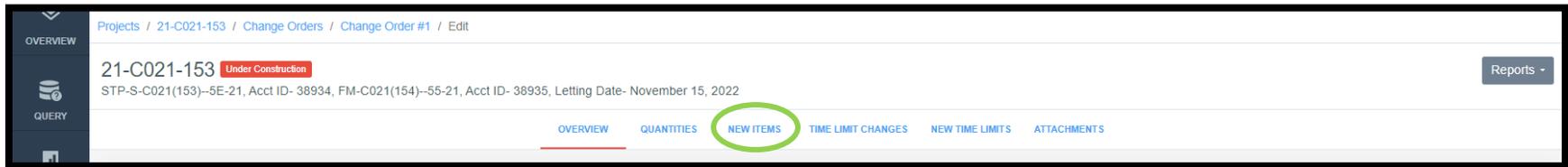
ALL REPORTS **Quantity Changes** Select Items Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package	Buttons	
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS										
0030	2214-5145150	74,947.000	SY	\$1.350	-120.000	74,827.000	-\$162.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Save Split	
PAVEMENT SCARIFICATION Reason										
0060	2301-9091000	6.000	EACH	\$25.000	3.000	9.000	\$75.00	Split by 3 packages	Reset	
RUMBLE STRIP PANEL (PCC SURFACE) Reason										
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153					2.000	001 CLAY CO LOCAL 21-C021-153				1.000
001 CLAY CO FM 21-C021-154					0.000					
Displaying all 2 change order quantities										
Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS Select Items										
No change order quantities found										
								Total Proposed Amount: -\$87.00		
					Save Cancel					

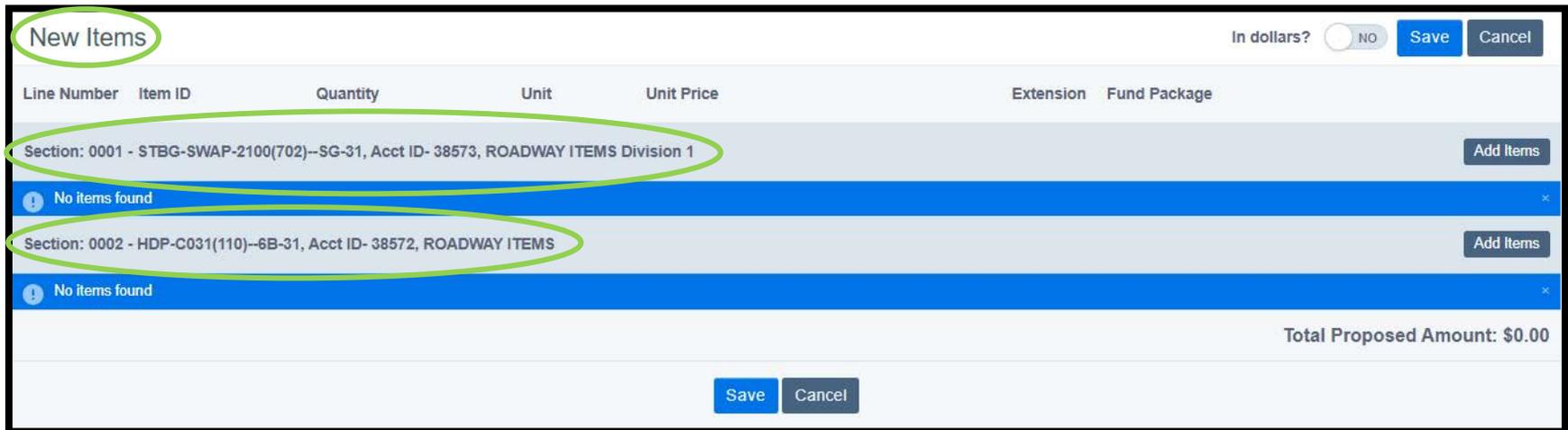
CONTRACTORS

2) New Items / New Items (Edit Mode)

Use New Items when adding an item that does not yet exist in the chosen section of the contract. To enter a new item, click the gray “Edit” button on the right end of the New Items line. (If in edit mode, click on the “New Items” tab near the top, center of the screen.)



This will bring you to the New Items data entry screen. If there are multiple sections in your Appia project (different tied projects in the contract or different divisions within a contract), you will see lines for each independent section as shown below. If only one section is present on the contract, only one section will be displayed.



To select the item(s) that is being added by the change order, click the gray “Add Items” button on the right end of the line. For Appia projects with multiple sections, be sure to click the “Add Items” button on the line that corresponds with the section the item is to be added to. You may add items to multiple sections within the same change order if needed only if the sections are divisions under one project number. Do NOT add items to multiple sections in one change order if the sections represent separate projects tied together in one contract.

The screenshot shows a web interface titled "New Items". At the top right, there is a toggle for "In dollars?" set to "NO", and "Save" and "Cancel" buttons. Below this is a table with columns: "Line Number", "Item ID", "Quantity", "Unit", "Unit Price", "Extension", and "Fund Package".

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS						
No items found						
Section: 0002 - FM-C021(154)--5E-21, Acct ID- 38935, ROADWAY ITEMS						
No items found						

At the bottom right of the table area, it says "Total Proposed Amount: \$0.00". At the bottom center, there are "Save" and "Cancel" buttons. Two "Add Items" buttons are circled in green, one at the end of each section row.

When “Add Items” is chosen, the window shown below will pop up. It contains a list of the items available in your Reference Data. If no items are currently in the view, select the appropriate reference data collection from the drop-down menu in the upper, left corner of the window. (Refer to Section 17 of the [Appia Project Creation & Account Management Instructions](#) for guidance on adding items to Reference Data if your item is not available.) You can search for a particular item in the search bar, or you can use the scroll bar on the right side (or scroll with your mouse) to scroll through the items. An option to navigate to another page can be found by scrolling to the very bottom of the list.

Add Item(s) to Section

Collection: Iowa DOT Reference Data Collection (Current) Search

Item ID	Description	Unit
2101-0850001	CLEARING AND GRUBBING	ACRE
2101-0850002	CLEARING AND GRUBBING	UNIT
2101-1001005	REMOVAL OF FLOOD DEBRIS	TON
2101-1001010	REMOVAL OF DEBRIS FROM WATERWAY AREAS	LS
2102-0425046	SELECTED BACKFILL	CY
2102-0425070	SPECIAL BACKFILL	TON
2102-0425071	SPECIAL BACKFILL	CY
2102-0425120	SPECIAL BACKFILL MATERIAL, PLACE ONLY	TON
2102-0425220	SPECIAL BACKFILL MATERIAL, PLACE ONLY	CY
2102-2200000	INTERCEPTING DITCHES AND FLUMES	LF

0 Item(s) Add Items Cancel

1 2 3 4 5 ... Next > Last »

Displaying items 1 - 30 of 4712 in total

To select an item, simply click on the line containing the item's information. A number "1" will appear in the green rectangle on the left side of the line containing the item's information. Select items as many times as needed. If an item is selected more than once, a number corresponding to the number of selections will appear in the green rectangle (i.e., a "2" for two entries, a "3" for three entries, etc.). Multiple items may be selected. Select all desired items. If an item is selected by mistake, simply click on the red circle with the "x" on the right end of the line containing the item's information, and the number in the green rectangle will be reduced. When all desired items have been selected, click the blue "Add Items" button in the bottom, right corner of the window.

Add Item(s) to Section

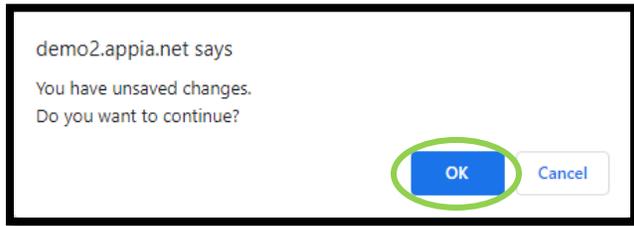
Collection: Iowa DOT Reference Data Collection (Current)

0	2102-0425070	SPECIAL BACKFILL	TON	<input type="checkbox"/>
0	2102-0425071	SPECIAL BACKFILL	CY	<input type="checkbox"/>
0	2102-0425120	SPECIAL BACKFILL MATERIAL, PLACE ONLY	TON	<input type="checkbox"/>
0	2102-0425220	SPECIAL BACKFILL MATERIAL, PLACE ONLY	CY	<input type="checkbox"/>
1	2102-2200000	INTERCEPTING DITCHES AND FLUMES	LF	<input type="checkbox"/>
0	2102-2624980	CONTRACTOR FURNISHED SELECT TREATMENT	CY	<input type="checkbox"/>
2	2102-2625000	EMBANKMENT -IN-PLACE	CY	<input checked="" type="checkbox"/>
0	2102-2625001	EMBANKMENT-IN-PLACE, CONTRACTOR FURNISHED	CY	<input type="checkbox"/>
0	2102-2625010	EMBANKMENT-IN-PLACE, STOCKPILE	CY	<input type="checkbox"/>
0	2102-2710070	EXCAVATION, CLASS 10, ROADWAY AND BORROW	CY	<input type="checkbox"/>
0	2102-2710080	EXCAVATION, CLASS 10, UNSUITABLE OR UNSTABLE MATERIAL	CY	<input type="checkbox"/>

3 Item(s)

Add items to any/all sections desired.

When navigating between pages of items, a pop-up window may appear saying you have unsaved changes and asking if you want to continue. Click the blue "OK" button.



When the “Add Items” button is clicked, you will be brought back to the New Items section. Lines will display containing information for any of the items selected in the window above. Check to make sure the items were added to the correct section. The fields for “Line Number”, “Quantity”, “Unit Price”, “Fund Package”, and “Reason” will be editable. The Fund Package option will only be shown if there are multiple fund packages available for the project. You may leave the “Reason” field blank. All reasons and descriptions were added on the previous screen.

New Items
In dollars? NO Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package	
Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1 Add Items							
1770	2102-2200000	0.000	LF	\$0.000	\$0.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✖
INTERCEPTING DITCHES AND FLUMES				Reason Reason ✖			
1780	2102-2625000	0.000	CY	\$0.000	\$0.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✖
EMBANKMENT-IN-PLACE				Reason Reason ✖			
1790	2102-2625000	0.000	CY	\$0.000	\$0.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✖
EMBANKMENT-IN-PLACE				Reason Reason			
Displaying all 3 items							
Section: 0002 - HDP-C031(110)--6B-31, Acct ID- 38572, ROADWAY ITEMS Add Items							

! No items found
✖

For projects let prior to 2025 only, for the first new item, override the auto-populated Line Number by entering 8010.

After the first new item, Appia will continue numbering sequentially by increments of 10 (8020, 8030, etc.).

For projects let in 2025 and after, the project setup file will contain a “dummy” 8000 item as a placeholder. Because of this, the first new item added to the contract will automatically receive the 8010 number, so the user will not have to adjust the numbering, except for on contracts with multiple projects to accommodate the alphabetical supplement.

However, for all projects, a new item for liquidated damages always needs to be numbered 8998 per [I.M. 6.000, Attachment D](#), so the item number for this item in particular will need to be overwritten, and the next item added after this liquidated damages item will need to be set back to the previous numbering sequence.

Refer to [I.M. 6.000, Attachment D](#), section 2.36. See Section A of the “Preparation of Change Order (Form 831240 or Appia Change Order)” subsection for guidance on numbering.

Also, enter a value in each the “Quantity” and “Unit Price” fields.

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package
8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702
Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1						
INTERCEPTING DITCHES AND FLUMES						
8020	2102-2625000	350.700	CY	\$15.000	\$5,260.50	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702
EMBANKMENT-IN-PLACE						

Choose the "Fund Package" in the drop-down that corresponds to the contract section that you are modifying with the line-item entry. If your new item is non-participating, ensure you select a non-participating funding package. Refer to [Section 4 of the Appia Project Creation & Account Management Instructions](#) for guidance on creating funding packages.

New Items

In dollars? NO Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package	
Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1 Add Items							
8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✕
INTERCEPTING DITCHES AND FLUMES					Reason Reason		
8020	2102-2625000	350.700	CY	\$15.000	\$5,260.50	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✕
EMBANKMENT-IN-PLACE					Reason Reason		
Displaying all 2 items							
Section: 0002 - HDP-C031(110)--6B-31, Acct ID- 38572, ROADWAY ITEMS Add Items							
ⓘ No items found ✕							
						Total Proposed Amount: \$37,260.50	

If the quantity for any given item needs to be split amongst multiple funding packages, click the blue “Split” button on the right end of the line containing the item’s information.

This screenshot shows the initial form for entering an item. The fields include: Item ID (8020), Agency (2102-2625000), Quantity (350.700), Unit (CY), Amount (\$15,000), Total Amount (\$5,260.50), and a dropdown menu for funding packages (31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702). A blue "Split" button with a red 'x' icon is circled in green on the right side. Below the main fields, there is a "Reason" section with a text input field.

Once the “Split” button is clicked, boxes will appear under the item for each existing fund package. Enter the quantity corresponding to each of the funding packages in the associated box. Once you enter a quantity in one of the fund packages, Appia will automatically assign the balance to another funding package using the total quantity assigned on the main item entry line. (In the screenshot shown below, total quantity of 100.000 was entered on the main item entry line. When a quantity of 250.700 was entered in the first funding package line, it automatically assigned a quantity of 100.000 to the second fund package line.) For splits between more than two fund packages, you may need to keep adjusting the numbers in the individual fund packages until you achieve the correct split. **Make sure you only assign quantity to fund packages applicable to the section the new item was added to.**

This screenshot shows the form after clicking the "Split" button. The main item fields are the same, but the quantity (350.700) is circled in green. A "Split by 3 packages" button is now visible. Below the main fields, there are three rows of funding packages, each with a quantity input box: 31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702 (250.700), 31-2100-702-CAT-2 31-2100-702-CAT-2 31-2100-702 (100.000), and 31-C031-110-CAT-1 31-C031-110-CAT-1 31-C031-110 (0.000). The quantity boxes for 250.700 and 100.000 are circled in green. A "Reason" section is also present.

If you wish to view/enter dollar amounts rather than quantities for split funding packages, click on the “In dollars?” toggle near the upper, right corner of the screen.

New Items In dollars? NO YES Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package	
Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1 Add Items							
8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✕
INTERCEPTING DITCHES AND FLUMES				Reason <input type="text"/>			
8020	2102-2625000	350.700	CY	\$15.000	\$5,260.50	Split by 3 packages	Reset ✕
EMBANKMENT-IN-PLACE				Reason <input type="text"/>			
31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702				31-2100-702-CAT-2 31-2100-702-CAT-2 31-2100-702			
<input type="text" value="250.700"/>				<input type="text" value="100.000"/>			
31-C031-110-CAT-1 31-C031-110-CAT-1 31-C031-110							
<input type="text" value="0.000"/>							

If you pushed “Split” by mistake or no longer wish to split the change in quantity amongst multiple fund packages, simply click the red “Reset” button in the upper, right corner of the item’s line.

8020	2102-2625000	350.700	CY	\$15.000	\$5,260.50	Split by 3 packages	Reset
EMBANKMENT-IN-PLACE				Reason			
				Reason			
31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702				31-2100-702-CAT-2 31-2100-702-CAT-2 31-2100-702			
250.700				100.000			
31-C031-110-CAT-1 31-C031-110-CAT-1 31-C031-110							
0.000							

To delete an item that was added by mistake, click on the red circle with the “x” at the right end of the line containing the item’s information.

8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split
INTERCEPTING DITCHES AND FLUMES				Reason			
				Reason			

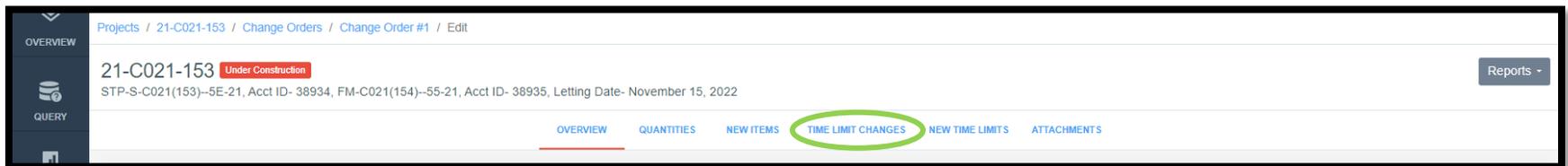
Once all New Item entries are complete, click the blue "Save" button in the upper, right corner or in the bottom, center of the screen.

New Items In dollars? NO YES **Save** **Cancel**

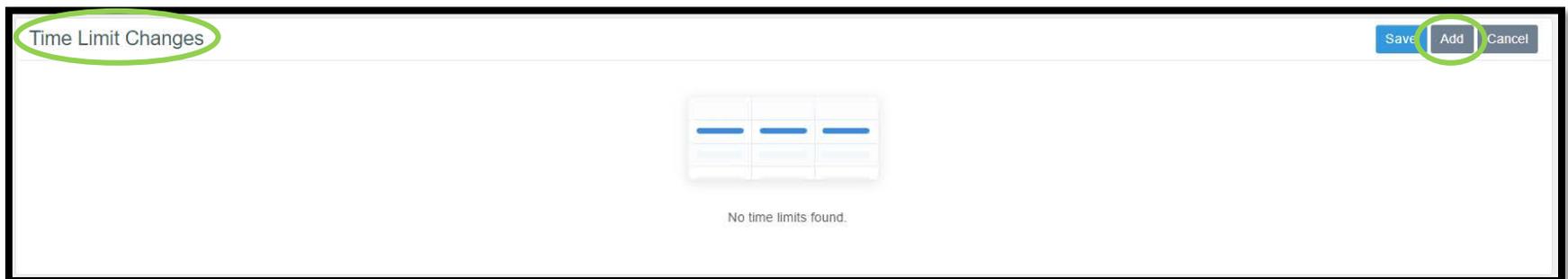
Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package	
Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1 Add Items							
8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split ✕
INTERCEPTING DITCHES AND FLUMES				Reason Reason			
8020	2102-2625000	350.700	CY	\$15.000	\$5,260.50	Split by 3 packages	Reset ✕
EMBANKMENT-IN-PLACE				Reason Reason			
31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702				31-2100-702-CAT-2 31-2100-702-CAT-2 31-2100-702			
250.700				100.000			
31-C031-110-CAT-1 31-C031-110-CAT-1 31-C031-110							
0.000							

3) [Time Limit Changes](#) / [Time Limit Changes \(Edit Mode\)](#)

Use Time Limit Changes when making a change to an existing contract time limit (i.e., extending the number of working days on a contract). To enter a time limit change, click the gray “Edit” button on the right end of the Time Limit Changes line. (If in edit mode, click on the “Time Limit Changes” tab near the top, center of the screen.)



This will bring you to the Time Limit Changes data entry screen. To modify an existing time limit, click on the blue “Add” button in the upper, right corner.



An “Add Time Limit(s)” window will pop up. If multiple time limits are present on the contract, there will be multiple lines displaying, one for each distinct time limit. As shown in the screenshot below, the “Add Time Limits” button in the lower, right corner is initially grayed out.

The screenshot shows a window titled "Add Time Limit(s)" with a search bar at the top. Below the search bar is a table with columns "Description", "Deadline", and "Days Charged". The table contains one row: "Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600" with a deadline of "80.0 Working Days" and "0" days charged. Below the table, it says "Displaying 1 time limits". At the bottom left, it says "0 Time Limits(s)". At the bottom right, there are two buttons: "Add Time Limits" (which is grayed out) and "Cancel".

Description	Deadline	Days Charged
Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600	80.0 Working Days	0

View with multiple time limits

The screenshot shows a window titled "Add Time Limit(s)" with a search bar at the top. Below the search bar is a table with columns "Description", "Deadline", and "Days Charged". The table contains two rows: "Road closure of Melrose Avenue/IWV Road. See details below., Liquidated Damages- 2,000.00" with a deadline of "20.0 Calendar Days" and "0" days charged, and "Working Days, Late Start Date- 12 July 2021, Liquidated Damages- 2,000.00" with a deadline of "150.0 Working Days" and "0" days charged. Below the table, it says "Displaying all 2 time limits". At the bottom left, it says "0 Time Limits(s)". At the bottom right, there are two buttons: "Add Time Limits" (which is grayed out) and "Cancel".

Description	Deadline	Days Charged
Road closure of Melrose Avenue/IWV Road. See details below., Liquidated Damages- 2,000.00	20.0 Calendar Days	0
Working Days, Late Start Date- 12 July 2021, Liquidated Damages- 2,000.00	150.0 Working Days	0

To move forward with the modification, click on the line containing the time limit to you want to change. A green circle with a check mark will appear on the right end of the line containing the time limit information, and the “Add Time Limits” button in the lower, right corner will turn blue. Click on the “Add Time Limits” button.

Description	Deadline	Days Charged
Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600	80.0 Working Days	0

When the “Add Time Limits” button is clicked, you will be brought to the Time Limit Changes screen. Lines will display containing information for the time limits that you selected in the previous window. The fields for “Deadline Extension” and “Reason” fields will be editable. You may leave the “Reason” field blank. All reasons and descriptions were added on a previous screen.

Type	Authorized Deadline	Days Charged	Deadline Extension	New Deadline	Reason
Working Days	80.0 Days	0.0 Days		80.0 Days	

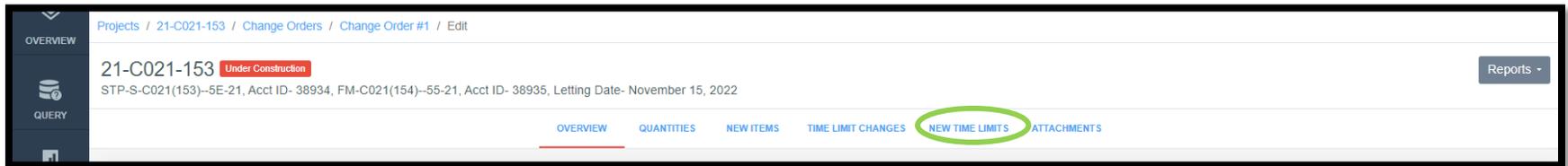
In the “Deadline Extension” field, enter a value reflecting the amount the existing time limit is to be changed. For example, if three working days are being added, enter “3.0”. The value entered may be either positive or negative (an increase or a reduction in days). The “New Deadline” field will automatically update to add in/subtract the value entered in the “Deadline Extension” field. If you missed adding a time limit and want to add it now, click on the gray “Add” button in the upper, right corner or bottom, center of the page. If all time limit modifications have been entered, click on the blue “Save” button in either the upper, right corner or the bottom, center of the page.

The screenshot displays the 'Time Limit Changes' interface. At the top, there are navigation tabs: OVERVIEW, QUANTITIES, NEW ITEMS, TIME LIMIT CHANGES (selected), NEW TIME LIMITS, and ATTACHMENTS. Below the tabs, the title 'Time Limit Changes' is shown. In the top right corner, there are three buttons: 'Save' (blue), 'Add' (gray), and 'Cancel' (gray). The main area contains a table with the following columns: Type, Authorized Deadline, Days Charged, Deadline Extension, New Deadline, and Reason. The table has one row with the following data: Type: Working Days, Authorized Deadline: 80.0 Days, Days Charged: 0.0 Days, Deadline Extension: 2.0, New Deadline: 82.0 Days, Reason: (empty). Below the table, it says 'Displaying 1 time limit'. At the bottom center, there are two buttons: 'Save' (blue) and 'Add' (gray).

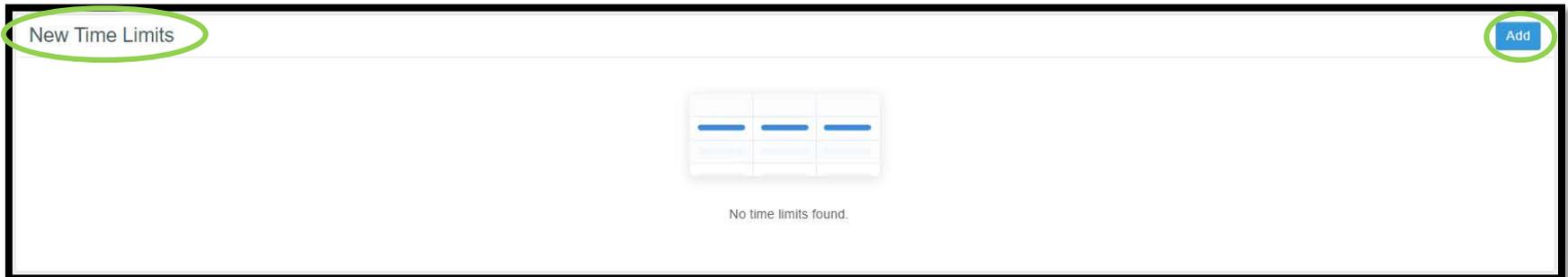
Type	Authorized Deadline	Days Charged	Deadline Extension	New Deadline	Reason
Working Days	80.0 Days	0.0 Days	2.0	82.0 Days	

4) [New Time Limits / New Time Limits \(Edit Mode\)](#)

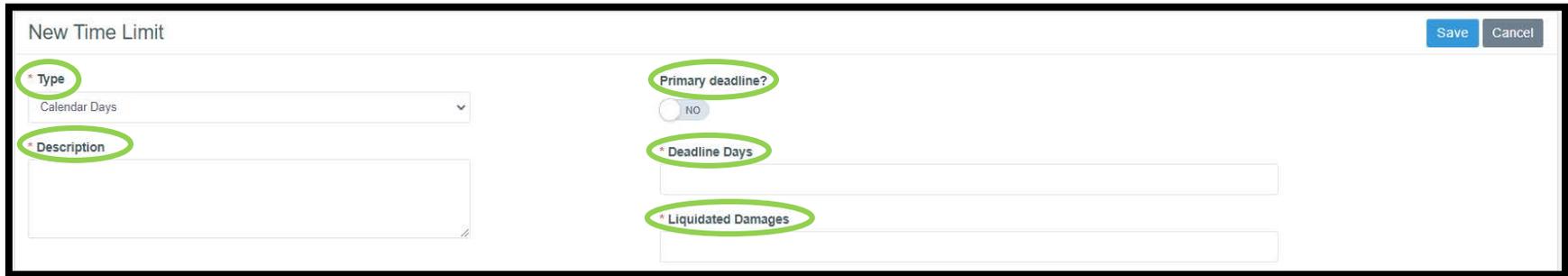
Use New Time Limits only when adding a completely new time constraint to the contract, such as a new site time. Do not use this option if you are simply adding/subtracting days from an existing time limit. To enter a new time limit, click the gray “Edit” button on the right end of the New Time Limits line. (If in edit mode, click on the “New Time Limits” tab near the top, center of the screen.)



This will bring you to the New Time Limits screen. To add a new time limit, click on the blue “Add” button in the upper, right corner.



Clicking the blue “Add” button will bring you to the New Time Limit data entry screen. The fields for “Type”, “Description”, “Deadline Days”, and “Liquidated Damages” will be editable. Additionally, there is a toggle for “Primary deadline?”.



The screenshot shows the 'New Time Limit' form with the following fields highlighted in green circles: 'Type' (a dropdown menu currently showing 'Calendar Days'), 'Description' (a text input field), 'Primary deadline?' (a toggle switch currently set to 'NO'), 'Deadline Days' (a text input field), and 'Liquidated Damages' (a text input field). The form also has 'Save' and 'Cancel' buttons in the top right corner.

In the “Type” box, there is a pull-down menu with three choices: “Calendar Days”, “Completion Date”, and “Working Days”. Choose the appropriate option for your new time limit.



This close-up shows the 'Type' dropdown menu with three options: 'Calendar Days', 'Completion Date', and 'Working Days'. The 'Calendar Days' option is currently selected and highlighted in blue.

In the “Description Box”, enter the following pieces of text information separated by commas.

- The type of time limit (whichever of the three choices was chosen in the pull-down menu under “Type”).
- The time limit constraint
 - For calendar day limits, enter “Calendar Days – xx” with “x” being the number of days.
 - If the limit is associated with a specific site time rather than an overall contract limit, enter the description of the phase/site being addressed instead of “Calendar Days – xx”. For example, “Road closure of Melrose Avenue”.
 - For completion day limits, enter “Completion Date – mm/dd/yyyy”
 - For working day limits, enter “Late Start Date – mm/dd/yyyy”, or “Specified Start Date – mm/dd/yyyy”, or “Approximate Start Date – mm/dd/yyyy”
- The liquidated damages. Enter “Liquidated Damage Rate – x,xxx” with “x” being the \$ of damage per day.

In the “Deadline Days” or “Deadline Date” box, enter the number of days for the time limit, or, in the case of a completion date time limit, select the appropriate completion date from the calendar that will pop up when you click in the box.

In the “Liquidated Damages” box, **enter 0.00**. If a value is entered into this field, Appia will automatically deduct damages from the “bottom line” of a payment if the time limit is exceeded. This is not how Iowa DOT allows damages to be handled. Liquidated damages must be addressed by a separate change order specific to the number of days that incurred damages. Entering 0.00 in this field will result in a zero calculation if days are exceeded, so no damages will be taken from the “bottom line” of payments without a change order.

For the “Primary deadline?” toggle, toggle the switch to “Yes” (blue) if this site time is the time constraint for the overall contract. Leave the toggle switch at “No” (gray) if the time limit being created is a site time or is not the time constraint for the overall contract.

Calendar Day example – Overall contract limit

<p>* Type</p> <p>Calendar Days</p>	<p>Primary deadline?</p> <p><input checked="" type="checkbox"/> YES</p>
<p>* Description</p> <p>Calendar Days, Calendar Days - 90, Liquidated Damage Rate - 1,500</p>	<p>* Deadline Days</p> <p>90.0</p>
	<p>* Liquidated Damages</p> <p>\$0.00</p>

Calendar Day example – Site time only

<p>* Type</p> <p>Calendar Days</p>	<p>Primary deadline?</p> <p><input type="checkbox"/> NO</p>
<p>* Description</p> <p>Calendar Days, Closure of intersection of Hwy 3 and 230th St., Liquidated Damage Rate - 1,500</p>	<p>* Deadline Days</p> <p>10.0</p>
	<p>* Liquidated Damages</p> <p>\$0.00</p>

Completion Date example

* Type Completion Date	Primary deadline? <input type="radio"/> NO
* Description Completion Date, Completion Date - 03/12/2024, Liquidated Damage Rate - 1,500	* Deadline Date 03/12/2024
	* Liquidated Damages \$0.00

Working Days example

* Type Working Days	Primary deadline? <input checked="" type="radio"/> YES
* Description Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500	* Deadline Days 40.0
	* Liquidated Damages \$0.00

When all of the information has been entered in the fields, click the blue “Save” button in the upper, right corner.

New Time Limit		<input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/>
* Type Working Days	Primary deadline? <input checked="" type="radio"/> YES	
* Description Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500	* Deadline Days 40.0	
	* Liquidated Damages \$0.00	

When the “Save” button is clicked, you will be brought back to the New Time Limits screen. This screen will now include a line displaying the information for the new time limit you just created. If you wish to add another time limit, click the blue “Add” button in the upper, right corner. If you wish to edit the new time limit you just created, click on the blue circle with the pencil on the right end of the line containing the time limit information. If you wish to delete the new time limit you just entered, click on the red circle with the “x” on the right end of the line containing the time limit information. If everything is correct, and you don’t want to make any further changes to new time limits, simply click on one of the other tabs along the top of the change order window.

21-C021-153 Under Construction
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

OVERVIEW QUANTITIES NEW ITEMS TIME LIMIT CHANGES **NEW TIME LIMITS** ATTACHMENTS

New Time Limits

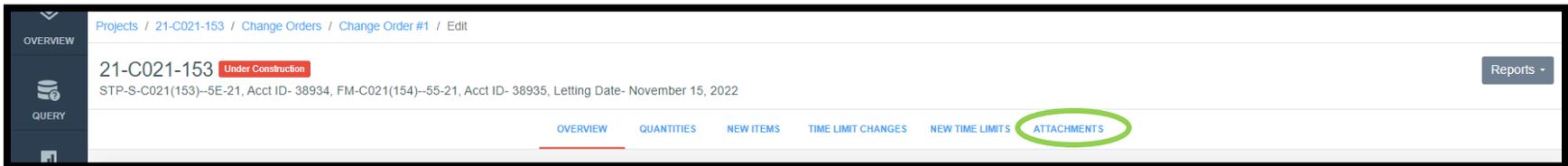
Add

Description	Liquidated Damages per Day	Deadline
Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500	\$0.00	40.0 Working Days

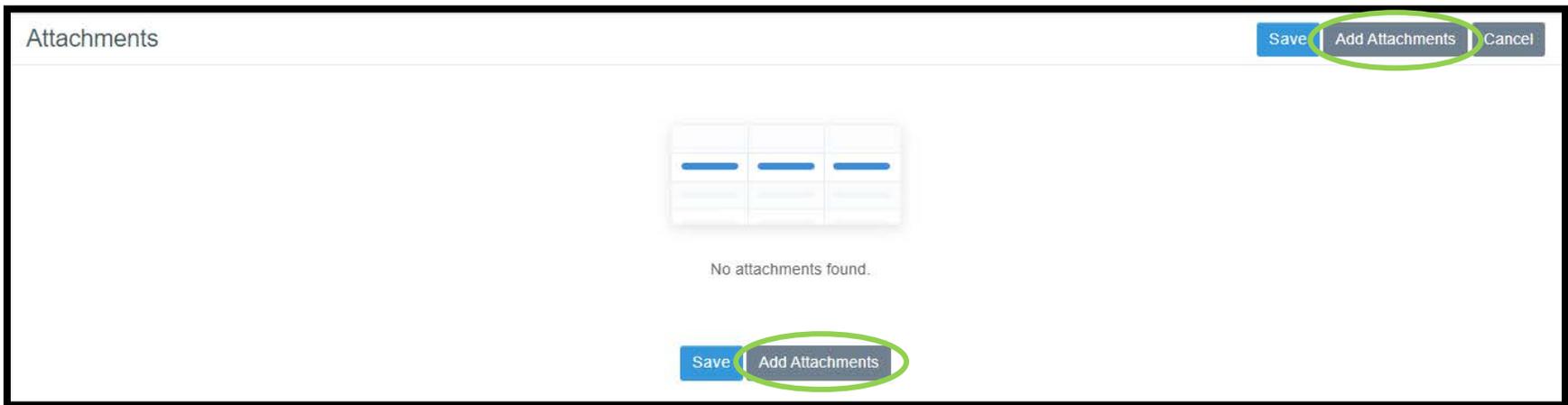
Displaying 1 time limits

5) Attachments / Attachments (Edit Mode)

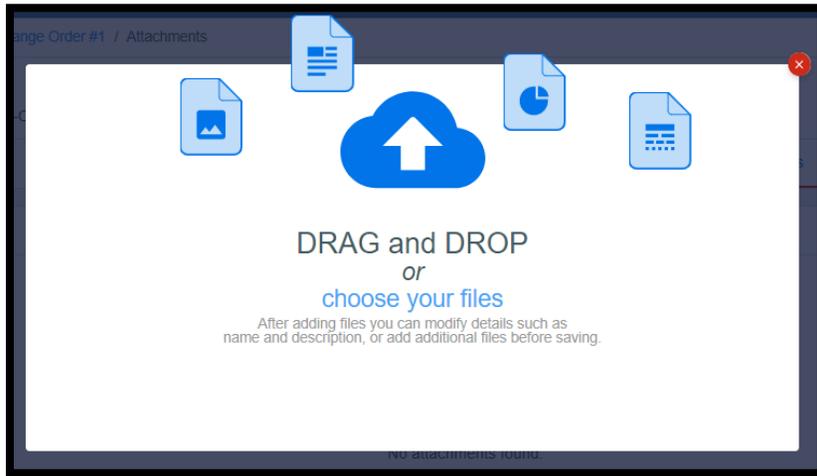
Attachments may be added to a change order. They can be downloaded for viewing. The printed change order report will show that files were attached to the change order, but the attachments themselves will not print/display in the change order report. To add an attachment to a change order, click the gray “Edit” button on the right end of the Attachments line. (If in edit mode, click on the “Attachments” tab near the top, center of the screen.)



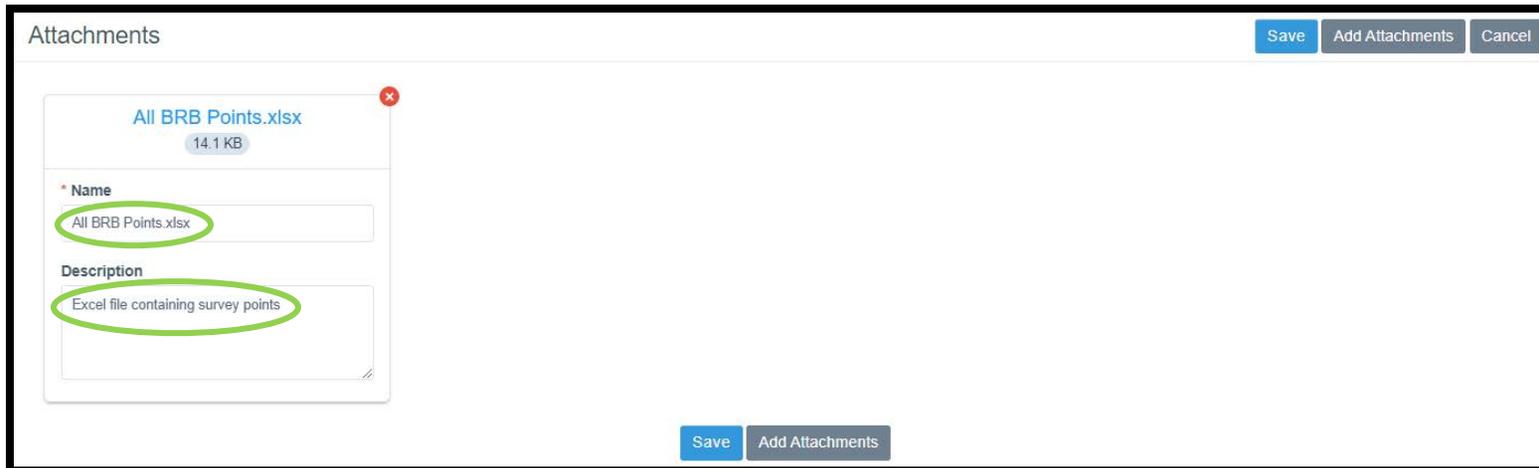
This will bring up the Attachments screen. Click on the gray “Add Attachments” button in either the top, right corner or bottom, center of the screen.



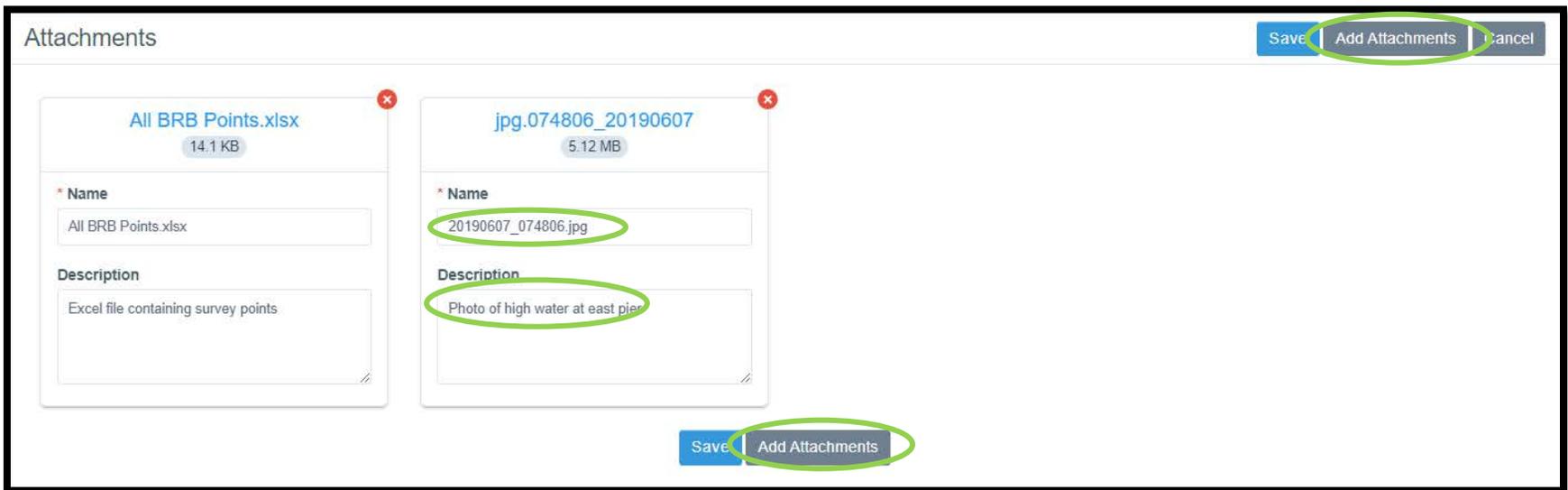
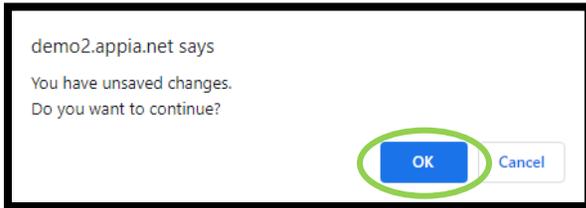
An upload window will pop up with a message saying, “DRAG and DROP or choose your files”. Either drag the desired file from an open windows explorer file to this box or click on “choose your files” to navigate to the desired file. Any file type/size is acceptable.



Once a file is added, the pop-up window will disappear, and the Attachments screen will come back. Now, it will show a file. Rename the file in the “Name” field and add a description of the file in the “Description” box.



If you want to add another attachment, click the gray “Add Attachments” button in either the top, right corner or bottom, center of the screen. A message may pop up saying you have unsaved changes and asking if you want to continue. Click the blue “OK” button. Your previously uploaded file will not be removed. The pop-up window will then appear that allows you to drag and drop or choose your file. Enter the name and description for your newly added file.



If you uploaded the file by mistake, click on the red circle with the “x” in the upper, right corner of the box with the file’s information. If you have uploaded the desired files and everything looks correct, click the blue “Save” button in either the top, right corner or bottom, center of the screen.

The screenshot shows the 'Attachments' form with two file upload boxes. The first box is for 'All BRB Points.xlsx' (14.1 KB) with a description 'Excel file containing survey points'. The second box is for 'jpg.074806_20190607' (5.12 MB) with a description 'Photo of high water at east pier'. The form has 'Save', 'Add Attachments', and 'Cancel' buttons at the top right and bottom center. A green circle highlights the 'Save' button at the top right and the 'Save' button at the bottom center. Red 'x' icons are in the top right of each file box, and a green circle highlights the 'x' in the second file box.

Clicking “Save” will bring you back to the change order screen. Attached files will display as shown in the screenshot below. These files can be downloaded for viewing by clicking on the blue circle with the down arrow on the left side of the file information line.

The screenshot shows the 'Attachments' list with two files. The first file is '20190607_074806.jpg' with a description 'Photo of high water at east pier' and a submission date of '02/22/2023 11:32 AM EST'. The second file is 'All BRB Points.xlsx' with a description 'Excel file containing survey points' and a submission date of '02/22/2023 11:22 AM EST'. The list shows 'Displaying all 2 attachments'. A green circle highlights the download icon (blue circle with a down arrow) for the first file.

Name	Description	Submission Date
20190607_074806.jpg	Photo of high water at east pier	02/22/2023 11:32 AM EST
All BRB Points.xlsx	Excel file containing survey points	02/22/2023 11:22 AM EST

Displaying all 2 attachments

When printed, attachments will show at the end of the change order as shown in the screenshot below.

Attachments			
Document	Name	Description	Submission Date
20190607_074806.jpg	20190607_074806.jpg	Photo of high water at east pier	02/22/2023 11:32 AM EST
All_BRB_Points.xlsx	All BRB Points.xlsx	Excel file containing survey points	02/22/2023 11:22 AM EST
2 attachments			

All information entered in any of the change order screens or tabs will update and display in the main change order view. An example is shown below.

The screenshot displays a software interface for managing change orders. At the top, the order number '21-C021-153' is shown with a red 'Under Construction' status tag. Below this, the order details include 'STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022'. On the right side of the header, there are buttons for 'Submit For Approval', 'Actions', and 'Reports'. A left-hand navigation menu contains icons and labels for 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', and 'CHANGE ORDERS' (which is highlighted in red). The main content area is titled 'Change Order' and includes an 'Edit' button. The details are organized into sections: 'Date Created' (02/21/2023), 'Status' (Draft), 'Summary', 'Description' (Appia Instructions), 'Type' (Non-Significant - Federal-aid Participating), 'Total Proposed Amount' (\$26,713.00), 'B - Reason for change:' (Appia Instructions), 'C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:' (Appia Instructions), 'D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):' (Appia Instructions), and 'E - Contract time adjustment:' (Appia Instructions).

21-C021-153 Under Construction

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Change Order Edit

Date Created	02/21/2023	Status	Draft
Summary		Type	Non-Significant - Federal-aid Participating
Description	Appia Instructions	Total Proposed Amount	\$26,713.00
B - Reason for change:	Appia Instructions		
C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:	Appia Instructions		
D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):	Appia Instructions		
E - Contract time adjustment:	Appia Instructions		

Quantity Changes								Edit
Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change	
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS								
0030	2214-5145150	SY	74,947.000	-120.000	74,827.000	\$1.350	-\$162.00	
PAVEMENT SCARIFICATION								
	001 CLAY CO FM 21-C021-154		0.000	0.000	0.000	\$1.350	\$0.00	
	001 CLAY CO LOCAL 21-C021-153		0.000	0.000	0.000	\$1.350	\$0.00	
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		74,947.000	-120.000	74,827.000	\$1.350	-\$162.00	
0060	2301-9091000	EACH	6.000	3.000	9.000	\$25.000	\$75.00	
RUMBLE STRIP PANEL (PCC SURFACE)								
	001 CLAY CO FM 21-C021-154		0.000	0.000	0.000	\$25.000	\$0.00	
	001 CLAY CO LOCAL 21-C021-153		0.000	1.000	1.000	\$25.000	\$25.00	
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		6.000	2.000	8.000	\$25.000	\$50.00	
							Total: -\$87.00	
New Items								Edit
Line Number	Item ID	Unit	Quantity	Unit Price	Extension			
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS								
8001	2217-1000000	SY	160.000	\$30.000	\$4,800.00			
RUBBLIZED PAVT								

8002	2301-0690180	SY	100.000	\$220.000	\$22,000.00
BRIDGE APPROACH, RK-18					
001 CLAY CO LOCAL 21-C021-153: 20.000					
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 80.000					
					Total: \$26,800.00

Time Limit Changes [Edit](#)

Type	Original Deadline	Current Deadline	Proposed Extension	Proposed Deadline
Working Days	80.0 Days	80.0 Days	2.0 Days	82.0 Days

New Time Limits [Edit](#)

Description	Liquidated Damages per Day	Deadline
Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500	\$0.00	40.0 Working Days

Displaying 1 time limits

Attachments [Edit](#)

Name	Description	Submission Date
20190607_074806.jpg	Photo of high water at east pier	02/22/2023 11:32 AM EST
All BRB Points.xlsx	Excel file containing survey points	02/22/2023 11:22 AM EST

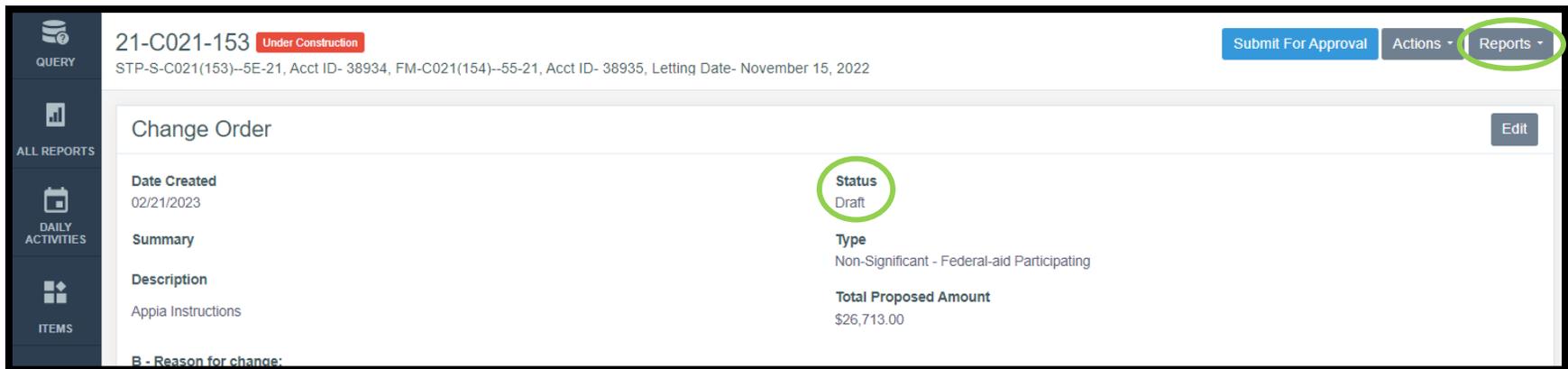
Displaying all 2 attachments

E. Producing a PDF of the Change Order

When all of the necessary and pertinent information has been entered into the change order, generate a PDF of the draft change order by clicking on the gray “Reports” pull-down in the upper, right corner of the change order screen. (Note: The change order “report” is NOT in the “All Reports” menu in Appia.)

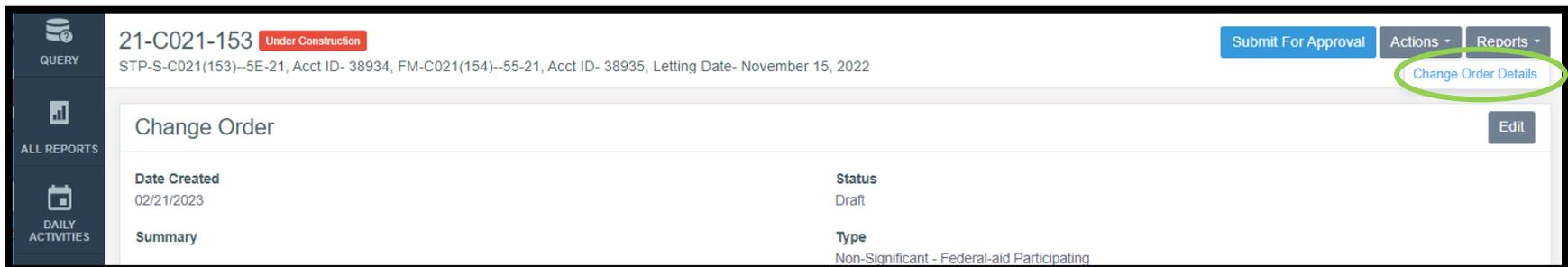
Note: Except for FM-only and locally funded projects, do NOT click on the “Submit for Approval” button until the Administering Team has approved the draft change order. For further guidance on when to apply approvals, see Section [E. Approval Process for Change Orders](#). (FM-only and locally funded projects do not require pre-approval from the Administering Office.)

You can see the status the change order is currently in under “Status”.



The screenshot shows the change order interface for ID 21-C021-153, which is in an "Under Construction" state. The top right corner features a "Submit For Approval" button, an "Actions" dropdown, and a "Reports" dropdown menu, which is circled in green. The main content area displays the "Change Order" title and an "Edit" button. Below this, a table lists key details: "Date Created" (02/21/2023), "Summary" (Appia Instructions), "Description" (Appia Instructions), "Status" (Draft, circled in green), "Type" (Non-Significant - Federal-aid Participating), and "Total Proposed Amount" (\$26,713.00). A section for "B - Reason for change:" is partially visible at the bottom.

From the “Reports” pull-down menu, select “Change Order Details”.



This screenshot is identical to the previous one, but the "Reports" dropdown menu is open, and the "Change Order Details" option is highlighted with a green circle. The rest of the interface, including the "Status" field (Draft) and other details, remains the same.

A PDF of the change order will be download in your browser. Save the PDF to the desired location on your device or server. Change orders that are in “Draft” status will print with a “DRAFT” stamp across them. When the change order has been “Submitted for Approval”, the status will show as “Pending”. When the change order has been “Approved”, the status will show as “Approved”.

	Iowa Local Systems _DEMO ACCOUNT Change Order Details 21-C021-153
Description	STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--5S-21, Acct ID- 38935, Letting Date- November 15, 2022
Prime Contractor	CEDAR VALLEY CORP., LLC. 2637 WAGNER ROAD WATERLOO, IA
Change Order	1
Status	Draft
Date Created	02/21/2023
Type	Non-Significant - Federal-aid Participating
Change Order Description	Appia Instructions
Awarded Project Amount	\$4,553,445.96
Authorized Project Amount	\$4,553,445.96
Change Order Amount	\$26,713.00
Revised Project Amount	\$4,580,158.96
B - Reason for change:	
Appia Instructions	
C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:	
Appia Instructions	
D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):	
Appia Instructions	
Change Order Details: 21-C021-153	02/22/2023 Page 1 of 4

Appia Instructions

E - Contract time adjustment:

Appia Instructions

Increases/Decreases

Line Number	Item ID	Unit	Unit Price	Current		Change		Revised	
				Quantity	Amount	Quantity	Amount	Quantity	Amount
Section: 0001 - STP-S-C021(153)--SE-21, Acct ID- 38934, ROADWAY ITEMS									
0030	2214-5145150	SY	\$1.350	74,947.000	\$101,178.45	-120.000	-\$162.00	74,827.000	\$101,016.45
PAVEMENT SCARIFICATION									
Funding Details									
				0.000	\$0.00	0.000	\$0.00	0.000	\$0.00
		001 CLAY CO FM 21-C021-154		0.000	\$0.00	0.000	\$0.00	0.000	\$0.00
		001 CLAY CO LOCAL 21-C021-153		74,947.000	\$101,178.45	-120.000	-\$162.00	74,827.000	\$101,016.45
		21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153							
0060	2301-9091000	EACH	\$25.000	6.000	\$150.00	3.000	\$75.00	9.000	\$225.00
RUMBLE STRIP PANEL (PCC SURFACE)									
Funding Details									
				0.000	\$0.00	0.000	\$0.00	0.000	\$0.00
		001 CLAY CO FM 21-C021-154		0.000	\$0.00	1.000	\$25.00	1.000	\$25.00
		001 CLAY CO LOCAL 21-C021-153		6.000	\$150.00	2.000	\$50.00	8.000	\$200.00
		21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153							
2 items			Totals		\$101,328.45		-\$87.00		\$101,241.45

Change Order Details:
21-C021-153

02/22/2023
Page 2 of 4

New Items

Line Number	Item ID	Unit	Quantity	Unit Price	Extension
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS					
8001	2217-1000000	SY	160.000	\$30.000	\$4,800.00
RUBBLIZED PAV'T					
Funding Details					
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		160.000	\$30.000	\$4,800.00
8002	2301-0690180	SY	100.000	\$220.000	\$22,000.00
BRIDGE APPROACH, RK-18					
Funding Details					
	001 CLAY CO LOCAL 21-C021-153		20.000	\$220.000	\$4,400.00
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		80.000	\$220.000	\$17,600.00
2 items					Total: \$26,800.00

Funding Summary

Fund Package	Original Amount	Authorized Amount	Proposed Change	Revised Amount
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	\$2,764,180.92	\$2,764,180.92	\$22,288.00	\$2,786,468.92
001 CLAY CO LOCAL 21-C021-153	\$5,475.00	\$5,475.00	\$4,425.00	\$9,900.00
001 CLAY CO FM 21-C021-154	\$1,783,790.04	\$1,783,790.04	\$0.00	\$1,783,790.04
3 fund packages	\$4,553,445.96	\$4,553,445.96	\$26,713.00	\$4,580,158.96

Change Order Details:
21-C021-153

02/22/2023
Page 3 of 4

Time Limit Changes

Type	Original Deadline	Current Deadline	Proposed Extension	Proposed Deadline
Working Days	80.0 Days	80.0 Days	2.0 Days	82.0 Days
Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600				
1 time limit				

New Time Limits

Type	Proposed Deadline	Proposed Cost per Day
Working Days	40.0 Working Days	\$0.00
Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500		
1 time limit		

Attachments

Document	Name	Description	Submission Date
20190607_074806.jpg	20190607_074806.jpg	Photo of high water at east pier	02/22/2023 11:32 AM EST
All_BRB_Points.xlsx	All BRB Points.xlsx	Excel file containing survey points	02/22/2023 11:22 AM EST
2 attachments			

F. Approval Process for Change Orders

City Projects

City projects are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF change orders are created and are manually uploaded to Doc Express. Alternately, for these projects, cities may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

County Projects NOT on the Farm-to-Market System

County projects that are not on the Farm-to-Market system are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF change orders are created and are manually uploaded to Doc Express. Alternately, for these projects, counties may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024

For projects let prior to January 2024, change orders for CPS projects (county projects on the Farm-to-Market system) are generated in Appia and are placed in Doc Express. The Local Systems Regional Field Engineer or Technician then sends them to the Finance Bureau at DOT.LocalSystems@iowadot.us if the project includes State-aid or Federal-aid funding. For FM-only projects, the county sends them to the Finance Bureau at DOT.LocalSystems@iowadot.us directly. These projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

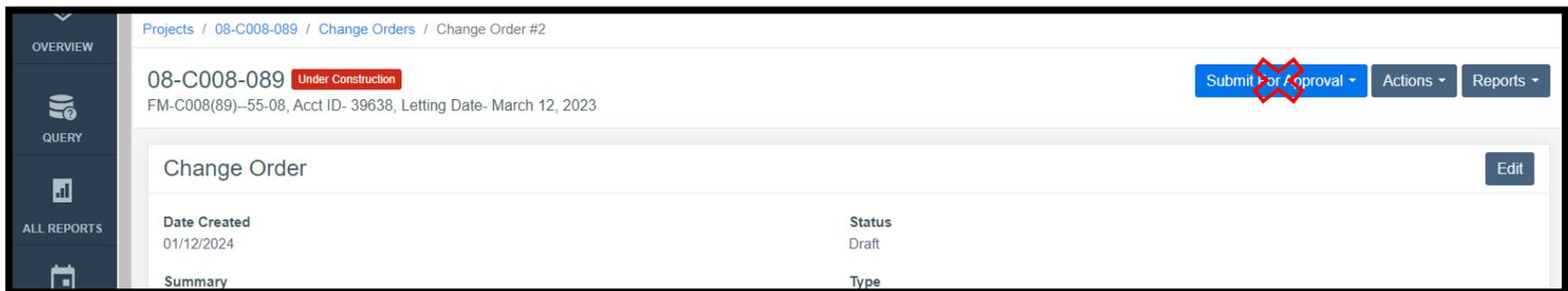
Alternately, for these projects, counties may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

County Projects ON the Farm-to-Market System LET JANUARY 2024 OR LATER

For projects let on or after January 2024, change orders for CPS projects (county projects on the Farm-to-Market system) must follow the automated process. These change orders are generated in Appia, submitted to Doc Express via Appia, signed in Doc Express, updated in Appia, and sent directly to the Finance Bureau from Appia for processing.

1) Submitting Change Orders for Approval NOT Using the Doc Express Integration

Step 1: When all of the necessary and pertinent information has been entered into the change order, send a PDF of the DRAFT change order to the Administering Team. For Local Systems, this would be your Field Technician. For Systems Planning, this would be the Grant Manager and the Plan Review and Contract Support Specialist. The Administering Team will mark up the document and/or provide feedback on any changes necessary. See the [Producing a PDF of the Change Order](#) section for guidance on producing the change order “report” to send to the Administering Team.



The screenshot shows the Appia interface for a Change Order. The breadcrumb trail is "Projects / 08-C008-089 / Change Orders / Change Order #2". The main header displays "08-C008-089" with a red "Under Construction" tag. Below this, it shows "FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023". On the right side, there are three buttons: "Submit for Approval" (with a red 'X' over it), "Actions", and "Reports". Below the header, the title "Change Order" is displayed with an "Edit" button. A table below shows the following data:

Date Created	Status
01/12/2024	Draft

Below the table, the word "Summary" is visible, followed by the word "Type".

Step 2: Correspond with the Administering Team and make the requested changes. Send another draft copy of the PDF with all changes incorporated to the Administering Team for their final “ok”. Once all edits have been made and the Administering Team has approved the draft copy, click the blue “Submit for Approval” button near the top, right corner of the screen. You then have two options for approval: “Submit in Appia” or “Submit to Doc Express”. Choose the “Submit in Appia” option. This will change the status of the change order to “Pending”.

Projects / 08-C008-089 / Change Orders / Change Order #2

08-C008-089 Under Construction
FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

Submit For Approval Actions Reports

Submit in Appia
Submit to Doc Express

Edit

Change Order

Date Created	Status
01/12/2024	Draft

Summary	Type
---------	------



Projects / 08-C008-089 / Change Orders / Change Order #2

08-C008-089 Under Construction
FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

Approve Actions Reports

Change Order

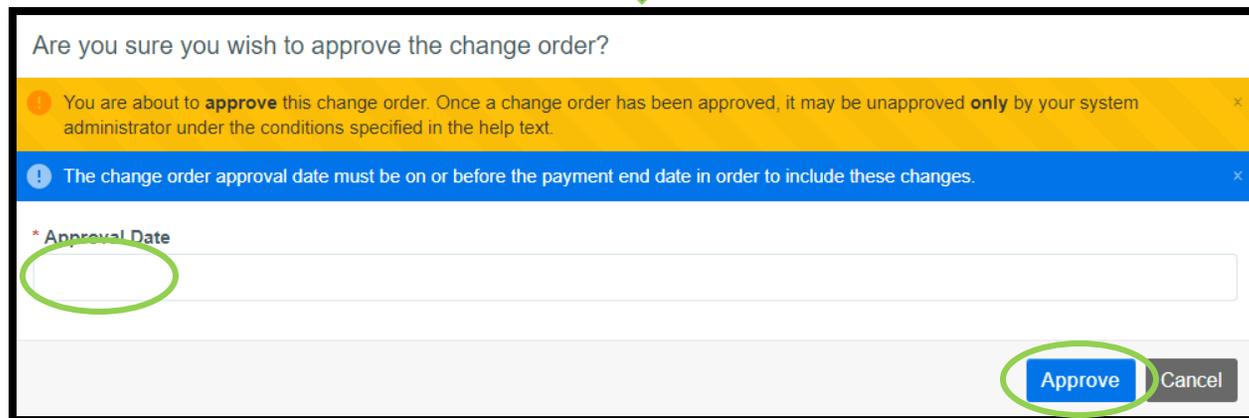
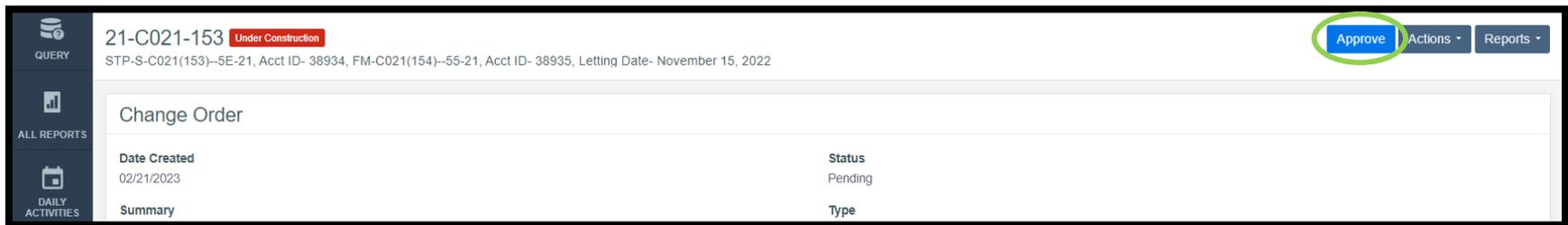
Date Created	Status
01/12/2024	Pending

Summary	Type
---------	------

Note: Once the change order is in “Pending” status, items within it can be posted in an Item Posting in Daily Reports.

Step 3: Generate a new PDF of the change order document following the steps in Section [D. Producing a PDF of the Change Order](#). Upload this “Pending” status change order to Doc Express for all parties’ signatures.

Step 4: Once all signatures have been applied in Doc Express and the document has been transitioned to ‘Completed’ status, click the “Approve” button near the top, right corner of the change order screen. You will be prompted to add the Approval Date. The Approval Date is the date the change order was transitioned to “Completed” in Doc Express. After entering the Approval Date, click on the blue Approve button. This will change the status of the change order to “Approved”.



21-C021-153 Under Construction Undo Approval Reports

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Change Order

Approval Date 02/08/2023	Status Approved
Summary	Type

Step 5: Your change order has now been finalized. Change order items will now be available for incorporation into Payments.

2) Submitting Change Orders for Approval Using the Doc Express Integration

Note: In order to submit a change order for approval using the method described in this section, the Appia project must be integrated with the associated Doc Express Contract. If you have not enabled that integration yet, you will need to do so. Please see the [Integrating Appia with Doc Express for Submittals](#) section.

Note: For county FM projects let on or after January 2024, in order to make the automated process work, the “CPS Contractor Pay Finance” user must be added to the project, and the API Access for this user must be toggled “On”. If “CPS Contractor Pay Finance” is not currently a user in the project, or if that user’s API Access is not toggled “On” in the default/global user list, address those issues before proceeding. See the Default Settings: Users – Adding/Deleting, Roles, Project Access, Licenses and the Project Settings sections in the [Appia Project Creation & Account Management Instructions](#) for guidance on adding the “CPS Contractor Pay” user and on the API Access toggle.

Step 1: When all of the necessary and pertinent information has been entered into the change order, send a PDF of the DRAFT change order to the Administering Team. For highway and bridge projects, this would be your Local Systems Regional Field Technician (or Discretionary Grant/Earmark Technician, if applicable). For non-highway and bridge projects, this would typically be the Grant Manager and the Plan Review and Contract Support Specialist from the Local Systems Grant Team. The Administering Team will mark up the document and/or provide feedback on any changes necessary. See the [Producing a PDF of the Change Order](#) section for guidance on producing the change order “report” to send to the Administering Team.

21-C021-153 Under Construction
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Submit for Approval Actions Reports

Change Order Edit

Date Created	Status
02/21/2023	Draft

Summary	Type
---------	------

Step 2: Correspond with the Administering Team and make the requested changes. Send another draft copy of the PDF with all changes incorporated to the Administering Team for their final “ok”. Once all edits have been made and double-checked (don’t forget to override the line numbers on the new items to 8000 numbers!) and the Administering Team has approved the draft copy, the change order needs to be “Submitted for Approval”. For these automated change orders, “Approval” includes approvals in both Doc Express and Appia. To submit a change order for approval, click on the blue “Submit for Approval” button in the top, right corner. A pull-down menu will appear with two options: “Submit in Appia®” and “Submit to Doc Express®”. Click on the “Submit to Doc Express®” option.

Projects / 08-C008-089 / Change Orders / Change Order #1

08-C008-089 Under Construction

FM-C008(89)-55-08, Acct ID- 39638, Letting Date- March 12, 2023

Submit For Approval **Actions** **Reports**

Submit in Appia®
Submit to Doc Express®

Change Order Edit

Date Created 12/07/2023	Status Draft
Summary	Type Non-significant – Federal-Aid Participating
Description 8001- For automated payment process in Appia instructions	Total Proposed Amount \$6,000.00

Quantity Changes Edit

! No quantity changes found. ×

New Items Edit

Line Number	Item ID	Unit	Quantity	Unit Price	Extension
-------------	---------	------	----------	------------	-----------

Do NOT Approve the change order in Appia until it is transitioned to “Completed” in Doc Express as described on the following pages!

A pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. The Change Order drawer is appropriate for change orders.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this change order. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this change order

Select

Select required type(s)

No types

Submit Cancel

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this change order. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this change order

Select

Change Order

Contract Documents

Estimates and Vouchers

Project Closeout

Weekly Reports

Submit Cancel

Once the Change Order drawer is selected, the type will automatically populate. Click the blue “Submit” button in the lower, right corner.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this change order. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this change order

Change Order

Select required type(s)

× Change Order

Submit Cancel

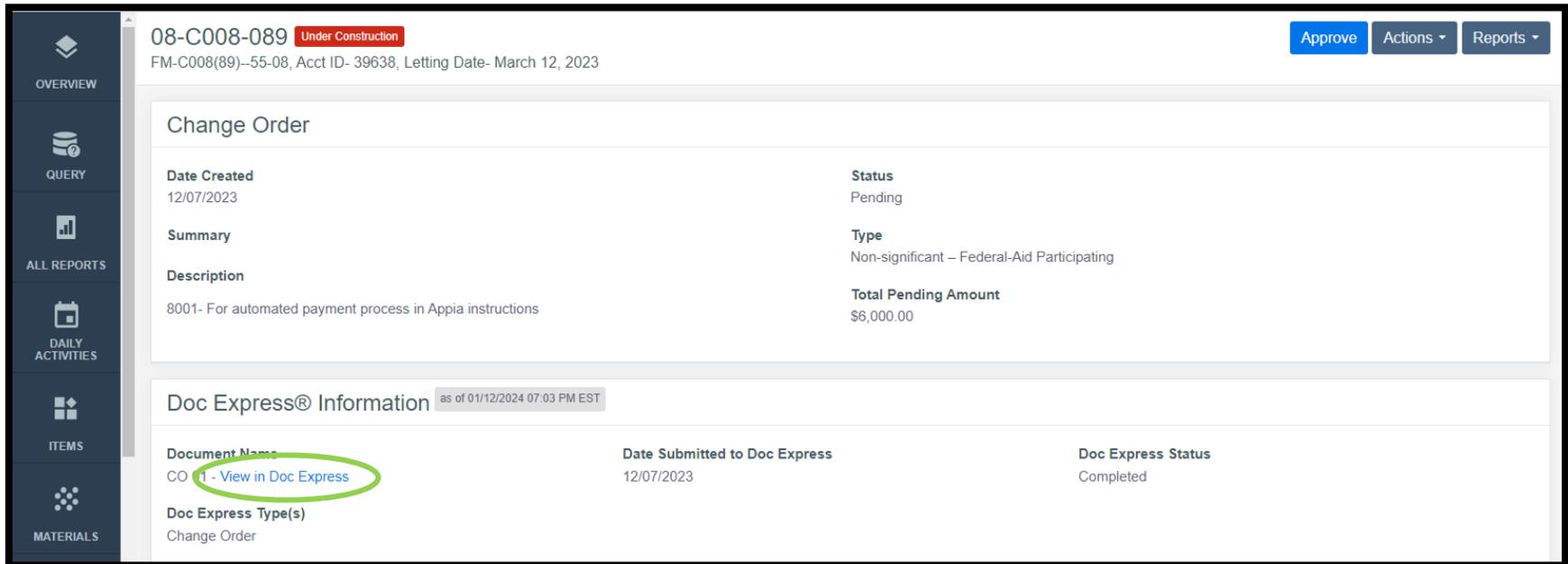
You will be returned to the change order. A green ribbon should appear across the top of the screen saying, "The change order has been submitted for approval successfully." and "The change order report has been sent to Doc Express® successfully.". Additionally, the Doc Express® Information now shows for the change order, including the Document Name, Date Submitted to Doc Express, Doc Express Status, and Doc Express Type(s).

The screenshot displays a software interface for managing change orders. At the top, a green banner contains the following text: "The change order has been submitted for approval successfully. The change order report has been sent to Doc Express® successfully." Below this, a blue banner indicates the user is logged in as "Iowa Local Systems - DEMO ACCOUNT" and offers a "Switch to another business?" option. The main content area shows the details for "Change Order #1" (ID: 08-C008-089), which is currently "Under Construction". Key details include: Date Created: 12/07/2023; Status: Pending; Type: Non-significant - Federal-Aid Participating; Description: 8001- For automated payment process in Appia instructions; Total Pending Amount: \$6,000.00. The "Doc Express® Information" section, highlighted with a green oval, shows: Document Name: change_order-1-20231207 - View in Doc Express; Date Submitted to Doc Express: 12/07/2023; Doc Express Status: Submit; Doc Express Type(s): Change Order. At the bottom, a table titled "New Items" is partially visible, with columns for Line Number, Item ID, Unit, Quantity, Unit Price, and Extension. The first row of the table is for "Section: 0001 - FM-C008(89)--55-08, Acct ID- 39638, ITEMS FOR A TWIN 12' X 9' X 50'-0 REINFORCED CONCRETE BOX CULVERT".

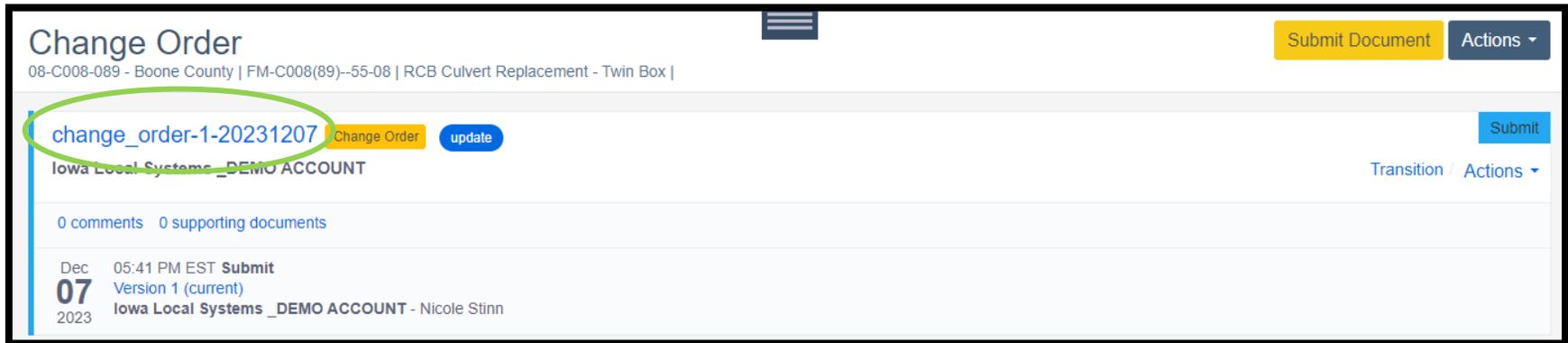
At this point, the document needs to be signed and transitioned in Doc Express by the appropriate people (engineer, PIRC, etc.). Navigate to Doc Express to complete the transition and signature process. You can navigate to Doc Express by either opening a new browser tab and going to the Doc Express website, by clicking on the four-square box in the upper, right corner of the Appia screen and selecting Doc Express, or by clicking on the View Doc Express link found in the Doc Express Information section on the Change Order screen in Appia.



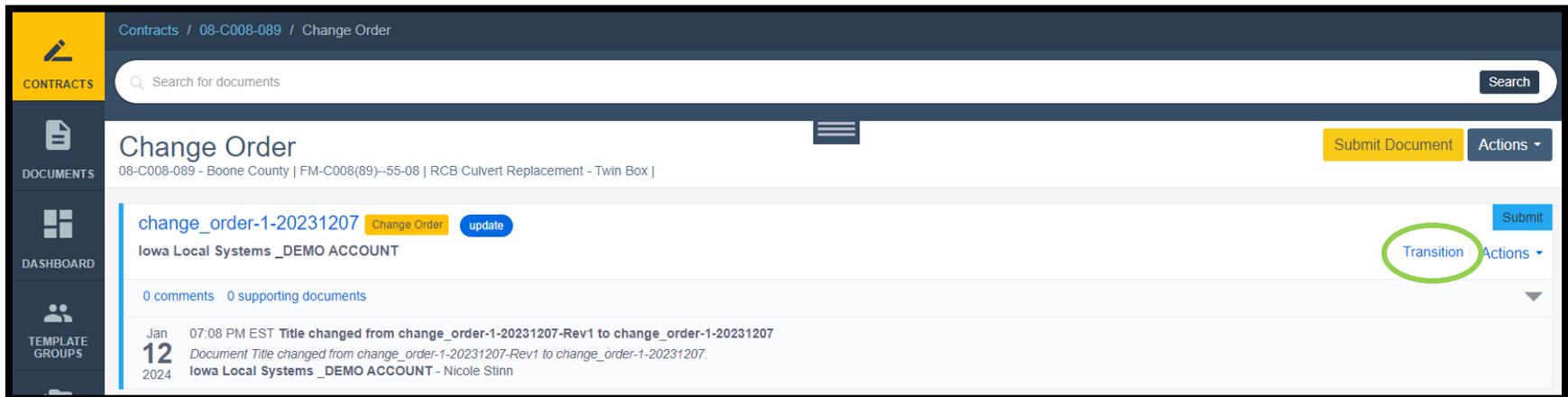
or



Once in Doc Express, select the appropriate contract and the appropriate drawer for the change order being submitted. The change order will show with a name similar to the one shown in the screenshot below. Do NOT update the name of the document.



The appropriate person should now transition the change order. To do so, click on the blue “Transition” text on the right end of the line containing the document.



A pop-up box will appear with a pull-down menu to choose the “Status” and a Comment field. Select the appropriate status from the pull-down menu. The use of the Comment field is optional.

Change Order

Transition CO 01

*** Status**

Comment

Supporting Documents
[Add a supporting document?](#)

Change Order

Transition CO 01

*** Status**

Comment

Supporting Documents
[Add a supporting document?](#)

If a Status is selected that requires a signature, a box will automatically appear that says, "Sign this document".

The screenshot shows a software window titled "Transition CO 01" with a red close button in the top right corner. The form contains the following elements:

- Status:** A dropdown menu with the selected value "Recommended by Engineer / Approved".
- Comment:** A large empty text area for entering a comment.
- Supporting Documents:** A section with the text "Supporting Documents" and a blue link "Add a supporting document?".
- Sign this document:** A large, semi-transparent white box with a grid pattern and the text "Sign this document" in a large, light gray font.
- Checkboxes:**
 - An unchecked checkbox with the text: "By checking this box and entering my name above, I am electronically signing the attached document."
 - An unchecked checkbox with the text: "Transition document to final status of **Completed**?"
- Buttons:** A yellow "Save" button and a gray "Cancel" button.

Sign the document by typing your name into the “Sign this document” box and check the box by the signature acknowledgment box. Signatures should ONLY be applied by the person with the authority to approve payments (the project engineer and/or the PIRC).

IF no additional signatures are needed in the workflow (county FM-only projects), check the box for “Transition document to final status of Completed?”. If additional signatures are needed (all projects except county FM-only projects), leave this box un-checked. Then click the yellow “Save” button in the lower, right corner of the box.

Check this box if no further signatures are required on the document. Otherwise, leave it un-checked.

Transition CO 01

* Status
Recommended by Engineer / Approved

Comment

Supporting Documents
[Add a supporting document?](#)

Nicole Stinn

By checking this box and entering my name above, I am electronically signing the attached document.

Transition document to final status of Completed?

Save Cancel

The new status should now show on the right end of the line containing the document. If this status is “Completed”, you are ready to return to the Payment in Appia. If not, the appropriate person/people should transition the document until it reaches the “Completed” status.

For county projects let on or after January 2024 using the automated process, change orders will NOT transmit to the Finance Bureau unless the Doc Express status is “Completed”! Do NOT Approve the change order in Appia until it is transitioned to “Completed” in Doc Express!

Will not be sent to Finance!

This screenshot shows a 'Change Order' document in Appia. The document ID is CO 01, titled 'Iowa Local Systems _DEMO ACCOUNT'. The status is 'Recommended by Engineer / Approved', which is circled in red. A red callout box points to this status with the text 'Will not be sent to Finance!'. The document was last updated on Dec 05:55 PM EST. There are 0 comments and 0 supporting documents. Buttons for 'Submit Document' and 'Actions' are visible at the top right.

This screenshot shows the same 'Change Order' document in Appia, but the status is now 'Completed', which is circled in green. The document was last updated on Dec 05:59 PM EST. There are 0 comments and 0 supporting documents. Buttons for 'Submit Document' and 'Actions' are visible at the top right.

Once the document has been transitioned to a Completed status, navigate back to the change order in Appia. The Doc Express Status shown should now say "Completed". If the status did not update, refresh the browser page.

Projects / 08-C008-089 / Change Orders / Change Order #1

08-C008-089 Under Construction Approve Actions Reports

FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

Change Order

Date Created 12/07/2023	Status Pending
Summary	Type Non-significant – Federal-Aid Participating
Description 8001- For automated payment process in Appia instructions	Total Pending Amount \$6,000.00

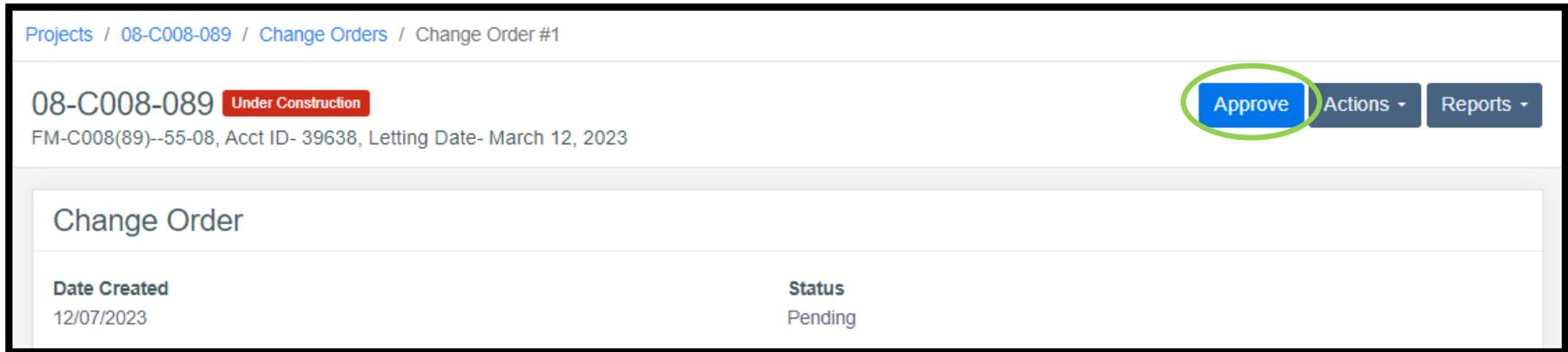
Doc Express® Information as of 12/07/2023 06:01 PM EST

Document Name CO 01 - View in Doc Express	Date Submitted to Doc Express 12/07/2023	Doc Express Status Completed
Doc Express Type(s) Change Order		

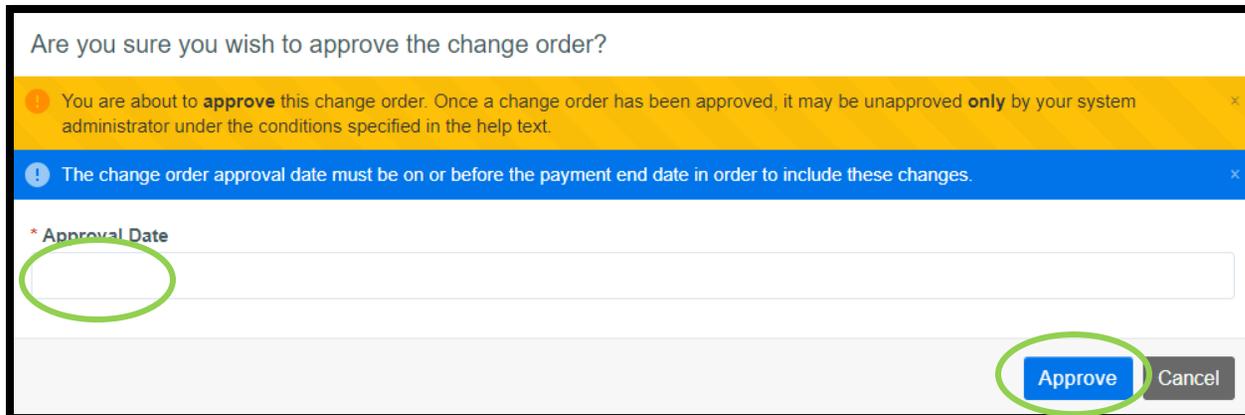
New Items

Line Number	Item ID	Unit	Quantity	Unit Price	Extension
Section: 0001 - FM-C008(89)--55-08, Acct ID- 39638, ITEMS FOR A TWIN 12' X 9' X 50'-0 REINFORCED CONCRETE BOX CULVERT					
8001	2402-2720100	CY	60.000	\$100.000	\$6,000.00
EXCAVATION, CL 20, RDWY PIPE CULV					

Once the Doc Express status of “Completed” is showing in the change order and you are SURE the change order is ready to be submitted to the Finance Bureau for processing, click on the blue “Approve” button in the upper, right corner of the Change Order screen.



Enter the Approval Date in the pop-up box that appears. The Approval Date is the date the change order was transitioned to Completed in Doc Express. Then click on the blue Approve button.



For contracts let in January 2024 or later, clicking “Approve” WILL send the change order to Finance. Do NOT email the change order report to the DOT.LocalSystems@iowadot.us email address also. Emailing the change order will cause confusion and errors. If you do not receive any communications to the contrary, YOUR CHANGE ORDER WENT THROUGH SUCCESSFULLY.

11 - Punch List

(Reserved for Punch List instructions)

This section is reserved for future instruction on using the Punch List tab.

12 - Payments

To access the Payments section, click on the Payments button in the left menu.

The screenshot displays a software interface for project management. On the left is a dark sidebar with navigation options: TIME LIMITS, CHANGE ORDERS, FORCE ACCOUNTS, PUNCH LIST, **PAYMENTS** (highlighted with a red circle), CONTRACTORS, and FUNDING. The main content area shows an 'Overview' for project '08-C008-089' (Under Construction), with details for 'Project', 'Location', and 'Management'. On the right, there are summary cards for 'Awarded Amount', 'Authorized Amount', and 'Approved Changes', along with an 'Amount Paid' section showing 0% completion for awarded, authorized, and approved payments.

08-C008-089 Under Construction
FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

Overview Edit

General Information

Project
Work Type
RCB CULVERT REPLACEMENT - TWIN BOX

Location
Location
On 150TH ST, Over TRIB. OF SQUAW CREEK, S36 T85 R25

Management
Prime Contractor
DIXON CONSTRUCTION CO.
Created By
Douglas Heeren

Awarded Amount \$517,966.75

Authorized Amount \$517,966.75

Approved Changes \$0.00

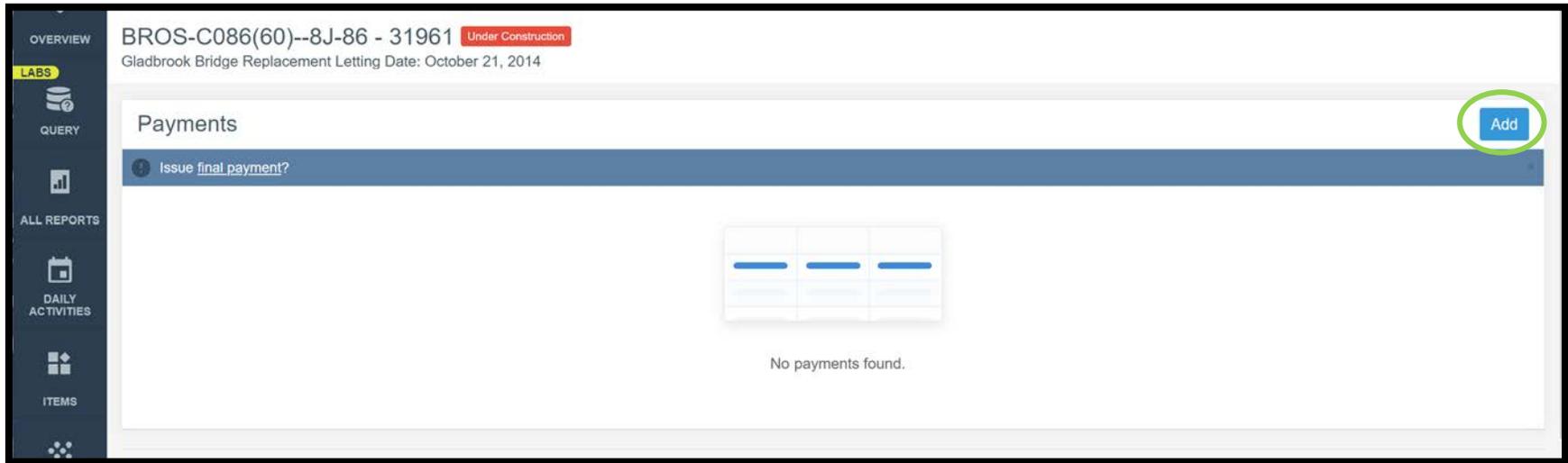
Description
FM-C008(89)--55-08, Acct ID- 39638,
Letting Date- March 12, 2023

Amount Paid

Amount paid so far	0% of your Awarded \$517,966.75	0% of your Authorized \$517,966.75	0% of your Approved Payments \$0.00
--------------------	---------------------------------	------------------------------------	-------------------------------------

Important Dates

When Payments has been selected and no payments have been made to date, the following screen will appear. Click on the blue “Add” button in the top, right corner to prepare a payment for processing.



If other payments have been made to date, the previous payments and their statuses will be shown on a listing on this screen. Click on the blue “Add” button in the top, right corner to prepare a payment for processing.



When a new payment is added, or an existing payment is opened for editing, the following screen will appear. There are five tabs across the top: Overview, Summary, Work Performed, Stockpiles (if stockpiled materials are being paid in the payment) and Attachments. A sixth Exclusions tab will show if any Daily Reports are being excluded from the payment.

A. Overview Tab

Some information is automatically populated, but the “From”/”To” Dates, the Retainage information, the Approval Date, the Payment Date, and any additional Remarks must be entered by the user.

- From/To Dates: Be sure to enter a date range which covers only items that have certifications unless the quantity for a non-certified item has been adjusted to 0.00 as explained in the [Entering Item Posting for Items Without Certifications or Without Certified Payrolls](#) subsection of these instructions.
 - Note: The “To Date” date will populate with the day the payment is created. If you do not complete the payment the day you create it and you wish to go back later and add coverage for work on additional days, you will need to adjust the To Date.
- Retainage – Retain: **For the first payment on any contract, make sure to enter the retainage percentage (3.000% for projects using Iowa DOT Standard Specifications).** (This percentage will then stay there for future payments and will not have to be input every time.)
- Retainage – Release: This should be kept at \$0.00 until approval has been given by Local Systems to release the retainage. This will generally happen after a project has been reviewed/audited or the review has been waived or when a contractor requests an early retainage release.
 - Note: For projects using a standard payment for the final payment, when generating a final payment report, the payment process described here will be used, and retainage will be released using this field. Appia’s final payment will NOT be used as the final payment for DOT administered projects. For further guidance on using a standard payment for the final payment, see the [Standard Payment for Final Payment](#) section. For guidance on determining which final payment process to use, see the [Making a Final Payment](#) section.
- Approval Date: Enter the date that the payment was approved.
- Payment Date: This is the date the payment was processed, either by your local agency for reimbursement projects or by the DOT for projects paid from the Farm-to-Market account. **Do NOT enter a payment date until you know the payment has been processed successfully**, and the processed payment matches your Appia payment report. The payment can be approved before entering a payment date.
- Remarks: Enter any relevant remarks or explanations to accompany the payment report. The remarks section should especially contain the words “Semi-Final Payment” or “Final Payment” for those respective payments.

Once all of the appropriate fields have been filled out, click the blue “Save” button in the top, right corner.

OVERVIEW EXCLUSIONS SUMMARY WORK PERFORMED STOCKPILES ATTACHMENTS

1 daily report has been excluded from payment. See the [Exclusions section](#) for details.

Edit

Save Cancel

Payment Details		Project Details	
Payment Number	2	Prime Contractor	DIXON CONSTRUCTION CO.
Percent Complete	9.0%		
Payment Status	Draft		
Item Payment Amount	\$29,500.00		

Pay Period		Payment Dates	
* From Date	10/05/2023	* To Date	01/12/2024
		Approval Date	
		Payment Date	

Retainage		Retainage Cap Amount
Retain	3.000%	\$30,000.00
Release	\$0.00	Edit Project Cap Settings

Remarks

14px B I U [Text Alignment Icons] [List Icons] A

B. Exclusions of Daily Reports from Payments

If the From/To Date range of the payment includes Daily Reports which have not been approved, a yellow ribbon will appear across the top of the Overview screen. To view which reports have been excluded, click on either the “Exclusions section” link in the yellow ribbon or the “Exclusions” tab across the top.

The screenshot displays a software interface for managing a project. At the top, the project name is "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". Below this, the location and letting date are shown: "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A navigation bar includes tabs for "OVERVIEW", "EXCLUSIONS", "SUMMARY", "WORK PERFORMED", and "ATTACHMENTS". A yellow banner at the top of the main content area contains a notification: "2 daily reports have been excluded from payment. See the Exclusions section for details." The "EXCLUSIONS" tab and the "Exclusions section" link are circled in green. Below the banner is an "Edit" form with "Save" and "Cancel" buttons. The form is divided into several sections: "Payment Details" (Payment Number: 2, Percent Complete: 3.6%, Payment Status: Draft, Item Payment Amount: \$44,608.40), "Project Details" (Prime Contractor: PETERSON CONTRACTORS INC., Project Manager: Nicole Stinn, Managing Office: Tama County Highway Department), "Pay Period" (From Date: 01/03/2019, To Date: 01/28/2019), "Payment Dates" (Approval Date and Payment Date fields), and "Retainage" (Retain: 3.000%, Retainage Cap Amount: \$30,000.00). A "Help" button is located at the bottom right of the form.

Any Daily Reports being excluded from the payment will be shown. You will be able to see their status showing they have not yet been approved. Daily Reports will be excluded if they are in either Draft or Pending status. If a Daily Report has been excluded, it means that payment will not be made on any item postings (quantity entries) made that day.

OVERVIEW BROS-C086(60)--8J-86 - 31961 Under Construction Submit For Approval Actions

LABS Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW **EXCLUSIONS** SUMMARY WORK PERFORMED ATTACHMENTS

Excluded Daily Reports

Date	Inspector	Status	Remarks	Posted Amount
01/22/2019	Nicole Stinn	Draft	spoke with Kenny (PCI Foreman) on the phone this morning. They are running into a lot of water in the hole they dug for the pier pilings. Kenny will call me this afternoon and let me know their progress and if they plan to try driving any piling. Kenny did ask if it would be ok to start settin...	\$0.00
01/28/2019	Nicole Stinn	Draft	Today PCI poured the remaining 5 encasements. They stripped the other 6 piles and wrapped them in plastic to keep the moisture in and then wrapped them in blankets to keep them warm. The 1st truck arrived at 1:30. I tested this trucks concrete. The air was at 6.5% and the slump was at 4". 18 1/4 ...	\$6,849.00

Displaying all 2 daily reports

If you intended to leave the Daily Report in Draft/Pending status so as not to pay for an item (in the case of missing certs, missing or incorrect payrolls, or for other reasons), simply leave that Daily Report excluded and do nothing on this screen.

If you intended to include items on the excluded reports in the payment you are working on, you can click on the date of the Daily Report in blue on the left side to be taken directly to the Daily Report to submit it for approval. Once approved, you will need to navigate back to the Payments tab to finish inputting/reviewing the payment. Once an excluded report has been approved, you will see that the Payments tab updates so that it no longer shows as an exclusion.

C. Summary Tab

The Summary tab simply shows a breakdown of components which are being paid. There is nothing you need to enter/adjust on this tab.

OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

BROS-C086(60)--8J-86 - 31961 Under Construction

Gladbrook Bridge Replacement Letting Date: October 21, 2014

[Submit For Approval](#) [Actions](#)

OVERVIEW
EXCLUSIONS
SUMMARY
WORK PERFORMED
ATTACHMENTS

Save Cancel

Adjustment

Adjustment Remarks

	Previous	Current	To Date
Credits			
Authorized Work	\$7,565.00	\$44,608.40	\$52,173.40
Stockpile Advancement	\$0.00	\$0.00	\$0.00
Reductions			
Stockpile Recovery	\$0.00	\$0.00	\$0.00
Retainage	\$226.95	\$1,338.25	\$1,565.20
Liquidated Damages	\$0.00	\$0.00	\$0.00
Payment			
Adjustment	\$0.00	\$0.00	\$0.00
Retainage Released	\$0.00	\$0.00	\$0.00
Totals	\$7,338.05	\$43,270.15	\$0,608.20

Help

D. Work Performed Tab

The “Work Performed” tab shows a listing of each item for which payment is being made as part of this payment. You can toggle between a “dollars” view or a “quantity” view by using the “In dollars?” toggle. You should verify that all information looks correct in this tab, but there is nothing for you to enter/adjust.

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES ITEMS MATERIALS STOCKPILES TIME LIMITS

BROS-C086(60)--8J-86 - 31961 Under Construction Submit For Approval Actions

Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW EXCLUSIONS SUMMARY **WORK PERFORMED** ATTACHMENTS

Work Performed In dollars? YES

Line Number	Item ID	Unit	Authorized	Previous	Current	Overages	Insufficient
Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE							
0010	2104-2710020	CY	\$25,650.00	\$0.00	\$4,800.00		
EXCAVATION, CL 10, CHANNEL							
0130	2501-0201473	LF	\$60,799.20	\$0.00	\$30,399.60		
PILES, STEEL, HP 14 X 73							
0140	2501-5478073	LF	\$30,135.60	\$0.00	\$8,218.80		
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73							
Displaying all 3 items							
Section: 2 - ROADWAY ITEMS							
0420	2526-8285000	LS	\$11,900.00	\$1,190.00	\$1,190.00		
CONSTRUCTION SURVEY							
Displaying 1 item							

If payment is being made on a quantity that exceeds the item’s authorized quantity (contract quantity + quantity authorized by change orders), a red circle with a check mark will appear to the right of the item’s line. **If there is an overage, you should check to make sure it does not exceed the \$50,000 threshold that necessitates a change order. If it does exceed \$50,000 in overage, you must process a change order before proceeding with payment on the full quantity for that item.**

The screenshot shows a software interface for project management. At the top, the project is identified as 'BROS-C086(60)--8J-86 - 31961' with a status of 'Under Construction'. The 'Work Performed' tab is selected and highlighted with a green circle. Below the tab is a table with the following data:

Line Number	Item ID	Unit	Authorized	Previous	Current	Overages	Insufficient
Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE							
0010	2104-2710020	CY	\$25,650.00	\$0.00	\$4,800.00		
EXCAVATION, CL 10, CHANNEL							
0130	2501-0201473	LF	\$60,799.20	\$0.00	\$30,399.60		
PILES, STEEL, HP 14 X 73							
0140	2501-5478073	LF	\$30,135.60	\$0.00	\$31,048.80		
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73							
Displaying all 3 items							
Section: 2 - ROADWAY ITEMS							
0420	2526-8285000	LS	\$11,900.00	\$1,190.00	\$1,190.00		
CONSTRUCTION SURVEY							
Displaying 1 item							

Note: The “Item Overruns” report in the “All Reports” tab may be helpful in identifying items with overages as well.

E. Stockpiles Tab

Any desired attachment can be added to your payment.

Projects / 08-C008-089 / Payments / Payment #2 / Stockpiles

08-C008-089 Under Construction Submit For Approval Actions

FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023

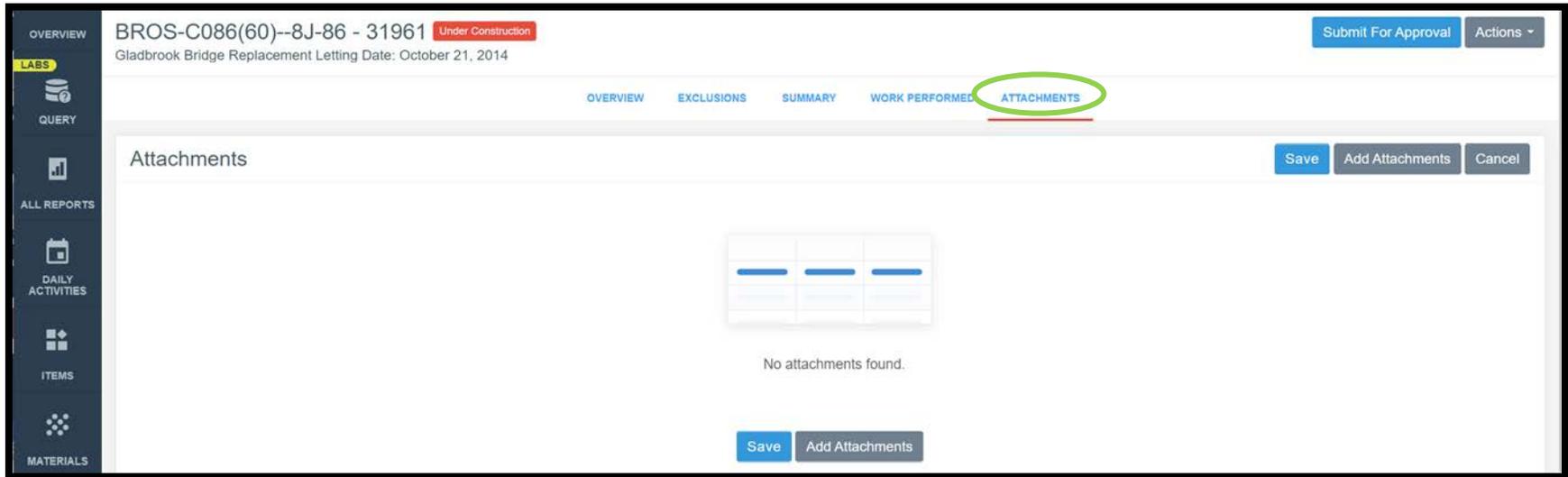
OVERVIEW EXCLUSIONS SUMMARY WORK PERFORMED **STOCKPILES** ATTACHMENTS

Stockpile Details

Stockpile	Advancement	Advancement To Date	Recovery	Recovery To Date
#1 2404-7775000 REINFORCING STEEL	\$20,000.00	\$20,000.00	\$0.00	\$0.00
Totals	\$20,000.00	\$20,000.00	\$0.00	\$0.00

F. Attachments Tab

Any desired attachment can be added to your payment.



Just click on the gray "Add Attachments" button and drag and drop the desired file or choose the file by navigating to the location on your computer or device where the attachment is saved.



G. Approving & Submitting a Payment – FOR CITY, COUNTY NON-FM, & COUNTY FM PROJECTS LET PRIOR TO JANUARY 2024

Reimbursement Projects

City Projects & County Projects NOT on the Farm-to-Market System

City projects and county projects not on the Farm-to-Market system are reimbursement-style projects. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

For reimbursement-style projects, PDF payment reports are created and are uploaded to Doc Express. Then, a reimbursement request is submitted to the Administering Team using the appropriate Claim for Reimbursement form. (See [I.M. 6.110, Attachment E](#) for links to the Claim for Reimbursement forms. See the section titled Estimates and Vouchers Drawer Documents.)

Also, for these projects, cities may take advantage of the Appia-Doc Express integration that allows for direct transmittal of documents from Appia to Doc Express and for the return of Doc Express transition statuses to Appia. However, the use of this integration is not required.

Contractor Payment System (CPS) Projects

County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024

For projects let prior to January 2024, payment reports for CPS projects (county projects on the Farm-to-Market system) are generated in Appia, placed in Doc Express, and then emailed to the Finance Bureau at DOT.LocalSystems@iowadot.us. These projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing.

Appia Auto-Pay Projects

County Projects ON the Farm-to-Market System LET JANUARY 2024 OR LATER

For county FM projects let on or after January 2024, this section is not applicable.

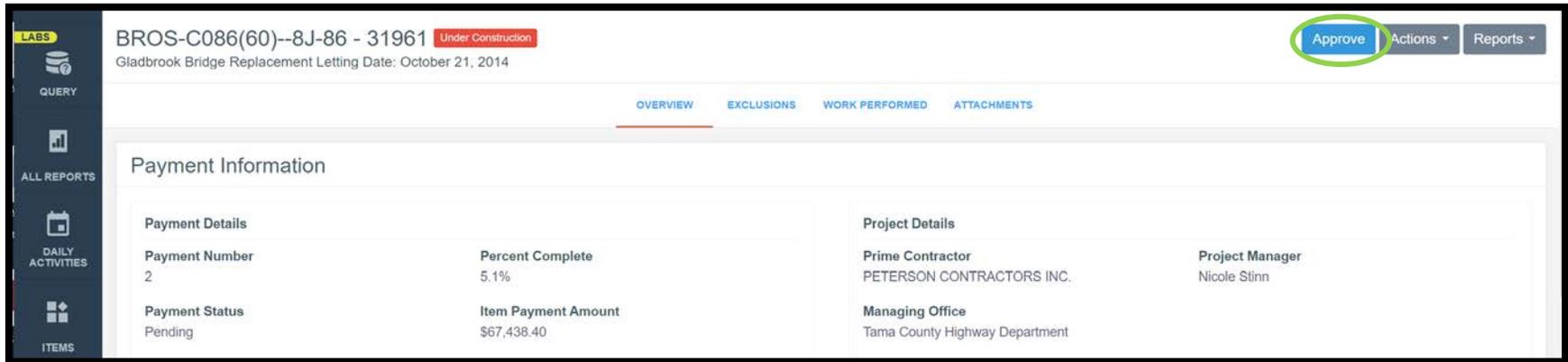
1) Submitting Payments for Approval

Note: Remember to enter 3% retainage on your first payment!

Once all of the information is entered for a payment and has been double-checked, the payment needs to be “Submitted for Approval” and then “Approved”. To submit a payment for approval, click on the blue “Submit for Approval” button in the top, right corner. A pull-down menu will appear with two options: “Submit in Appia®” and “Submit to Doc Express®”. Either option is acceptable for the projects subject to this section. However, the following guidance in this section assumes the “Submit in Appia®” option was chosen. For guidance on “Submitting to Doc Express®”, see the [Submitting Payments for Approval](#) section under the [County FM Projects LET ON OR AFTER JANUARY 2024](#) section.

The screenshot shows a software interface for managing payments. The top navigation bar includes 'OVERVIEW', 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', and 'TIME LIMITS'. The main content area displays 'Payment Information' for project '08-C008-089' (Under Construction). The 'Payment Details' section shows 'Payment Number 1', 'Payment Status Draft', 'Percent Complete 3.3%', and 'Item Payment Amount \$17,303.50'. The 'Project Details' section shows 'Prime Contractor DIXON CONSTRUCTION CO.'. The 'Pay Period' section shows 'From Date 09/25/2023' and 'To Date 10/04/2023'. The 'Retainage' section shows 'Retainage Percent 3.000%' and 'Retainage Cap Amount \$30,000.00'. In the top right corner, there is a blue 'Submit For Approval' button with a dropdown menu open, showing two options: 'Submit in Appia®' and 'Submit to Doc Express®'. The 'Submit For Approval' button and its dropdown menu are circled in green.

After the payment has been “Submitted for Approval” via “Submit in Appia”, an “Approve” button will appear for any person having a high enough role to do approvals. Click on the blue “Approve” button in the top, right corner to approve the payment.



2) [Uploading Payment to Doc Express for Signatures](#)

Using the [Naming Convention](#) to determine the appropriate drawer and file name, upload a PDF of the approved payment to Doc Express for signatures. See the [Generating a Payment Report](#) section for guidance on producing the appropriate PDF payment report.

3) [Making a Progress Payment](#)

Reimbursement Projects

City Projects & County Projects NOT on the Farm-to-Market System

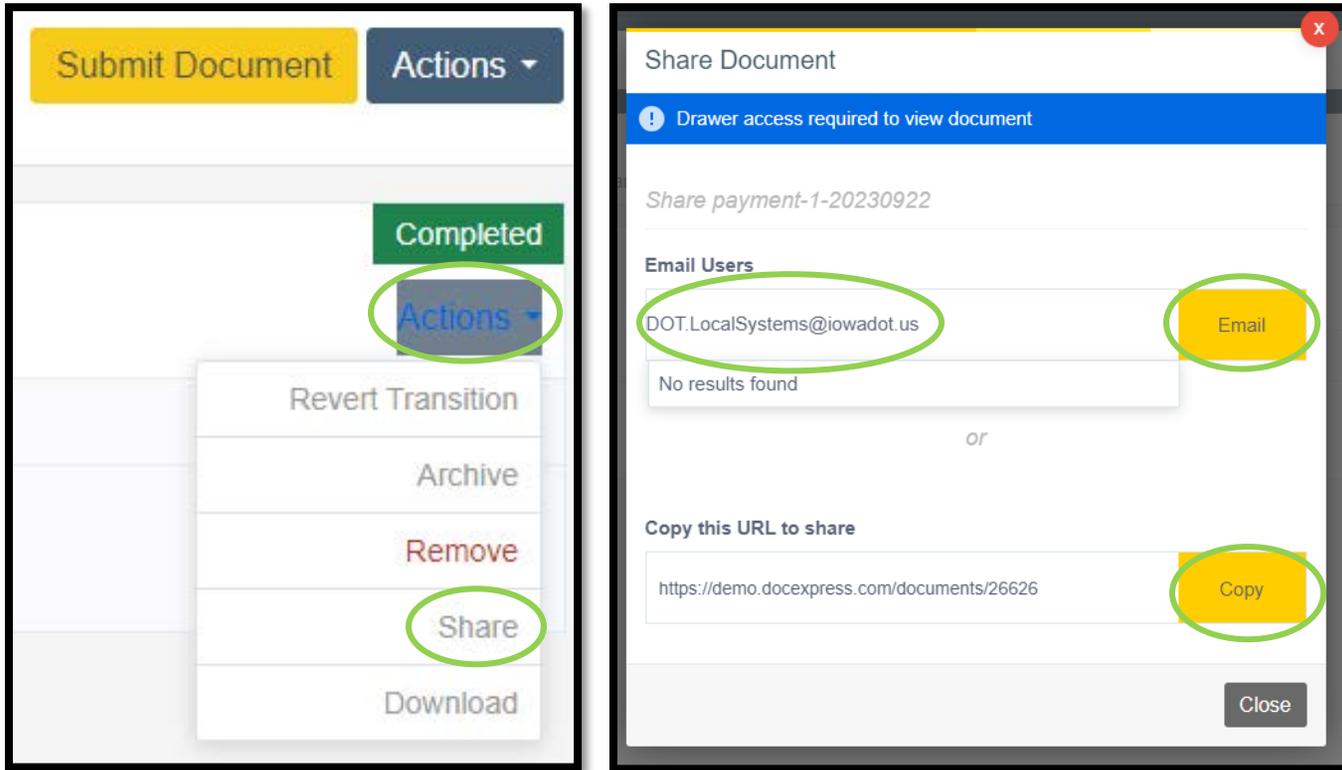
Once the payment report is signed in Doc Express, create a claim/invoice locally. Once the claim has been paid locally, submit a reimbursement request to the Administering Team using the appropriate Claim for Reimbursement form. (See [I.M. 6.020](#) for links to the Claim for Reimbursement forms.)

Contractor Payment System (CPS) Projects

County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024

Send the Doc Express signed payment report to the Finance Bureau at DOT.LocalSystems@iowadot.us. Submittal can be done in one of two ways.

- Download the signed payment report from Doc Express, save it to your device, and attach it in the email submittal.
- Include a link to the payment report in the email submittal.
 - To do this, in Doc Express, on the right side of the line containing the payment report, click on the “Actions” pull-down, and select “Share”. A pop-up box will appear, either type in the DOT.LocalSystems@iowadot.us email address into the top line and click “Email” OR click “Copy” on the second line and then paste the link into the submittal email.



4) [Making a Final Payment](#)

When a local agency has completed the semi-final payment and after the Administering Team has audited/reviewed the project or waived the audit/review, it is time to move forward with processing a final payment.

Note: For county projects, a Board of Supervisors signature is required on the final payment. If a signature line has not been created for the Board already, please create it prior to creating the final payment report. See either the Default Settings or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for setting up signature lines on payment reports.

Two processes exist for generating a final payment.

1. Standard Payment Process: See the [Standard Payment for Final Payment](#) subsection for guidance.
2. Appia's Final Payment Process: See the [Appia's Final Payment Process – Including Balancing Change Order](#) or the [Appia's Final Payment Process – Without Balancing Change Order](#) subsection, whichever is applicable.

Please refer to the guidance below for the appropriate final payment option.

Reimbursement Projects

City Projects & County Projects NOT on the Farm-to-Market System

May use either the Standard Payment Process or Appia's Final Payment Process (recommended)

Contractor Payment System (CPS) Projects

County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024

Use the Standard Payment Process only in order to avoid conflicts with the Contractor Pay System (CPS).

a) [Standard Payment for Final Payment](#)

Please see the [Standard Payment for Final Payment](#) section in the [Final Payment](#) section.

b) [Appia's Final Payment Process](#)

See the [Appia's Final Payment Process – Including Balancing Change Order](#) or the [Appia's Final Payment Process – Without Balancing Change Order](#) subsection, whichever is applicable.

H. [Approving & Submitting an Automated Payment – FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#)

Reimbursement Projects

City Projects & County Projects NOT on the Farm-to-Market System

City projects and county projects not on the Farm-to-Market System are reimbursement-style projects and are not applicable to this section. These projects do not get processed through the Contractor Pay System (CPS). Reimbursement-style projects will not follow the automated payment process and will not be transmitted directly to the Finance Bureau for processing. See section [Approving & Submitting a Payment – FOR CITY, COUNTY NON-FM, & COUNTY FM PROJECTS LET PRIOR TO JANUARY 2024](#) for guidance approving and submitting payments for cities.

Contractor Payment System (CPS) Projects

County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024

For county projects on the FM system let prior to January 2024, this section is not applicable.

Appia Auto-Pay Projects

County Projects ON the Farm-to-Market System LET JANUARY 2024 OR LATER

For projects let on or after January 2024, payments for CPS projects (county projects on the Farm-to-Market system) follow the automated payment process. These payments are generated in Appia, submitted to Doc Express via Appia, signed in Doc Express, updated in Appia, and sent directly to the Finance Bureau from Appia for processing.

1) Submitting Payments for Approval

Note: Remember to enter 3% retainage on your first payment!

Note: In order to submit a payment for approval using the method described in this section, the Appia project must be integrated with the associated Doc Express Contract. If you have not enabled that integration yet, you will need to do so. Please see the [Integrating Appia with Doc Express for Submittals](#) section.

Note: For county FM projects let on or after January 2024, in order to make the automated process work, the “CPS Contractor Pay Finance” user must be added to the project, and the API Access for this user must be toggled “On”. If “CPS Contractor Pay Finance” is not currently a user in the project, or if that user’s API Access is not toggled “On” in the default/global user list, address those issues before proceeding. See the **Default Settings: Users – Adding/Deleting, Roles, Project Access, Licenses and the Project Settings** sections in the [Appia Project Creation & Account Management Instructions](#) for guidance on adding the “CPS Contractor Pay” user and on the API Access toggle.

Once all of the information is entered for a payment and has been double-checked, the payment needs to be “Submitted for Approval”. For these automated payment projects, “Approval” includes approvals in both Doc Express and Appia. To submit a payment for approval, click on the blue “Submit for Approval” button in the top, right corner. A pull-down menu will appear with two options: “Submit in Appia®” and “Submit to Doc Express®”. Click on the “Submit to Doc Express®” option.

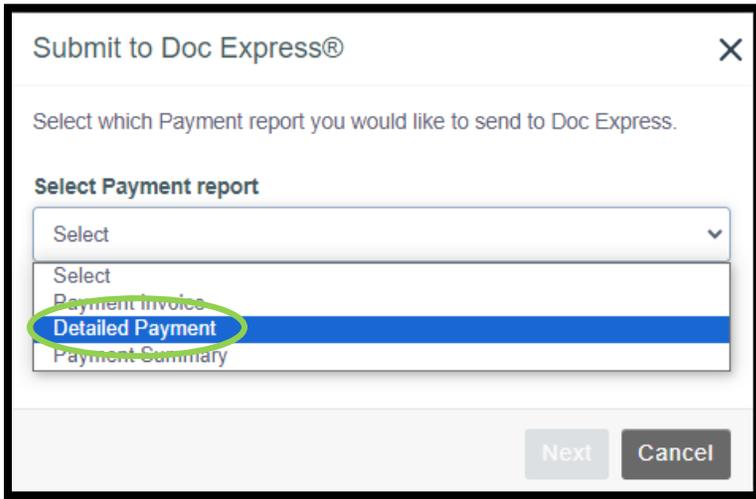
The screenshot displays the Appia software interface for a payment submission. The top navigation bar features a blue 'Submit For Approval' button and a dropdown menu with 'Submit in Appia®' and 'Submit to Doc Express®' options. The 'Submit to Doc Express®' option is highlighted with a green circle. The main content area shows 'Payment Information' for project 08-C008-089, which is 'Under Construction'. The 'Payment Details' section includes a table with the following data:

Payment Details	
Payment Number	1
Percent Complete	3.3%
Payment Status	Draft
Item Payment Amount	\$17,303.50

The 'Project Details' section shows the Prime Contractor as DIXON CONSTRUCTION CO. The interface also includes a sidebar with navigation options like 'OVERVIEW', 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', and 'ITEMS'.

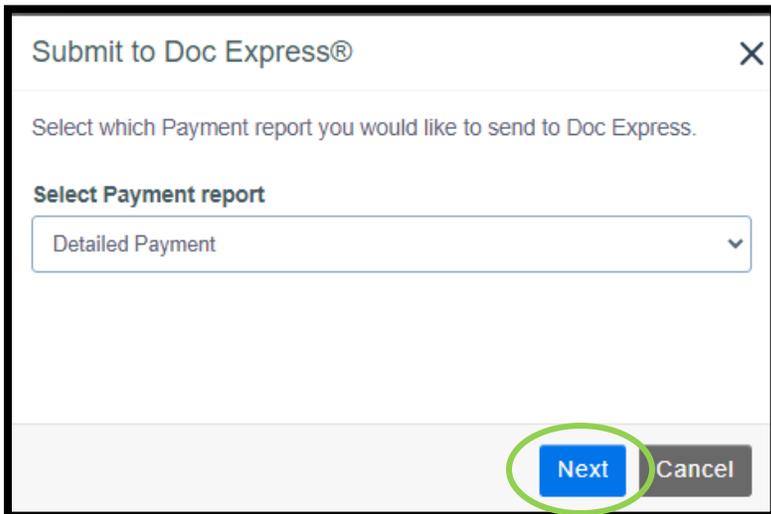
Do NOT Approve the payment in Appia until it is transitioned to “Completed” in Doc Express as described on the following pages!

A pop-up box will appear in which a payment report needs to be selected from the drop-down menu. Unless instructed otherwise by the Administering Team, always select the “Detailed Payment” report.



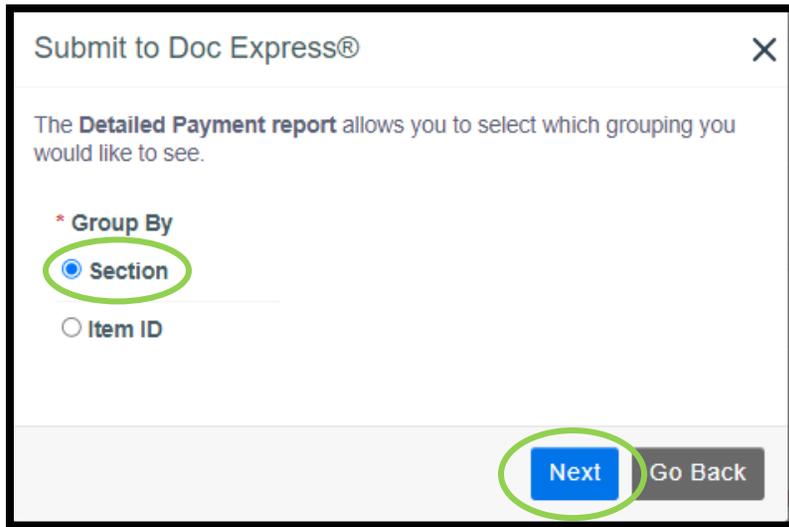
The screenshot shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title, there is a prompt: "Select which Payment report you would like to send to Doc Express." Underneath, the section "Select Payment report" contains a dropdown menu. The menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and a green circle. At the bottom right of the dialog, there are two buttons: "Next" (disabled) and "Cancel" (active).

When the appropriate report is showing in the “Select Payment report” line, click on the blue “Next” button in the lower, right corner of the box.



The screenshot shows the same "Submit to Doc Express®" dialog box. The dropdown menu now displays "Detailed Payment" as the selected option. The "Next" button at the bottom right is now highlighted with a green circle, indicating it should be clicked.

Another pop-up box will appear asking how the report should be grouped. Leave the Group By “Section” option selected. (This option keeps all of the bid items in order and groups them by project/division when a contract has more than one project/division.) Then, click the blue “Next” button in the lower, right corner of the box.



Submit to Doc Express®

The **Detailed Payment report** allows you to select which grouping you would like to see.

* Group By

Section

Item ID

Next Go Back

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection.

Submit to Doc Express® ✕

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Select ▼

Select required type(s)

No types

Submit to Doc Express® [X]

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Select

- Select
- Change Order
- Contract Documents
- Estimates and Vouchers**
- Project Closeout
- Weekly Reports

Submit Go Back

Submit to Doc Express® [X]

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Estimates and Vouchers

Select required type(s)

Select type(s)

- Project Closeout (Form 240011)
- Pay Estimate
- Proof of Payment to Contractor
- Progress Voucher**
- Stockpiled Materials

Note: Remember to reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. **Semi-final and final payments will go in a different drawer and have a different type than what is shown in the screenshots on this page.**

Once the correct drawer and type have each been selected from the pull-down menus, click on the blue “Submit” button in the lower, right corner of the box.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Estimates and Vouchers

Select required type(s)

× Progress Voucher

Submit Go Back

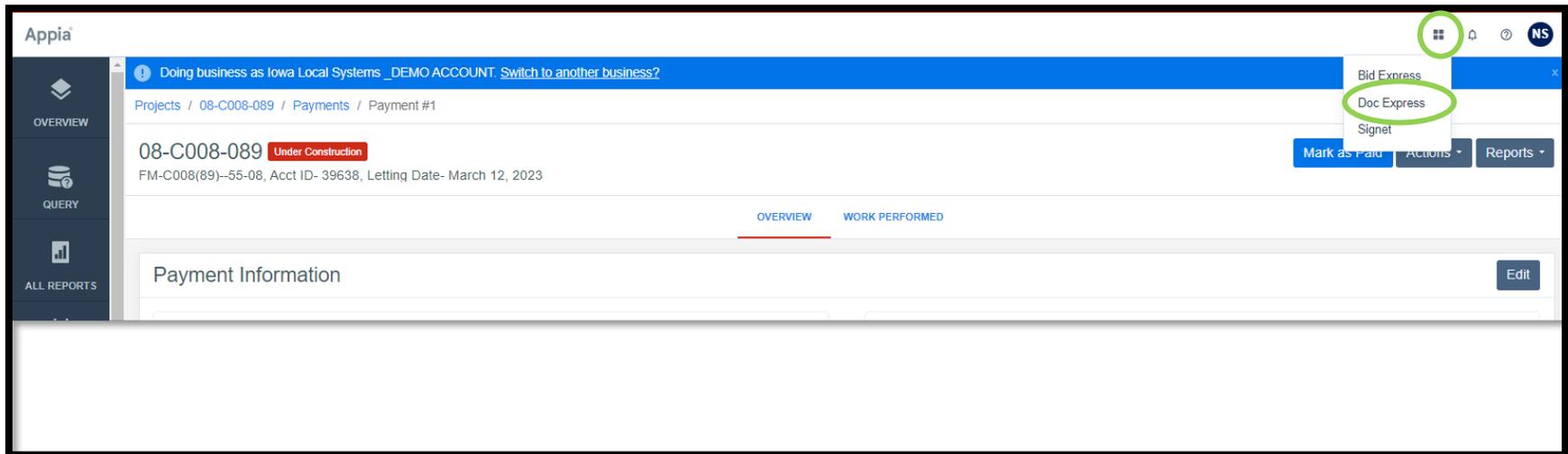
You will be returned to the Payment. A green ribbon should appear across the top of the screen saying, “The payment has been submitted for approval successfully.” and “The payment report has been sent to Doc Express® successfully.”. Additionally, the Doc Express® Information now shows for the payment, including the Document Name, Date Submitted to Doc Express, Doc Express Status, and Doc Express Type(s).

The screenshot displays a software interface with a green notification banner at the top stating: "The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully." Below this, a blue banner reads: "Doing business as Iowa Local Systems - DEMO ACCOUNT. Switch to another business?". The main content area shows the "Payment Information" for project "08-C008-089 Under Construction". It includes sections for "Payment Details", "Project Details", "Pay Period", and "Retainage". At the bottom, the "Doc Express® Information" section is highlighted with a green oval, showing the following data:

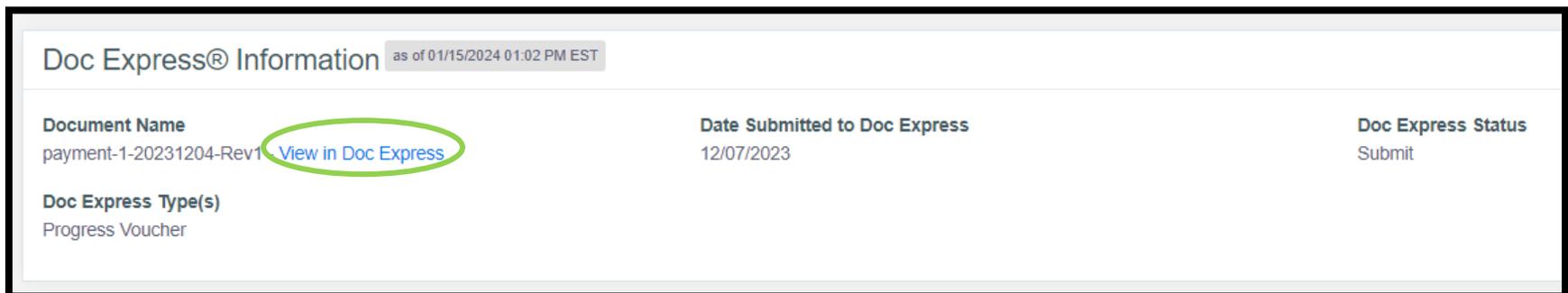
Document Name	Date Submitted to Doc Express	Doc Express Status
payment-1-20231204 - View in Doc Express	12/07/2023	Submit

Below the table, the "Doc Express Type(s)" is listed as "Progress Voucher".

At this point, the document needs to be signed and transitioned in Doc Express by the appropriate people (engineer, PIRC, etc.). Navigate to Doc Express to complete the transition and signature process. You can navigate to Doc Express by either opening a new browser tab and going to the Doc Express website, by clicking on the four-square box in the upper, right corner of the Appia screen and selecting Doc Express, or by clicking on the View Doc Express link found in the Doc Express Information section on the Payment overview screen in Appia.



Or



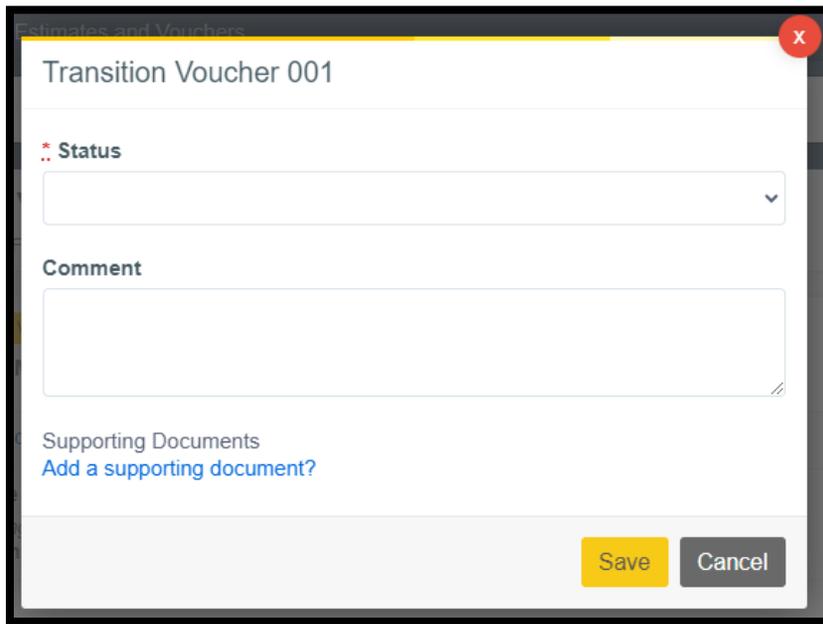
Once in Doc Express, select the appropriate contract and the appropriate drawer for the payment being submitted. The payment will show with a name similar to the one shown in the screenshot below. Do NOT update the name of the document.

The screenshot shows the 'Estimates and Vouchers' page for contract '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...'. The document 'payment-1-20231204' is highlighted with a green circle. It is a 'Progress Voucher' with an 'update' button. The document name is 'Iowa Local Systems _DEMO ACCOUNT'. There are '0 comments' and '0 supporting documents'. The document was submitted on Dec 07, 2023, at 12:21 PM EST by Nicole Stinn. A 'Submit' button is visible in the top right corner.

The appropriate person should now transition the payment. To do so, click on the blue “Transition” text on the right end of the line containing the document.

This screenshot is identical to the one above, but the 'Transition' link on the right side of the document entry is circled in green, indicating the next step in the process.

A pop-up box will appear with a pull-down menu to choose the “Status” and a Comment field. Select the appropriate status from the pull-down menu. The use of the Comment field is optional.



Estimates and Vouchers

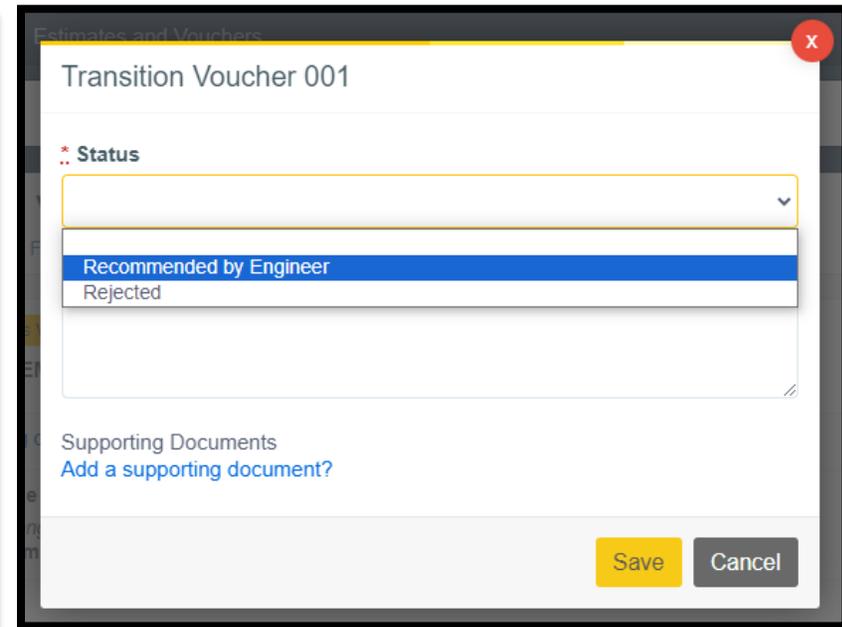
Transition Voucher 001

* Status

Comment

Supporting Documents
[Add a supporting document?](#)

Save Cancel



Estimates and Vouchers

Transition Voucher 001

* Status

Recommended by Engineer
Rejected

Comment

Supporting Documents
[Add a supporting document?](#)

Save Cancel

If a Status is selected that requires a signature, a box will automatically appear that says, "Sign this document".

The screenshot shows a software window titled "Transition Voucher 001" with a red close button in the top right corner. The window contains the following elements:

- Status:** A dropdown menu currently showing "Recommended by Engineer".
- Comment:** A large empty text area for entering a comment.
- Supporting Documents:** A section with the text "Supporting Documents" and a blue link "Add a supporting document?".
- Sign this document:** A large, light-colored box with a faint grid pattern and the text "Sign this document" in the center.
- Signature Confirmation:** A checkbox followed by the text "By checking this box and entering my name above, I am electronically signing the attached document."
- Final Status:** A checkbox followed by the text "Transition document to final status of **Completed**?"
- Buttons:** A yellow "Save" button and a grey "Cancel" button.

Sign the document by typing your name into the “Sign this document” box and check the box by the signature acknowledgment box. Signatures should ONLY be applied by the person with the authority to approve payments (the project engineer and/or the PIRC).

IF no additional signatures are needed in the workflow, check the box for “Transition document to final status of Completed?”. If additional signatures are needed, leave this box un-checked. Then click the yellow “Save” button in the lower, right corner of the box.

The screenshot shows a web form titled "Transition Voucher 001". It includes a "Status" dropdown menu set to "Recommended by Engineer", a "Comment" text area, and a "Supporting Documents" section with a link to "Add a supporting document?". A signature field contains the name "Nicole Stinn". Below the signature is a checked checkbox with the text "By checking this box and entering my name above, I am electronically signing the attached document." At the bottom, there is an unchecked checkbox labeled "Transition document to final status of Completed?". To the right of this checkbox are two buttons: a yellow "Save" button and a grey "Cancel" button. A red close button (X) is in the top right corner.

Check this box if no further signatures are required on the document. Otherwise, leave it un-checked.

The new status should now show on the right end of the line containing the document. If this status is “Completed”, you are ready to return to the Payment in Appia. If not, transition the document until it reaches the “Completed” status.

Payments will NOT transmit to the Finance Bureau unless the Doc Express status is “Completed”!

Will not be sent to Finance!

The screenshot shows the 'Estimates and Vouchers' interface for document 08-C008-089. The voucher is 'Voucher 001' with a 'Progress Voucher' tag and an 'update' button. The status is 'Recommended by Engineer', which is circled in red. A red callout box points to this status with the text 'Will not be sent to Finance!'. Other elements include 'Submit Document', 'Actions', 'Transition / Actions', and a timestamp 'Dec 01:04 PM EST'.

The screenshot shows the 'Estimates and Vouchers' interface for document 08-C008-089. The voucher is 'Voucher 001' with a 'Progress Voucher' tag. The status is 'Completed', which is circled in green. Other elements include 'Submit Document', 'Actions', 'Actions', and a timestamp 'Dec 01:07 PM EST'.

Once the document has been transitioned to a Completed status, navigate back to the Payment in Appia. The Doc Express Status shown should now say "Completed". If the status did not update, refresh the browser page.

The screenshot displays a software interface for document management. At the top, the document ID is 08-C008-089, with a red 'Under Construction' tag. Below this, the document details are: FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023. Navigation buttons for 'Approve', 'Actions', and 'Reports' are visible. A sidebar on the left contains various menu items: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, FORCE ACCOUNTS, and PURCH LIST. The main content area is divided into sections: 'Payment Information' and 'Doc Express® Information'. The 'Payment Information' section includes 'Payment Details' (Payment Number 1, Percent Complete 3.3%, Payment Status Pending, Item Payment Amount \$17,303.50), 'Project Details' (Prime Contractor DIXON CONSTRUCTION CO.), 'Pay Period' (From Date 09/25/2023, To Date 10/04/2023), and 'Retainage' (Retainage Percent 3.000%, Retainage Released \$0.00, Retainage Cap Amount \$30,000.00). The 'Doc Express® Information' section, dated 12/07/2023 01:11 PM EST, shows 'Document Name' as Voucher 001 - View in Doc Express, 'Date Submitted to Doc Express' as 12/07/2023, and 'Doc Express Status' as Completed. The 'Doc Express Status' text is circled in green.

Payment Details	
Payment Number	1
Percent Complete	3.3%
Payment Status	Pending
Item Payment Amount	\$17,303.50

Project Details	
Prime Contractor	DIXON CONSTRUCTION CO.

Pay Period	
From Date	09/25/2023
To Date	10/04/2023

Retainage	
Retainage Percent	3.000%
Retainage Released	\$0.00
Retainage Cap Amount	\$30,000.00

Doc Express® Information <small>as of 12/07/2023 01:11 PM EST</small>		
Document Name	Date Submitted to Doc Express	Doc Express Status
Voucher 001 - View in Doc Express	12/07/2023	Completed
Doc Express Type(s)		
Progress Voucher		

Once the Doc Express status of “Completed” is showing in the payment and you are SURE the payment is ready to be submitted to the Finance Bureau for processing, click on the blue “Approve” button in the upper, right corner of the Payment screen. **Do NOT approve the payment in Appia until the Payment has been transitioned to “Completed” in Doc Express.** Appia will NOT automatically pull in the updated Doc Express status, and the payment will not be processed because the updated status is not reflected.

For contracts let in January 2024 or later, clicking “Approve” WILL send the payment to Finance. Do NOT email the payment report to the DOT.LocalSystems@iowadot.us email address also. Emailing the payment will cause confusion and errors. If you do not receive any communications to the contrary, YOUR PAYMENT WENT THROUGH SUCCESSFULLY.

The screenshot displays a software interface for a project identified as 08-C008-089, which is currently in an "Under Construction" state. The interface includes a navigation sidebar on the left with options for "QUERY", "ALL REPORTS", "DAILY ACTIVITIES", and "ITEMS". The main content area is titled "Payment Information" and is divided into two sections: "Payment Details" and "Project Details". The "Payment Details" section shows a "Payment Number" of 1, a "Payment Status" of "Pending", a "Percent Complete" of 3.3%, and an "Item Payment Amount" of \$17,303.50. The "Project Details" section lists the "Prime Contractor" as "DIXON CONSTRUCTION CO.". In the top right corner of the interface, there are three buttons: "Approve", "Actions", and "Reports". The "Approve" button is highlighted with a green circle.

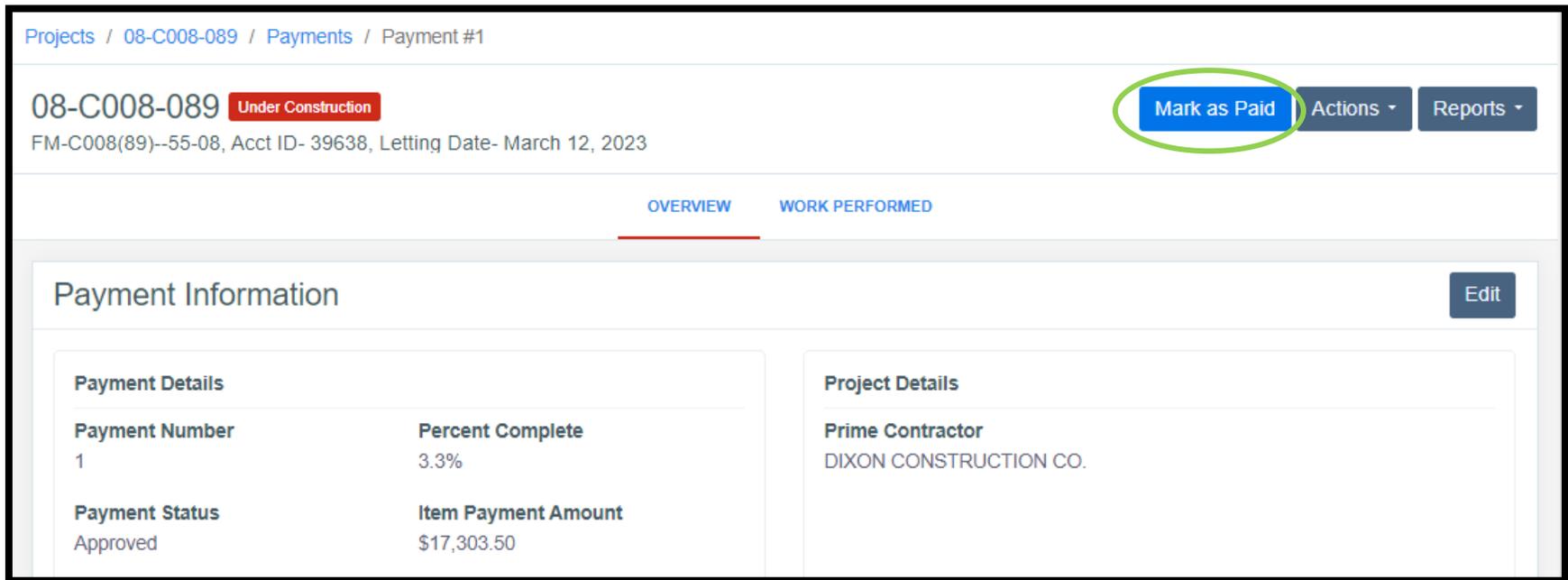
Payment Details	
Payment Number	1
Payment Status	Pending
Percent Complete	3.3%
Item Payment Amount	\$17,303.50

Project Details	
Prime Contractor	DIXON CONSTRUCTION CO.

Once the payment has been made a Proof of Payment document will be uploaded to Doc Express by the Local Systems Bureau. Once the Proof of Payment has been uploaded and the LPA has checked the Proof of Payment against their submitted Appia payment report, the payment can be Marked as “Paid” in Appia.

Marking a payment as “Paid” is “undo-able”. It will lock down all approved reports/entries in Appia made prior to the “Paid” date. This includes change orders and daily reports. Marking a payment as “Paid” is recommended in order to avoid payments from being intentionally or unintentionally un-approved and changed after they have already been submitted to the Finance Bureau for processing. However, do NOT mark a payment as “Paid” until you are sure are prior entries are in order.

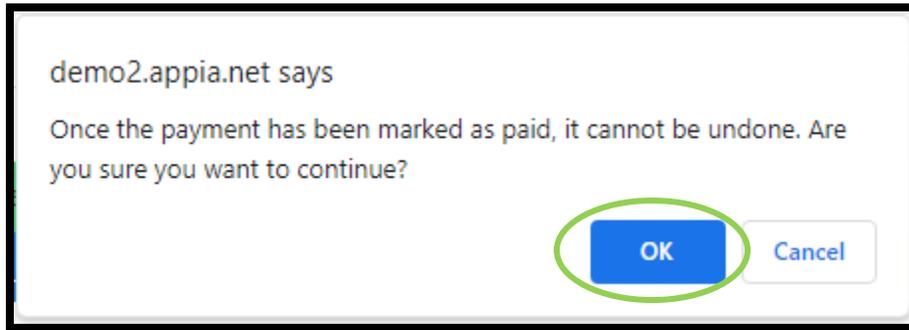
To mark a payment as “Paid”, click on the blue “Mark as Paid” button near the top, right corner of the Payment screen.



The screenshot shows the Appia interface for a payment. At the top, there is a breadcrumb trail: [Projects](#) / [08-C008-089](#) / [Payments](#) / [Payment #1](#). Below this, the project ID **08-C008-089** is displayed with a red **Under Construction** status tag. To the right, there are three buttons: **Mark as Paid** (highlighted with a green circle), **Actions** with a dropdown arrow, and **Reports** with a dropdown arrow. Below the buttons, the text **FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023** is visible. The main content area has two tabs: **OVERVIEW** (selected) and **WORK PERFORMED**. The **Payment Information** section includes an **Edit** button and two columns of data:

Payment Details		Project Details	
Payment Number	Percent Complete	Prime Contractor	
1	3.3%	DIXON CONSTRUCTION CO.	
Payment Status	Item Payment Amount		
Approved	\$17,303.50		

A pop-up box will appear near the top of the screen asking if you are sure you want to continue and that the action cannot be undone. Click the blue "OK" button if you want to proceed.



A green ribbon will appear at the top of the Payment screen saying, "The payment has been paid."

2) [Making a Final Payment](#)

When a local agency has completed the semi-final payment, and after the Administering Team has audited/reviewed the project or waived the audit/review, it is time to move forward with processing a final payment, which includes any remaining adjustments to bid items and retainage release. For projects subject to this section, Appia's final payment process must be utilized. This process includes the creation of a balancing change order, if the applicable setting did not get un-checked, and requires marking items and time limits as "complete". See the [Appia's Final Payment Process – Including Balancing Change Order](#) or the [Appia's Final Payment Process – Without Balancing Change Order](#) subsections for guidance on this process.

Payments

Add

! Issue final payment? x

End Date	Status	Payment	To Date	% Complete	No.
10/04/2023	Approved Doc Express	\$16,784.39	\$16,784.39	<div style="width: 3.3%;">3.3%</div>	1

Displaying 1 payment

I. [Early or Partial Retainage Release](#)

In the event a contractor requests an early/partial release of retained funds, a payment may be created for this purpose. Before completing any early/partial retainage release payments, refer to [I.M. 6.000, Attachment D](#) (section 2.28) and confirm with your [Local Systems Field Engineer](#) or Systems Planning Project Manager that a release is acceptable. Under no circumstances should a Local Public Agency release the full retainage until the project audit/review has been completed or waived by the Administering Team and the Administering Team has given the “ok” to release the retainage.

To create a payment with a partial retainage release, you will generate a standard payment in the same manner you’ve generated progress payments throughout the rest of the project. (See each of the previous subsections in this [Payments](#) section for instructions on creating payments.) Early retainage release payments should only include the retainage release and should not include any item progress payments. Appia will automatically include any item postings in the date range specified for the payment, so be sure to either run the payment for the retainage release in a week with no other item progress postings or keep the Daily Reports with the postings in draft status so they are not incorporated into the retainage release payment.

- To release retainage, simply enter the amount of retainage that needs to be released in the “Release” field. (The Retainage % should not need to be adjusted and can be left at the % used throughout the project.)
 - The value of retainage previously held on that contract can be found in the summary block on the last issued payment or on the “Overview” screen for the project. (Click “Save” to see the summary block on the “Overview” screen if in editing mode.)
- Remarks: In the “Remarks” field, enter “Early/Partial Retainage Release”.
- From/To Dates: Double check that you are paying to the last date desired.
- Exclusions: Double check that any exclusions are appropriate before approving your payment.

Click the blue “Save” button in the top, right corner and submit the payment for approval as typical when all details have been entered. A “Detailed Payment” report can then be generated which will summarize the payment.

See screenshot on the next page.

ALL REPORTS
Edit Save Cancel

Payment Details

Payment Number	4	Percent Complete	0.8%
Payment Status	Draft	Item Payment Amount	\$0.00

Project Details

Prime Contractor
NORRIS ASPHALT PAVING CO., LC

Pay Period

* From Date	09/07/2023	* To Date	10/06/2023
--------------------	------------	------------------	------------

Payment Dates

Approval Date	<input type="text"/>	Payment Date	<input type="text"/>
----------------------	----------------------	---------------------	----------------------

Retainage

Retain	3.000%	Retainage Cap Amount	\$30,000.00
Release	\$31,981.20	Edit Project Cap Settings	

Remarks

14px B I U

Early/Partial Retainage Release

J. [Final Payment](#)

When a local agency has completed the semi-final payment, and after the Administering Team has audited/reviewed the project or waived the audit/review, it is time to move forward with processing a final payment.

STOP: Do NOT make final payment and release retainage on a DOT-administered project unless the Administering Team has completed or waived their audit/review and has given the “ok” to make final payment.

Two processes exist for generating a final payment.

1. Standard Payment Process: See the [Standard Payment for Final Payment](#) subsection for guidance.
2. Appia’s Final Payment Process: See the [Appia’s Final Payment Process – Including Balancing Change Order](#) or the [Appia’s Final Payment Process – Without Balancing Change Order](#) subsection, whichever is applicable.

Please refer to the guidance below for the appropriate final payment option.

Reimbursement Projects

City Projects & County Projects NOT on the Farm-to-Market System

May use either the Standard Payment Process or Appia’s Final Payment Process (recommended)

Contractor Payment System (CPS) Projects

County Projects ON the Farm-to-Market System LET PRIOR TO JANUARY 2024

May use either the Standard Payment Process or Appia’s Final Payment Process (recommended)

Appia Auto-Pay Projects

County Projects ON the Farm-to-Market System LET ON OR AFTER JANUARY 2024

Use Appia’s Final Payment Process only.

Projects / BROS-C086(60)--8J-86 - 31961 / Payments

BROS-C086(60)--8J-86 - 31961 Under Construction
 Gladbrook Bridge Replacement Letting Date: October 21, 2014

Payments Add

Issue final payment?

End Date	Status	Payment	To Date	% Complete	No.
01/28/2019	Approved	\$65,415.25	\$72,753.30	6.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

Displaying all 2 payments

infotech

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Refer to the paragraph directly above to determine if Appia's final payment process is appropriate for the project.

Note: For county projects paid through the FM account, a Board of Supervisors signature is required on the final payment. If a signature line has not been created for the Board already, please create it prior to creating the final payment. See either the Default Settings or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for setting up signature lines on payment reports.

1) [Standard Payment for Final Payment](#)

To create a final payment report using the standard payment method, you will generate a standard payment report in the same manner you've generated progress payment reports throughout the rest of the project. (See each of the previous subsections in the [Payments](#) section for instructions on creating payment reports.)

The only difference between the final payment and progress payments will be the remark entered and the value entered in the "Release" field.

- Retainage Release: For the retainage release, simply enter the amount of retainage that needs to be released in the "Release" field. Do not adjust the Retainage %. Leave it at the % used throughout the project.
 - The value of retainage previously held on that contract can be found in the summary block on the last issued payment report or on the "Overview" screen for the project. (Click "Save" to see the summary block on the "Overview" screen if in editing mode.)
- Remarks: In the "Remarks" field, enter "FINAL PAYMENT".
- From/To Dates: Double check that you are paying to the last date desired.
- Exclusions: Make sure there are no exclusions (or no desired exclusions) before approving your final payment since this is the last payment on which any items will be paid.

STOP: Do NOT make final payment and release retainage on a DOT-administered project unless the Administering Team has completed or waived their audit/review and has given the "ok" to make final payment.

If the Administering Team has completed or waived the project audit/review and has given the "ok" to make final payment, click the blue "Save" button in the top, right corner and submit the payment for approval as typical when all details have been entered. A "Detailed Payment" report can then be generated which can be downloaded and then uploaded to Doc Express for inclusion with the final packet. Please see the [Doc Express Naming Convention](#) to determine the appropriate drawer and document name.

See screenshot on the next page.

ALL REPORTS
Edit
Save Cancel

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

\$
PAYMENTS

Payment Details		Project Details	
Payment Number 3	Percent Complete 5.1%	Prime Contractor PETERSON CONTRACTORS INC.	Project Manager Nicole Stinn
Payment Status Draft	Item Payment Amount \$0.00	Managing Office Tama County Highway Department	

Pay Period		Payment Dates	
* From Date 01/29/2019	* To Date 01/31/2019	Approval Date	Payment Date

Retainage		Retainage Cap Amount \$30,000.00
Retain 3.000%	Release \$28,572.68	Edit Project Cap Settings

Remarks

14px **B** *I* U **≡** **≡** **≡** **≡** **≡** **A**

FINAL VOUCHER

AFTER the Administering Team has verified that the project is complete, the project audit is complete or waived, and the final payment generated above has been processed, then you may begin Appia’s final payment process in order to move a project to “Completed” status and remove it from the “Under Construction” status project list. See the [Appia’s Final Payment Process – Including Balancing Change Order](#) or the [Appia’s Final Payment Process – Without Balancing Change Order](#) subsection, whichever is applicable, for guidance on completing that process.

2) Appia's Final Payment Process – Including Balancing Change Order

AFTER the Administering Team has verified that the project is complete and all necessary reviews and audits have been completed, you may begin Appia's final payment process. To begin the process, click on the "Issue final payment" link on the Payments screen.

Projects / 05-C005-074 / Payments

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Payments Add

[Issue final payment?](#)

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	96.3%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	95.3%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.5%	1

Displaying all 3 payments

***Note: Appia's final payment cannot be completed on the same day as a regular payment. Therefore, you must wait at least one day after approving a normal payment to issue Appia's final payment, or you can adjust your normal payment so that the "To Date" does not include the current day.

This screen should appear. If the box was checked for the “Final Balancing Change Order Rule” in the Project Settings, a balancing change order will be required. If this is the case, first, click on the link to “Balance items”. If the box was un-checked, the item for “All items are balanced” will be absent, and no balancing change order will be required to generate the final payment. If this is the case, see the [Appia’s Final Payment Process – Without Balancing Change Order section](#). (See the Default Settings: Projects Settings and/or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for further guidance on the final balancing change order setting.)

Clicking on “Balance items?” will cause a “Balancing Change Order” to be automatically created for all items except items marked as “lump sum” items. (This is partially why Local Systems asks you to remove lump sum “flags” from lump sum items in your reference data. See the [Appia Project Creation & Account Management Instructions](#) for removing lump sum “flags” from items.) A balancing change order changes the authorized quantities (original contract quantities or original quantities + change orders to date) to match the quantities that have been paid or are in an approved daily report.

Page County Test Under Construction
Letting Date


Final Payment
Final payment cannot be made until...

-  All items are balanced.
Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
-  All items are completed.
Items must be completed to ensure correct payment adjustments. [Complete items?](#)
-  All punch list tasks are completed.
Done.
-  All stockpiles are fully recovered.
Done.
-  All time limits are completed.
Time limits must be completed. [Complete time limits?](#)

[Create Final Payment](#)

Clicking on "Balance items" will bring up this screen. Check the "Items" box in the upper, left corner to select all items. Then, click the gray "Balance Items" button at the bottom or in the top, right corner.

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Items Save **Balance Items** Cancel

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

Line Number	Item ID	Unit	Description	Complete?	
<input checked="" type="checkbox"/> Section: 0001 - ROADWAY ITEMS					
<input checked="" type="checkbox"/>	0010	2102-2713070	CY	EXCAVATION, CLASS 13, ROADWAY AND BORROW	No
<input checked="" type="checkbox"/>	0020	2109-8225100	STA	SPECIAL COMPACTION OF SUBGRADE	No
<input checked="" type="checkbox"/>	0030	2113-0001100	SY	SUBGRADE STABILIZATION MATERIAL, POLYMER GRID	No
<input checked="" type="checkbox"/>	0040	2115-0100000	CY	MODIFIED SUBBASE	No
<input checked="" type="checkbox"/>	0050	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/>	0060	2122-5500080	SY	PAVED SHOULDER, HOT MIX ASPHALT MIXTURE, 8 IN.	No
<input checked="" type="checkbox"/>	0070	2210-0475105	TON	CHOKE STONE BASE	No
<input checked="" type="checkbox"/>	0080	2217-1000000	SY	RUBBLIZED PAVEMENT	No
<input checked="" type="checkbox"/>	0090	2301-1032080	SY	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 8 IN.	No

TIME LIMITS

<input checked="" type="checkbox"/>	0260	2527-9263180	STA	PAVEMENT MARKINGS REMOVED	No
<input checked="" type="checkbox"/>	0270	2528-2518000	EACH	SAFETY CLOSURE	No
<input checked="" type="checkbox"/>	0280	2528-8400256	EACH	TEMPORARY TRAFFIC SIGNALS	No
<input checked="" type="checkbox"/>	0290	2528-8445110	LS	TRAFFIC CONTROL	No
<input checked="" type="checkbox"/>	0300	2533-4980005	LS	MOBILIZATION	No

Save **Balance Items**

A screen like this should appear with a green ribbon across the top saying, “The items have been updated successfully”. This is the newly created “balancing change order”. Review the items, and then click the blue “Submit for Approval” button in the upper, right corner. A drop-down menu will appear. Select “Submit to Doc Express”.

Projects / 05-C005-074 / Change Orders / Change Order #1

05-C005-074 Under Construction
 FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Change Order Edit

Date Created 01/15/2024 **Status** Draft
Summary Balancing Change Order for Final Payment **Type**
Description Balancing Change Order for Final Payment **Total Proposed Amount** -\$65,556.57

Quantity Changes Edit

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
Section: 0001 - ROADWAY ITEMS							
0010	2102-2713070	CY	407.900	-2.080	405.820	\$18.000	-\$37.44
EXCAVATION, CLASS 13, ROADWAY AND BORROW Reason: Balancing Change Order							
		DIVISION 1 FM-C005(74)--55-05	407.900	-2.080	405.820	\$18.000	-\$37.44
0020	2109-8225100	STA	7.600	-0.600	7.000	\$600.000	-\$360.00
SPECIAL COMPACTION OF SUBGRADE Reason: Balancing Change Order							

Follow the instructions in the [Submitting Change Orders for Approval Using the Doc Express Integration](#) section for submitting a change order through Doc Express.

Note: At this point, if you were to your Change Orders tab you would see that a change order has been created. Click to edit the change order to get back into it.

The screenshot displays a software interface for managing change orders. On the left is a dark sidebar with navigation icons and labels: ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, and CHANGE ORDERS (highlighted with a red circle). The main area is titled 'Change Orders' and features a table with columns: Date, Status, Amount, Type, Summary, and No. A single entry is shown with the date 01/15/2024, status Draft (circled in green), amount -\$65,556.57, and summary 'Balancing Change Order for Final Payment' (circled in green). The number '1' is in the 'No.' column. Below the table, it says 'Displaying 1 change order'. An 'Add' button is in the top right corner. At the bottom center, there is a blue circle containing the number 243.

Date	Status	Amount	Type	Summary	No.
01/15/2024	Draft	-\$65,556.57		Balancing Change Order for Final Payment	1

After clicking “Submit for Approval”, an “Approve” button will show if you have an appropriate role type which can administer approvals. If the appropriate Doc Express transitions have been completed and the change order has a Doc Express status of “Completed”, click “Approve”.

05-C005-074 Under Construction
 FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Approve Actions Reports

Change Order

Date Created
01/15/2024

Status
Pending

Summary
Balancing Change Order for Final Payment

Type
Total Pending Amount
-\$65,556.57

Description
Balancing Change Order for Final Payment

Doc Express® Information as of 01/15/2024 04:08 PM EST

Document Name
change_order-1-20240115 - [View in Doc Express](#)

Date Submitted to Doc Express
01/15/2024

Doc Express Status
Completed

Doc Express Type(s)
Change Order

Quantity Changes

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
Section: 0001 - ROADWAY ITEMS							
0010	2102-2713070	CY	407.900	-2.080	405.820	\$18.000	-\$37.44

****Note:** Any lump sum items are present in the contract which are still flagged as lump sum items will have to be “balanced” on a normal change order if the quantity placed does not equal the contract quantity. This must be done in order to issue a final payment.

Now, go back to the Payments tab, and again click on the link for “Issue final payment”.

The screenshot displays the 'Payments' section of a software interface. At the top, the project name 'BROS-C086(60)--8J-86 - 31961' is shown with a red 'Under Construction' tag. Below this, the text 'Gladbrook Bridge Replacement Letting Date: October 21, 2014' is visible. The main heading is 'Payments', with an 'Add' button on the right. A link 'Issue final payment?' is highlighted with a green circle. Below the heading is a table with the following data:

End Date	Status	Payment	To Date	% Complete	No.
01/28/2019	Approved	\$65,415.25	\$72,753.30	5.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

At the bottom of the table, it says 'Displaying all 2 payments'. The Infotech logo is at the bottom left, and the copyright notice 'Copyright © 2021, Infotech®. All rights reserved.' is at the bottom right.

If the Final Payment screen shows a green check mark by the “All items are balanced” line, continue with marking items as complete. If not, please reference the [Troubleshooting Common Final Payment Issues](#) section.

Completing the balancing change order in the manner described above should have taken care of the second step in Appia’s final payment process, which is marking all items as “complete”.

Note: The “All items are balanced” will not show a green check mark until the balancing change order has been approved. It cannot remain in pending or draft status.

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Final Payment
Final payment cannot be made until...

- ✓ All items are balanced. Done.
- ✓ All items are completed. Done.
- ✓ All punch list tasks are completed. Done.
- ✓ All stockpiles are fully recovered. Done.
- ! All time limits are completed. Time limits must be completed. [Complete time limits?](#)

Create Final Payment

If the second item for all items being marked complete does not have a green check mark, click on the “Complete items” link and this screen will come up. Check the “Items” box in the upper, left corner to select all items. Then, click the blue “Save” button at the bottom or in the top, right corner.

25-C025-118 Under Construction
FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

Items

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

Line Number	Item ID	Unit	Description	Complete?
<input checked="" type="checkbox"/> Section: 0001 - Roadway Items				
<input checked="" type="checkbox"/> 0010	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/> 0020	2210-0475105	TON	CHOKE STONE BASE	No
<input checked="" type="checkbox"/> 0030	2210-0475290	TON	MACADAM STONE BASE	No
<input checked="" type="checkbox"/> 0040	2213-2713300	CY	EXCAVATION, CLASS 13, FOR WIDENING	No
<input checked="" type="checkbox"/> 0050	2303-1031500	TON	HOT MIX ASPHALT STANDARD TRAFFIC, BASE COURSE, 1/2 IN. MIX	No
<input checked="" type="checkbox"/> 0060	2303-1258283	TON	ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC	No
<input checked="" type="checkbox"/> 0070	2303-6911000	LS	HOT MIX ASPHALT PAVEMENT SAMPLES	No
<input checked="" type="checkbox"/> 0080	2502-8212034	LF	SUBDRAIN, LONGITUDINAL, (SHOULDER) 4 IN. DIA.	No
<input checked="" type="checkbox"/> 0090	2502-8225010	EACH	SUBDRAIN OUTLET, 500-10	No
<input checked="" type="checkbox"/> 0100	2528-8445110	LS	TRAFFIC CONTROL	No
<input checked="" type="checkbox"/> 0110	2528-8445113	EACH	FLAGGERS	No
<input checked="" type="checkbox"/> 0120	2533-4980005	LS	MOBILIZATION	No

Continue completing any remaining steps in Appia's final payment process for punch lists and stockpiles. (Reminder: To get here, go to Payments and then click on the "Issue final payment" link.) Last, follow the "Complete time limits?" link to mark Time Limits as complete.

25-C025-118 Under Construction
FM-C025(118)-55-25: Acct ID 37059, Letting Date: August 18, 2020

OVERVIEW
LABS
QUERY
ALL REPORTS
DAILY ACTIVITIES
ITEMS
MATERIALS

Final Payment
Final payment cannot be made until...

- All items are balanced.
Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
- All items are completed.
Done.
- All punch list tasks are completed.
Done.
- All stockpiles are fully recovered.
Done.
- All time limits are completed.
Time limits must be completed. [Complete time limits?](#)

Create Final Payment

Clicking on the “Complete time limits?” link will bring you to the Time Limits section. Click on the blue text of the name of the appropriate time limit and then on the “Edit” button in the next screen to edit the time limits data.

Time limit name	Type	Completed	Status	Days remaining
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	0.0%	Not Started	35.0

Displaying 1 time limit

Description	Type	Status
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	Not Started

Original Days Allowed	Liquidated Damages/Day	Authorized Days Allowed
35.0	\$0.00	35.0

In the editing screen, click on the “Work Completed” toggle to mark it as “Yes”. Then click the blue “Save” button in the top, right corner.

Edit

Working Days

Description
Working Days, Late Start Date: 09/21/20, Liquidated Damages: \$1,000.00

Start Date
09/11/2020

Work Completed
09/14/2020

Days Charged
1.5

Liquidated Damages/Day
\$0.00

Days Remaining
23.5

Total Liquidated Damages
\$0.00

Primary Deadline?
 YES

Work Completed?
 YES

Save **Cancel**

April 2021

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Return to the final payment.

Payments **Add**

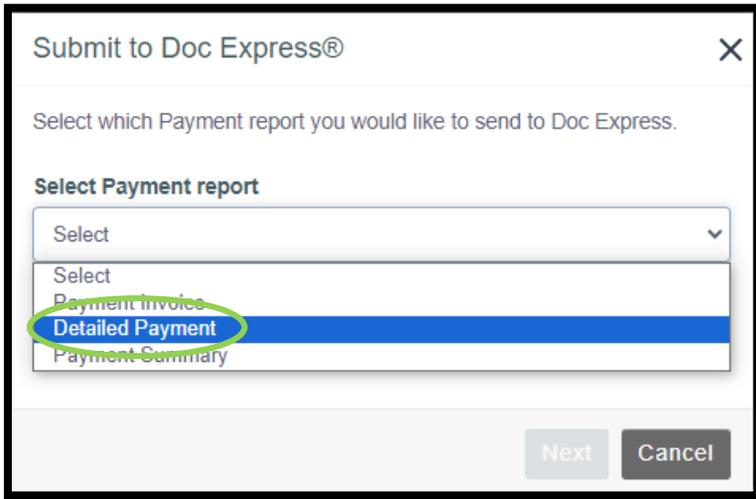
Issue final payment?

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

When all tasks in the “Issue final payments screen have been completed”, it will bring you to the payment screen, and a ribbon across the top will say, “The payment has been saved successfully.” Review the details in the payment and then click on the blue “Submit for Approval” button in the top, right corner, and choose the “Submit to Doc Express” option from the drop-down menu.

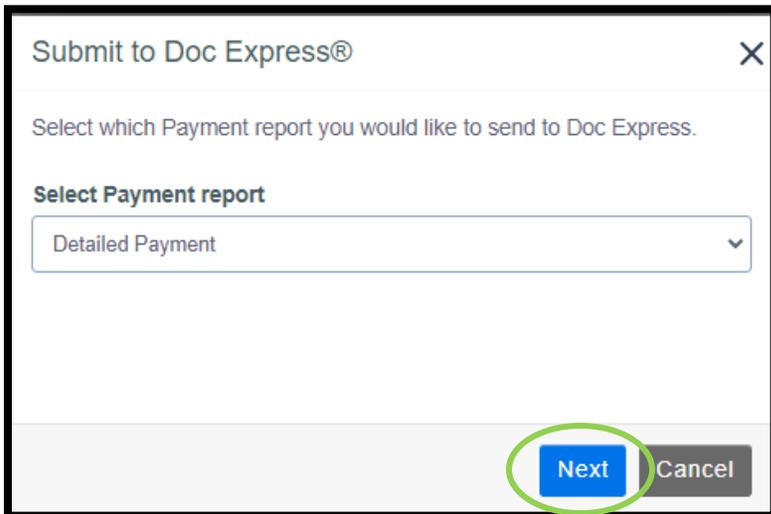
The screenshot displays a software interface for editing a final payment. The top status bar is green and contains the message: "The payment has been saved successfully." Below this, a blue bar indicates the user is logged in as "Iowa Local Systems _DEMO ACCOUNT" and provides a link to "Switch to another business?". The breadcrumb trail shows the path: "Projects / 05-C005-074 / Payments / Payment #4 / Edit". The main header displays the project ID "05-C005-074" with a red "Under Construction" tag, and the account information "FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022". A navigation ribbon includes "OVERVIEW", "SUMMARY", "WORK PERFORMED", and "ATTACHMENTS". A blue bar below the ribbon states "This is your final payment." The main content area is titled "Edit Final Payment" and includes "Save" and "Cancel" buttons. The "Payment Details" section shows: Payment Number 4, Percent Complete 100.0%, Payment Status Draft, and Item Payment Amount \$0.00. The "Project Details" section shows the Prime Contractor as "HENNINGSEN CONSTRUCTION, INC.". The "Pay Period" section shows a From Date of 01/03/2024 and a To Date of 01/15/2024. The "Payment Dates" section includes fields for Approval Date and Payment Date. The "Submit For Approval" button and its dropdown menu, which includes "Submit in Appia®" and "Submit to Doc Express®", are highlighted with green circles.

A pop-up box will appear in which a payment report needs to be selected from the drop-down menu. Unless instructed otherwise by the Administering Team, always select the “Detailed Payment” report.



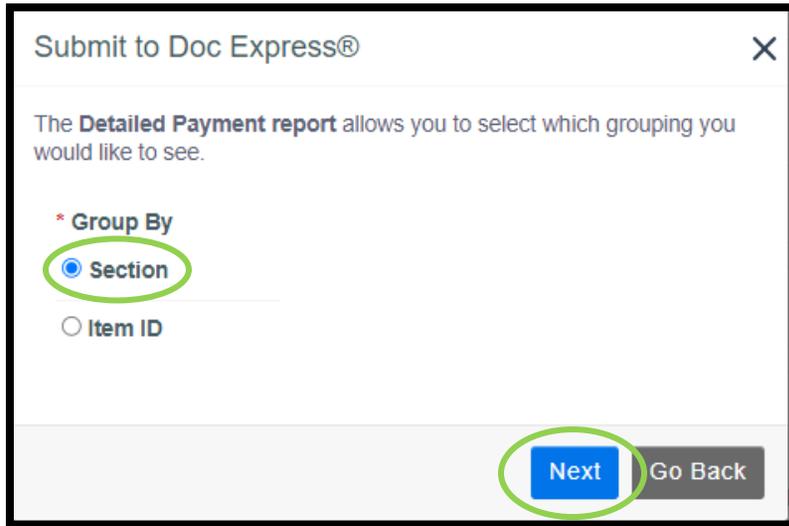
The screenshot shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title, there is a prompt: "Select which Payment report you would like to send to Doc Express." Underneath, the section "Select Payment report" contains a dropdown menu. The menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is circled in green. At the bottom right of the dialog box, there are two buttons: "Next" (disabled) and "Cancel" (active).

When the appropriate report is showing in the “Select Payment report” line, click on the blue “Next” button in the lower, right corner of the box.



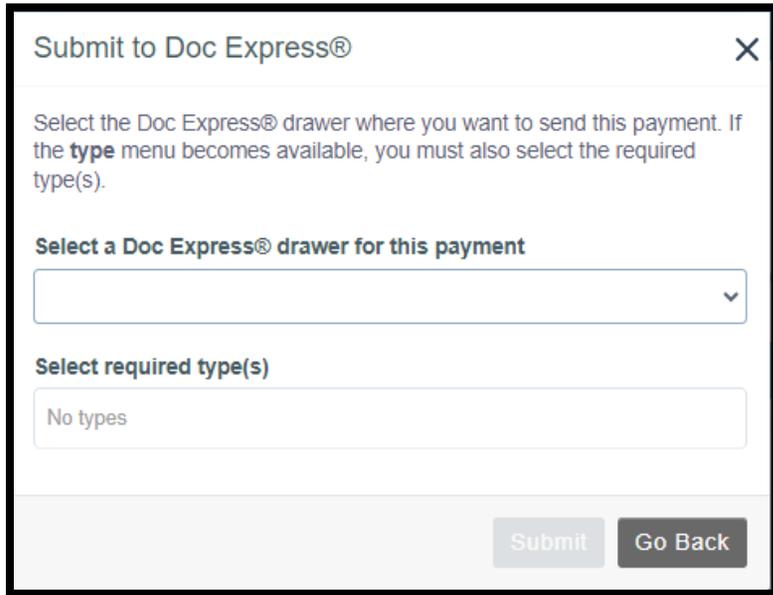
The screenshot shows the same "Submit to Doc Express®" dialog box. The dropdown menu now displays "Detailed Payment" as the selected option. The "Next" button at the bottom right is now highlighted with a blue background and circled in green, indicating it should be clicked. The "Cancel" button remains disabled.

Another pop-up box will appear asking how the report should be grouped. Leave the Group By “Section” option selected. (This option keeps all of the bid items in order and groups them by project/division when a contract has more than one project/division.) Then, click the blue “Next” button in the lower, right corner of the box.



The image shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. The main text reads: "The **Detailed Payment report** allows you to select which grouping you would like to see." Below this, there is a section labeled "* Group By" with two radio button options: "Section" (which is selected and circled in green) and "Item ID". At the bottom right of the dialog, there are two buttons: a blue "Next" button (circled in green) and a grey "Go Back" button.

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. (Note: The naming convention will show, for the Final Payment, the drawer should be the **Project Closeout** drawer, and the type should be **Final Payment**.)



The screenshot shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. The window contains the following text and controls:

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

[Empty dropdown menu]

Select required type(s)

[Text box containing "No types"]

[Submit] [Go Back]

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Select
Change Order
Contract Documents
Estimates and Vouchers
Project Closeout

Submit Go Back

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

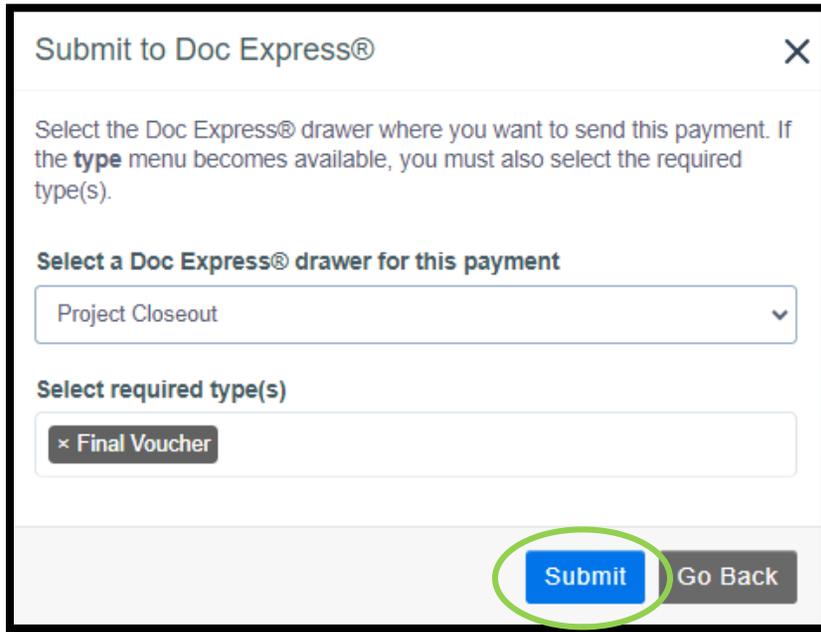
Project Closeout

Select required type(s)

Select type(s)

Final Estimate
Final Forms Checklist (6.110 Attachment F)
Final Payment (Form 830436)
Final Voucher
Interest Payment Information (Form 830236)

Once the correct drawer and type have each been selected from the pull-down menus, click on the blue “Submit” button in the lower, right corner of the box.



Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

× Final Voucher

Submit Go Back

You will be returned to the Payment screen where a green ribbon will appear at the top saying, “The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully.”

For the remainder of the approval process in both Doc Express and Appia, follow the instructions in subsection [Submitting Payment for Approval](#) within section [Approving & Submitting and Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#). Note, you will pick up mid-way through the [Submitting Payments for Approval](#) subsection after the instructions for submitting to Doc Express (similar to those shown in this section).

The Payments screen will now show Appia's Final Payment with a red "Final Payment" icon.

End Date	Status	Payment	To Date	% Complete	No.
01/15/2024	Approved Doc Express Final Payment	\$30,000.00	\$1,710,823.63	100.0%	4
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

Displaying all 4 payments

The last step is marking the payment as "Paid". This action will move your project to the "Completed" status, so it will no longer be listed with the projects in the "Under Construction" status. Make sure everything is complete before performing this action. **THIS ACTION CANNOT BE UNDONE. Make sure you have received Proof of Payment and the Administering Team has fully closed out the project before marking the final payment as "Paid".**

When ready, click on the blue circle icon with the pencil (shown above) to edit the payment information.

End Date	Status	Payment	To Date	% Complete	No.
04/07/2021	Approved Final Payment	\$1,308.87	\$43,629.00	100.0%	4
04/03/2021	Approved	\$37,927.00	\$42,320.13	100.0%	3
04/02/2021	Approved	\$4,365.00	\$4,393.13	10.4%	2
02/01/2021	Approved	\$28.13	\$28.13	0.1%	1

Displaying all 4 payments

In the payment overview screen, enter the “Payment Date”, and then click the blue “Save” button to the right. Last, click the blue “Mark as Paid” button in the top, right corner.

The screenshot shows the Appia payment overview screen for project 18-C018-076, which is in "Under Construction" status. The page includes a navigation sidebar on the left with options like OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES. The main content area has tabs for OVERVIEW and WORK PERFORMED. A notification bar at the top states "This is your final payment." Below this, there is an "Edit" button and a "Final Payment" label. The "Payment Details" section shows Payment Number 4, Percent Complete 100.0%, Payment Status Approved, and Item Payment Amount \$0.00. The "Project Details" section shows Prime Contractor INROADS, LLC. The "Pay Period" section shows From Date 04/04/2021 and To Date 04/07/2021. The "Payment Dates" section shows Approval Date and Payment Date 04/07/2021. The "Mark as Paid" button in the top right and the "Save" button are circled in green.

A pop-up box will appear saying, “Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?”. Click “OK”.

The screenshot shows a confirmation pop-up box with the text: "demo2.appia.net says Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?". At the bottom of the box, there are two buttons: "OK" and "Cancel". The "OK" button is circled in green.

Your project is automatically moved to “Completed” status and will be listed there now.

Congratulations!!! You have successfully completed a project in Appia!

3) Appia's Final Payment Process – Without Balancing Change Order

AFTER the Administering Team has verified that the project is complete and all necessary reviews and audits have been completed, you may begin Appia's final payment process. To begin the process, click on the "Issue final payment" link on the Payments screen.

The screenshot shows the Appia interface for project 05-C005-074, which is in 'Under Construction' status. The breadcrumb trail is 'Projects / 05-C005-074 / Payments'. The project details include 'FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022'. The 'Payments' section has an 'Add' button and a link 'Issue final payment?' which is circled in green. Below this is a table of payments:

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	96.3%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	95.3%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.5%	1

Displaying all 3 payments

***Note: Appia's final payment cannot be completed on the same day as a regular payment. Therefore, you must wait at least one day after approving a normal payment to issue Appia's final payment, or you can adjust your normal payment so that the "To Date" does not include the current day.

This screen should appear. If the box was checked for the “Final Balancing Change Order Rule” in the Project Settings, a balancing change order will be required. If this is the case, see the [Appia’s Final Payment Process – Including Balancing Change Order](#) section. If the box was unchecked, the item for “All items are balanced” will be absent, and no balancing change order will be required to generate the final payment. If this is the case, follow the guidance in this section. (See the Default Settings: Projects Settings and/or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for further guidance on the final balancing change order setting.)

The first step will be marking all items complete. Click on the blue “Complete items” link.

The screenshot shows the 'Final Payment' screen in the Appia software. The breadcrumb trail at the top reads 'Projects / 16-C016-115 / Payments / Final Payment'. The project name '16-C016-115' is followed by a red 'Under Construction' tag. Below this, the text reads 'BROS-SWAP-C016(115)--SE-16, Acct ID- 38911, Letting Date- November 15, 2022'. The main content area is split into two columns. The left column features a large icon of a document with a dollar sign and the text 'Final Payment' and 'Final payment cannot be made until...'. The right column contains a list of completion requirements:

- ❗ All items are completed. Items must be completed to ensure correct payment adjustments. [Complete items?](#)
- ✅ All punch list tasks are completed. Done.
- ✅ All stockpiles are fully recovered. Done.
- ❗ All time limits are completed. Time limits must be completed. [Complete time limits?](#)

At the bottom of the right column, there is a note: 'Items are not balanced. This does not prevent the final payment from being created. [Balance items?](#)'. A 'Create Final Payment' button is located at the bottom right of the screen.

This screen will come up. Check the “Items” box in the upper, left corner to select all items. Then, click the blue “Save” button at the bottom or in the top, right corner.

25-C025-118 Under Construction
FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

Items

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

Line Number	Item ID	Unit	Description	Complete?
<input checked="" type="checkbox"/> Section: 0001 - Roadway Items				
<input checked="" type="checkbox"/> 0010	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/> 0020	2210-0475105	TON	CHOKE STONE BASE	No
<input checked="" type="checkbox"/> 0030	2210-0475290	TON	MACADAM STONE BASE	No
<input checked="" type="checkbox"/> 0040	2213-2713300	CY	EXCAVATION, CLASS 13, FOR WIDENING	No
<input checked="" type="checkbox"/> 0050	2303-1031500	TON	HOT MIX ASPHALT STANDARD TRAFFIC, BASE COURSE, 1/2 IN. MIX	No
<input checked="" type="checkbox"/> 0060	2303-1258283	TON	ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC	No
<input checked="" type="checkbox"/> 0070	2303-6911000	LS	HOT MIX ASPHALT PAVEMENT SAMPLES	No
<input checked="" type="checkbox"/> 0080	2502-8212034	LF	SUBDRAIN, LONGITUDINAL, (SHOULDER) 4 IN. DIA.	No
<input checked="" type="checkbox"/> 0090	2502-8225010	EACH	SUBDRAIN OUTLET, 500-10	No
<input checked="" type="checkbox"/> 0100	2528-8445110	LS	TRAFFIC CONTROL	No
<input checked="" type="checkbox"/> 0110	2528-8445113	EACH	FLAGGERS	No
<input checked="" type="checkbox"/> 0120	2533-4980005	LS	MOBILIZATION	No

Continue completing any remaining steps in Appia’s final payment process for punch lists and stockpiles. (Reminder: To get here, go to Payments and then click on the “Issue final payment” link.) Last, follow the “Complete time limits?” link to mark Time Limits as complete.

Projects / 16-C016-115 / Payments / Final Payment

16-C016-115 Under Construction
BROS-SWAP-C016(115)--SE-16, Acct ID- 38911, Letting Date- November 15, 2022

Final Payment
Final payment cannot be made until...

- ✓ All items are completed. Done.
- ✓ All punch list tasks are completed. Done.
- ✓ All stockpiles are fully recovered. Done.
- ! All time limits are completed. Time limits must be completed. [Complete time limits?](#)

Items are not balanced. This does not prevent the final payment from being created. [Balance items?](#)

Create Final Payment

Clicking on the “Complete time limits?” link will bring you to the Time Limits section. Click on the blue text of the name of the appropriate time limit and then on the “Edit” button in the next screen to edit the time limits data.

Time limit name	Type	Completed	Status	Days remaining
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	0.0%	Not Started	35.0

Displaying 1 time limit

Time Limit Primary [Edit](#) [Cancel](#)

Description Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Type Working Days	Status Not Started
Original Days Allowed 35.0	Liquidated Damages/Day \$0.00	Authorized Days Allowed 35.0

In the editing screen, click on the “Work Completed” toggle to mark it as “Yes”. Then click the blue “Save” button in the top, right corner.

Edit

Working Days

Description
Working Days, Late Start Date: 09/21/20, Liquidated Damages: \$1,000.00

Start Date
09/11/2020

Work Completed
09/14/2020

Days Charged
1.5

Liquidated Damages/Day
\$0.00

Days Remaining
23.5

Total Liquidated Damages
\$0.00

Primary Deadline?
 YES

Work Completed?
 YES

April 2021

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Return to the final payment.

Payments

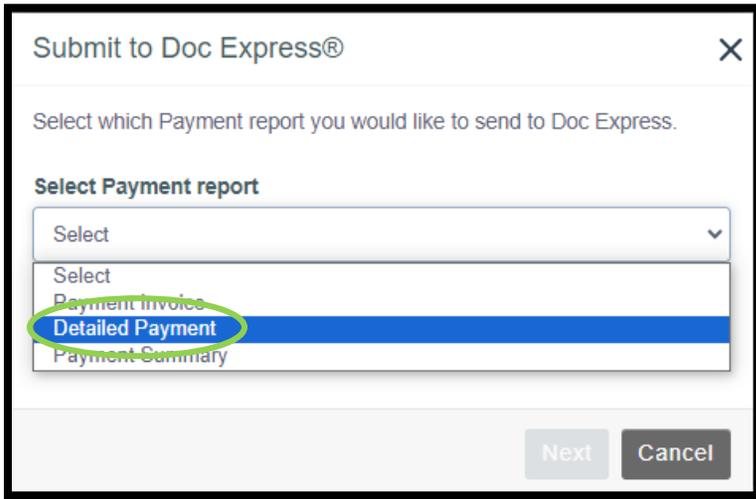
Issue final payment?

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

When all tasks in the “Issue final payments screen have been completed”, it will bring you to the payment screen, and a ribbon across the top will say, “The payment has been saved successfully.” Review the details in the payment and then click on the blue “Submit for Approval” button in the top, right corner, and choose the “Submit to Doc Express” option from the drop-down menu.

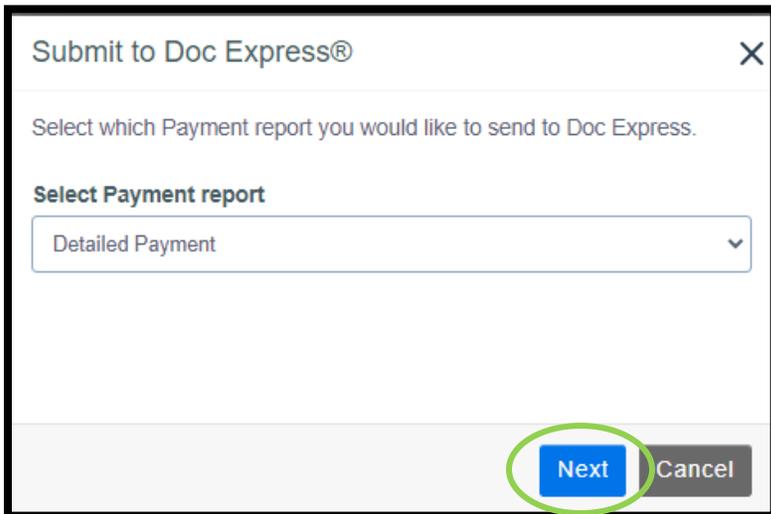
The screenshot displays a software interface for managing payments. At the top, a green notification bar states "The payment has been saved successfully." Below it, a blue banner indicates the user is logged in as "Iowa Local Systems _DEMO ACCOUNT" and offers a "Switch to another business?" option. The breadcrumb trail shows the user is in "Projects / 05-C005-074 / Payments / Payment #4 / Edit". The main header for the payment is "05-C005-074 Under Construction", with a red "Under Construction" tag. A "Submit For Approval" button is circled in green, and its dropdown menu is open, showing "Submit in Appia®" and "Submit to Doc Express®", with the latter also circled in green. Below this, a blue banner states "This is your final payment." The main form is titled "Edit Final Payment" and contains several sections: "Payment Details" (Payment Number: 4, Percent Complete: 100.0%, Payment Status: Draft, Item Payment Amount: \$0.00), "Project Details" (Prime Contractor: HENNINGSEN CONSTRUCTION, INC.), "Pay Period" (* From Date: 01/03/2024, * To Date: 01/15/2024), and "Payment Dates" (Approval Date and Payment Date fields).

A pop-up box will appear in which a payment report needs to be selected from the drop-down menu. Unless instructed otherwise by the Administering Team, always select the “Detailed Payment” report.



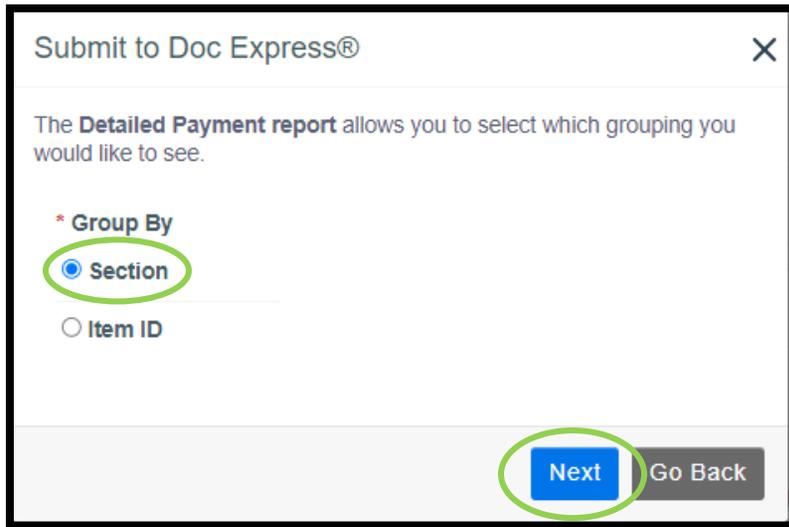
The screenshot shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title, there is a prompt: "Select which Payment report you would like to send to Doc Express." Underneath, the section "Select Payment report" contains a dropdown menu. The menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is circled in green. At the bottom right of the dialog box, there are two buttons: "Next" (disabled) and "Cancel" (active).

When the appropriate report is showing in the “Select Payment report” line, click on the blue “Next” button in the lower, right corner of the box.



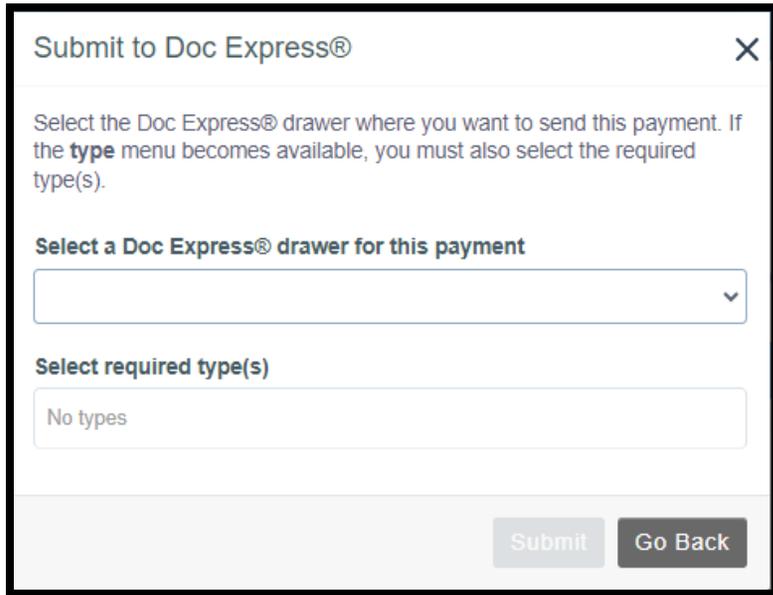
The screenshot shows the same "Submit to Doc Express®" dialog box. The dropdown menu now displays "Detailed Payment" as the selected option. The "Next" button at the bottom right is now highlighted with a blue background and is circled in green, indicating it should be clicked. The "Cancel" button remains disabled.

Another pop-up box will appear asking how the report should be grouped. Leave the Group By “Section” option selected. (This option keeps all of the bid items in order and groups them by project/division when a contract has more than one project/division.) Then, click the blue “Next” button in the lower, right corner of the box.



The image shows a dialog box titled "Submit to Doc Express®" with a close button (X) in the top right corner. The main text reads: "The **Detailed Payment report** allows you to select which grouping you would like to see." Below this, there is a section labeled "* Group By" with two radio button options: "Section" (which is selected and circled in green) and "Item ID". At the bottom right of the dialog, there are two buttons: a blue "Next" button (circled in green) and a grey "Go Back" button.

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. (Note: The naming convention will show, for the Final Payment, the drawer should be the **Project Closeout** drawer, and the type should be **Final Payment**.)



The image shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. The window contains the following text and form elements:

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

[Empty dropdown menu]

Select required type(s)

[Text box containing "No types"]

[Submit] [Go Back]

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

- Select
- Change Order
- Contract Documents
- Estimates and Vouchers
- Project Closeout**

Submit Go Back

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

- Select type(s)
- Final Estimate
- Final Forms Checklist (6.110 Attachment F)
- Final Payment (Form 830436)
- Final Voucher**
- Interest Payment Information (Form 830236)

Once the correct drawer and type have each been selected from the pull-down menus, click on the blue “Submit” button in the lower, right corner of the box.

Submit to Doc Express®

Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s).

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

× Final Voucher

Submit Go Back

You will be returned to the Payment screen where a green ribbon will appear at the top saying, “The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully.”

For the remainder of the approval process in both Doc Express and Appia, follow the instructions in subsection [Submitting Payment for Approval](#) within section [Approving & Submitting and Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#). Note, you will pick up mid-way through the [Submitting Payments for Approval](#) subsection after the instructions for submitting to Doc Express (similar to those shown in this section).

The Payments screen will now show Appia's Final Payment with a red "Final Payment" icon.

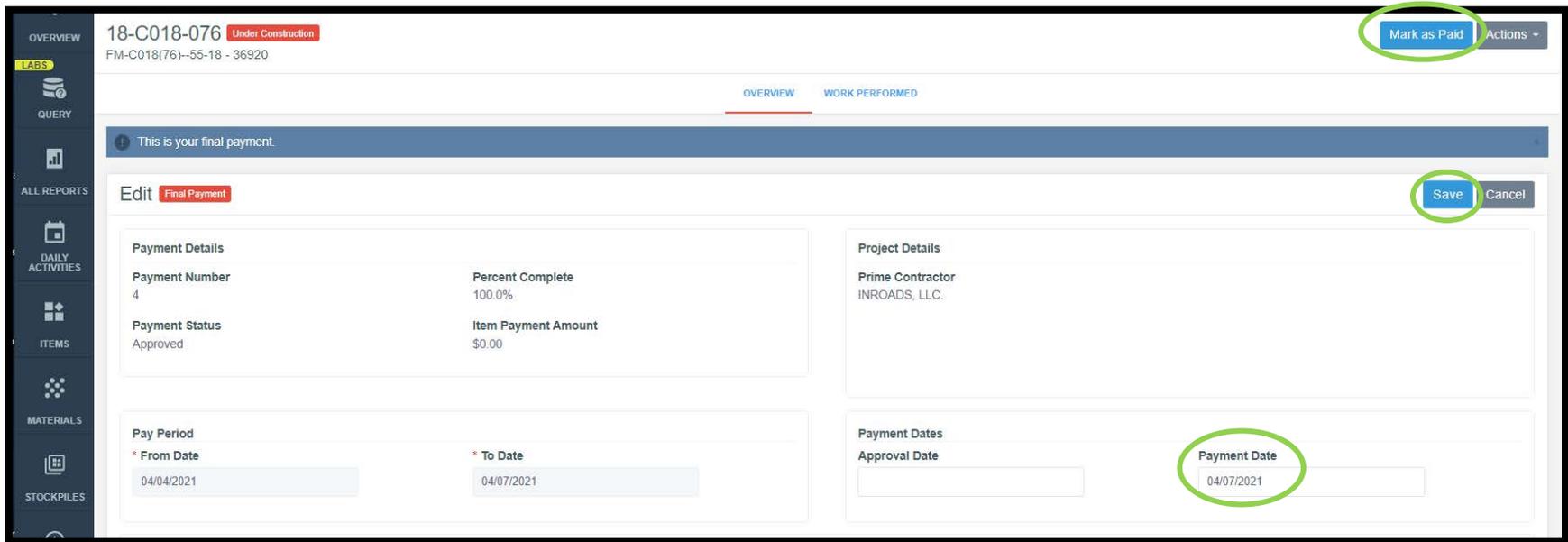
End Date	Status	Payment	To Date	% Complete	No.
01/15/2024	Approved Doc Express Final Payment	\$30,000.00	\$1,710,823.63	100.0%	4
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

The last step is marking the payment as "Paid". This action will move your project to the "Completed" status, so it will no longer be listed with the projects in the "Under Construction" status. Make sure everything is complete before performing this action. **THIS ACTION CANNOT BE UNDONE. Make sure you have received Proof of Payment and the Administering Team has fully closed out the project before marking the final payment as "Paid".**

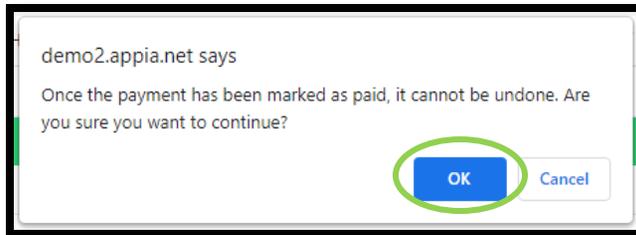
When ready, click on the blue circle icon with the pencil (shown above) to edit the payment information.

End Date	Status	Payment	To Date	% Complete	No.
04/07/2021	Approved Final Payment	\$1,308.87	\$43,629.00	100.0%	4
04/03/2021	Approved	\$37,927.00	\$42,320.13	100.0%	3
04/02/2021	Approved	\$4,365.00	\$4,393.13	10.4%	2
02/01/2021	Approved	\$28.13	\$28.13	0.1%	1

In the payment overview screen, enter the “Payment Date”, and then click the blue “Save” button to the right. Last, click the blue “Mark as Paid” button in the top, right corner.



A pop-up box will appear saying, “Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?”. Click “OK”.



Your project is automatically moved to “Completed” status and will be listed there now.

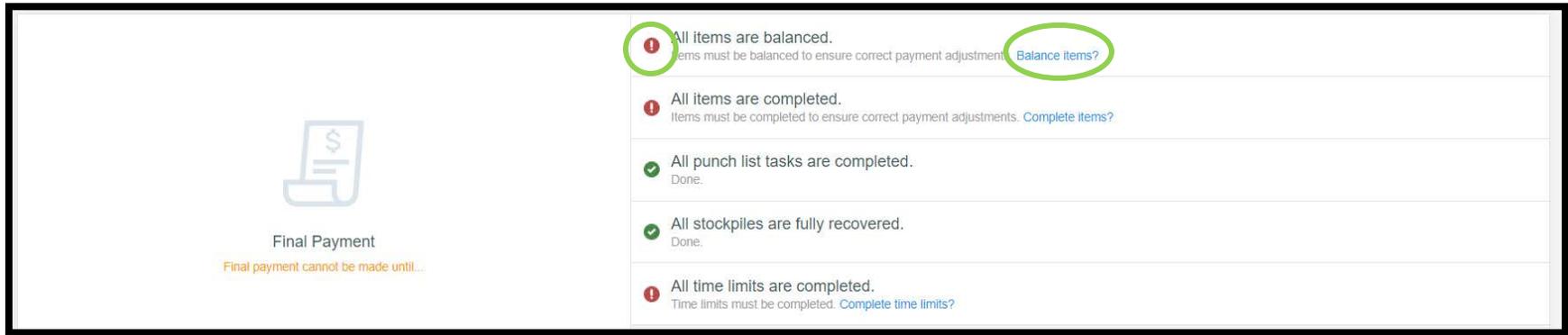
Congratulations!!! You have successfully completed a project in Appia!

4) [Troubleshooting Common Final Payment Issues](#)

Can't get items to show as "Balanced"

If the setting was left checked for "Require Final Balancing Change Order on Final Payment" and the Final Payment screen is still showing that you need to balance items, it is likely because you had some items identified as true Lump Sum items that did not get fully paid. For these items, you will need to create a change order to bring the unit price of each of the Lump Sum items to \$0.00 (if the item was not used) or to the appropriate final price for the item. To create a change order, see the [Change Orders](#) section.

After creating a change order to zero out/adjust the unit price of the Lump Sum items, create an Item Posting in a Daily Report for 1.000 units of each item. Do this even if less than 1.000 units of the item were completed. The unit price set in the change order is the new total item price.



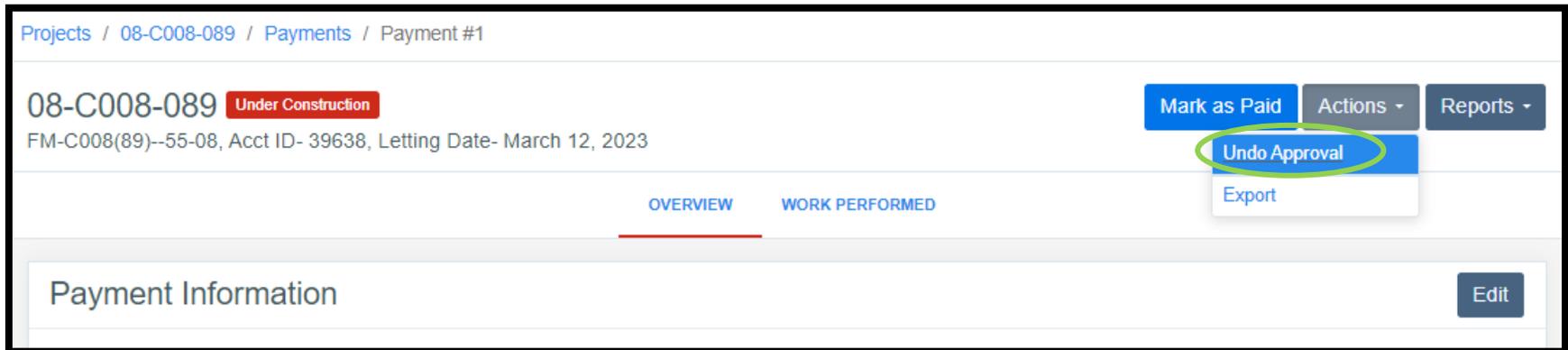
I have a Daily Report that has been excluded, and Appia won't let me issue final payment. However, it won't let me edit my Daily Report. Go to the Payments screen. Delete the final payment by clicking on the red "x" at the right end of the line containing the payment. Now, you should be able to edit (approve or delete) the excluded Daily Report. After editing the Daily Report, re-do the Final Payment.

End Date	Status	Payment	To Date	% Complete	No.
07/19/2023	Draft Final Payment	\$120.15	\$4,005.00	100.0%	3
04/15/2023	Paid	\$761.45	\$3,884.85	100.0%	2
04/04/2023	Paid	\$3,123.40	\$3,123.40	80.4%	1

K. Editing a Payment

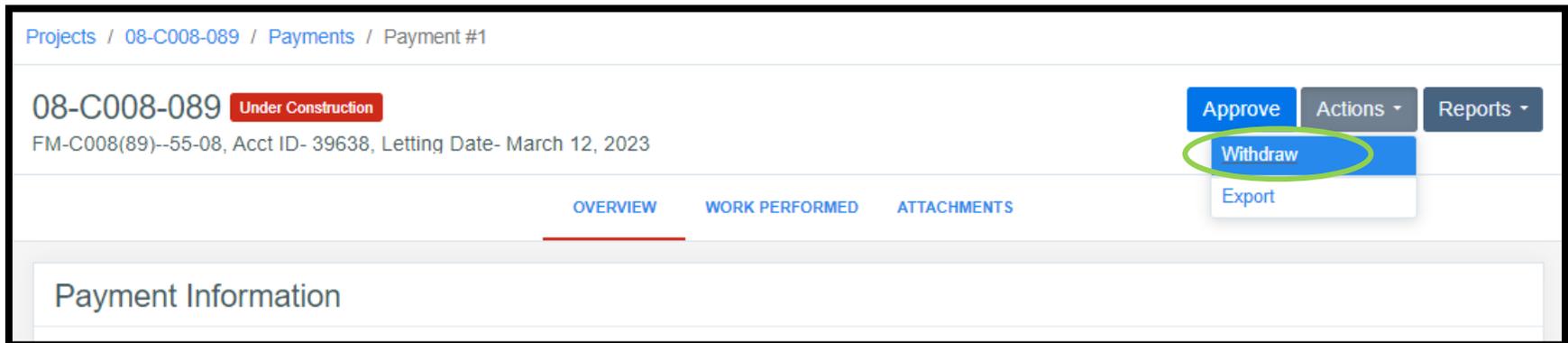
If you ever navigate away from the payments screen and need to get back in to edit a payment, simply go to the Payments tab on the left and then click on the blue circle with the pencil on the right side of the line containing the payment you want to edit. Payments can be edited until a payment date is entered. **Once a payment is marked as “Paid”, it cannot be un-approved or edited.**

Payments can be edited, even after they have been approved, **but they should not be edited after a payment has been made.** To edit an already-approved payment, first un-approve the payment by clicking on the “Actions” pull-down in the Payment and selecting “Undo Approval”.



The screenshot shows the 'Payment #1' screen for project '08-C008-089' (Under Construction). The breadcrumb trail is 'Projects / 08-C008-089 / Payments / Payment #1'. The payment details are 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. The 'Actions' menu is open, showing options: 'Mark as Paid', 'Undo Approval' (circled in green), and 'Export'. The 'Reports' menu is also visible. Below the menu are tabs for 'OVERVIEW' (selected) and 'WORK PERFORMED'. At the bottom, there is a 'Payment Information' section with an 'Edit' button.

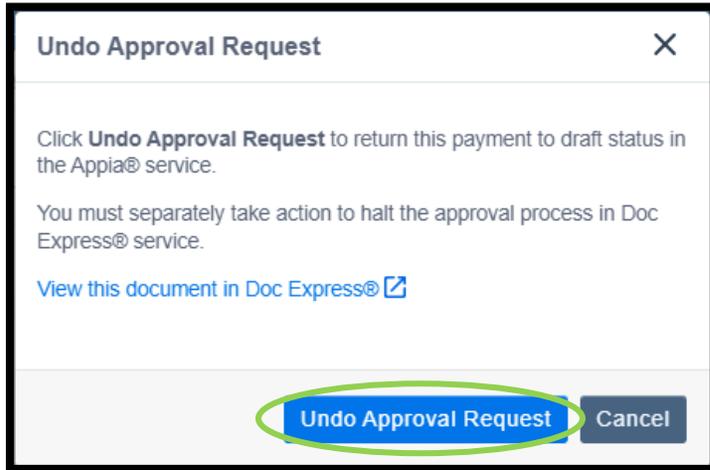
Then, go to the “Actions” pull-down again, and select “Withdraw”.



The screenshot shows the same 'Payment #1' screen. The breadcrumb trail is 'Projects / 08-C008-089 / Payments / Payment #1'. The payment details are 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. The 'Actions' menu is open, showing options: 'Approve', 'Withdraw' (circled in green), and 'Export'. The 'Reports' menu is also visible. Below the menu are tabs for 'OVERVIEW' (selected), 'WORK PERFORMED', and 'ATTACHMENTS'. At the bottom, there is a 'Payment Information' section.

If the payment was submitted for approval in Appia, the withdrawal action will take place as soon as you click on Withdraw.

If the payment has been submitted to Doc Express via Appia, a box will pop up telling you that you have to take separate action to halt the approval process in Doc Express. Click the blue “Undo Approval Request” button in the lower, right corner of the box.



Edit the payment as appropriate.

When the editing is finished, repeat the “Submit for Approval” step.

For projects using the “Submit to Doc Express” option, the revised document will be sent to Doc Express again. In Doc Express, the original document will still show, and the revised document will now appear having a “-Rev#” at the end of the file name.

The screenshot shows the 'Estimates and Vouchers' page for project '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...'. It lists two items:

- payment-1-20231204-Rev1** (circled in green): Progress Voucher, update button, Submit button, Iowa Local Systems _DEMO ACCOUNT, Transition / Actions dropdown, 0 comments, 0 supporting documents. Submitted Dec 07 2023 at 02:40 PM EST by Nicole Stinn.
- Voucher 001** (circled in red): Progress Voucher, Completed status, Actions dropdown, Iowa Local Systems _DEMO ACCOUNT, 0 comments, 0 supporting documents.

Transition it to “Complete”, and refresh the Payment in Appia to bring back in the updated status as advised in the [Submitting Payments for Approval](#) subsection under the [Approving & Submitting an Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#) section.

Send a request to the Local Systems E-Construction administrator to delete or archive the prior created incorrect payment.

County projects on the Farm-to-Market system let on or after the January 2024 letting are subject to the automated payment process. For these projects, do NOT un-approve a payment and edit it after the Wednesday at noon submittal deadline unless instructed to do so by Finance or Local Systems or without notifying Niki Stinn in Local Systems. Un-approving a payment that has already been automatically submitted for processing may result in errors or delay of payment processing or in a payment being processed that shouldn't be processed.

A payment can be deleted by clicking on the circle with the red "x" on the right side of the line.

End Date	Status	Payment	To Date	% Complete	No.
01/28/2019	Draft	\$65,415.25	\$72,753.30	5.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

Displaying all 2 payments

L. Generating a Payment Report (Payment)

Payment reports are NOT generated from the “All Reports” tab. Instead, they are generated from the “Payments” tab. To generate a payment report, click into the relevant payment and then click on the “Reports” pull-down in the top, right corner. LPAs can choose any of the reports they want for their own purposes, but the “Detailed Payment” report should be used for submittals to the Iowa DOT (reimbursement requests and CPS submittals) unless requested otherwise by the Finance Bureau or the Administering Office. Any payment report chosen can be downloaded and saved and then uploaded to Doc Express.

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES

BROS-C086(60)--8J-86 - 31961 Under Construction
Gladbrook Bridge Replacement Letting Date: October 21, 2014

Mark as Paid Actions Reports

OVERVIEW EXCLUSIONS WORK PERFORMED

Payment Information

Payment Details		Project Details	
Payment Number	Percent Complete	Prime Contractor	Project Manager
2	5.1%	PETERSON CONTRACTORS INC.	Nicole Stinn

Once the “Detailed Payment” report type is chosen from the drop-down menu, the following screen will appear. Select the “Section” radio button and then click the “Run Report” button in the top, right corner.

Projects / 29-C029-086 / Payments / Payment #1 / Detailed Payment

29-C029-086 Under Construction
BRS-SWAP-C029(86)--FF-29, Acct ID- 38636, FM-C029(90)--55-29, Acct ID- 38637, Letting Date- May 17, 2022

Detailed Payment Run Report Cancel

* Group By

Section

Item ID

Additionally, a .csv payment report can be exported by choosing the “Actions” pull-down in the top, right corner and selecting “Export”.

The screenshot displays a software interface for project management. At the top, the project ID is BROS-C086(60)--8J-86 - 31961, with a status of 'Under Construction'. Below this, the project name is 'Gladbrook Bridge Replacement' and the letting date is 'October 21, 2014'. The interface includes a sidebar with navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, and DAILY ACTIVITIES. The main content area is titled 'Payment Information' and contains two columns of data: 'Payment Details' and 'Project Details'. The 'Payment Details' column shows 'Payment Number' 2, 'Percent Complete' 5.1%, 'Payment Status' Approved, and 'Item Payment Amount' \$67,438.40. The 'Project Details' column shows 'Prime Contractor' PETERSON CONTRACTORS INC. and 'Project Manager' Nicole Stinn. An 'Export' option is highlighted in the 'Actions' menu in the top right corner.

Payment Details		Project Details	
Payment Number	2	Prime Contractor	PETERSON CONTRACTORS INC.
Percent Complete	5.1%	Project Manager	Nicole Stinn
Payment Status	Approved	Managing Office	Tama County Highway Department
Item Payment Amount	\$67,438.40		

A few sample pages of the "Detailed Payment" report are shown here.



Tama County Highway Department

Detailed Payment

BROS-C086(60)--8J-86 - 31961

Description Gladbrook Bridge Replacement
Letting Date: October 21, 2014

Payment Number 2

Pay Period 01/03/2019 to 01/28/2019

Prime Contractor PETERSON CONTRACTORS INC.
104 BLACK HAWK
REINBECK, IA

Payment Status Approved

Awarded Project Amount \$1,457,851.99

Authorized Amount \$1,457,851.99

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE										
0010	2104-2710020	CY	\$4.500	5,700.000	1,066.667	0.000	1,066.667	1,066.667	\$4,800.00	\$4,800.00
EXCAVATION, CL 10, CHANNEL										

Detailed Payment:
BROS-C086(60)--8J-86 - 31961

04/06/2021
Page 1 of 9

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
0120	2501-0201057	LF	\$33.350	1,260.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
PILES, STEEL, HP 10 X 57										
0130	2501-0201473	LF	\$39.480	1,540.000	770.000	0.000	770.000	770.000	\$30,399.60	\$30,399.60
PILES, STEEL, HP 14 X 73										
0140	2501-5478073	LF	\$76.100	396.000	408.000	0.000	408.000	408.000	\$31,048.80	\$31,048.80
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73										
0150	2501-6335010	LF	\$38.620	180.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
PREBORED HOLE										
0160	2507-2638650	SY	\$109.700	27.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
BRIDGE WING ARMORING - EROSION STONE										
0170	2507-3250005	SY	\$2.500	2,805.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
ENGINEERING FABRIC										
0180	2507-6800061	TON	\$33.000	2,180.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
REVTMENT, CLASS E										
0190	2533-4980005	LS	\$82,187.500	1.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
MOBILIZATION										
0200	2536-6745045	LS	\$6,300.000	1.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
RMVL OF ASBESTOS										
Section Totals:									\$66,248.40	\$66,248.40
Section: 2 - ROADWAY ITEMS										

Detailed Payment:
BROS-C086(60)--8J-86 - 31961

04/06/2021
Page 3 of 9

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
Total Payments:									\$67,438.40	\$75,003.40

Time Charges

Time Limit	Original Deadline	Authorized Deadline	Charges This Period	Damages This Period	Days Completed To Date	Days Remaining To Date	Damages To Date
Late Start Date: 04/16/15	120.0 Days	120.0 Days	0.0 Days	\$0.00	0.0 Days	120.0 Days	\$0.00
Total Damages:							\$0.00

Summary

Current Approved Work:	\$67,438.40	Approved Work To Date:	\$75,003.40
Current Stockpile Advancement:	\$0.00	Stockpile Advancement To Date:	\$0.00
Current Stockpile Recovery:	\$0.00	Stockpile Recovery To Date:	\$0.00
Current Retainage:	\$2,023.15	Retainage To Date:	\$2,250.10
Current Retainage Released:	\$0.00	Retainage Released To Date:	\$0.00
Current Liquidated Damages:	\$0.00	Liquidated Damages To Date:	\$0.00
Current Adjustment:	\$0.00	Adjustments To Date:	\$0.00
Current Payment:	\$65,415.25	Payments To Date:	\$72,753.30
Previous Payment:	\$7,338.05	Previous Payments To Date:	\$7,338.05

Detailed Payment:
BROS-C086(60)-8J-86 - 31961

04/06/2021
Page 8 of 9

Note: A "Stockpiles" section will be shown on this final page as well if any stockpile entries have been made.

13 - Contractors

(Reserved for Contractors instructions)

This section is reserved for future instructions on the Contractors tab.

14 - Funding

To access the Funding details click on the "Funding" tab in the left menu.

The screenshot displays a software interface with a dark blue sidebar on the left containing navigation options: TIME LIMITS, CHANGE ORDERS, PUNCH LIST, PAYMENTS, CONTRACTORS, and PHOTOS. The 'FUNDING' option is highlighted with a red background and a green circle. The main content area is divided into several sections:

- Project Information:**
 - Prime Contractor: CEDAR VALLEY CORP., LLC.
 - Project Manager: Niki Stinn
 - Managing Office: Local Systems
 - Created By: Douglas Heeren
- Financial Summary:**
 - Amount paid so far: \$0.00
 - 0% of your Awarded: \$4,553,445.96
 - 0% of your Authorized: \$4,580,158.96
- Important Dates:**
 - Date Created: Dec 5, 2022
 - Notice to Proceed: Dec 20, 2022
- Progress:**
 - Time Complete: 0 Days | Time Remaining: 82 Days
 - Amount Posted: \$300.00 | Awarded Amount: \$4,553,445.96
 - Amount Posted: \$300.00 | Authorized Amount: \$4,580,158.96
- Retainage:**
 - Total Retainage: \$0.00
 - Retainage Released: \$0.00

Clicking on Funding in the left menu will bring you to the Funding screen. Existing funding packages, sources, and associated amounts will be displayed. These amounts should match the funding sources shown on the Final Highway Funding sources document in Doc Express. LPAs do not generally need to be concerned with exactly what the funding codes mean as long as the values and proportions look generally correct. However, if the LPA does want/need to know about the exact funding source codes, please reach out to the Secondary Roads Engineer (counties) or the Urban Engineer (cities) in the [Local Systems Bureau](#).

Note: County FM funding will always be a CO##F or CO##F# code. Local county funding will be CO##L, and local city funding will be M####. With the ## or #### being the county or city number, respectively.

21-C021-153 Under Construction

STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

[Edit](#)

Funding

Fund Source	Fund Package					
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		001 CLAY CO LOCAL 21-C021-153		001 CLAY CO FM 21-C021-154	
CO21F	\$0.00	0.000%	\$0.00	0.000%	\$1,783,790.04	100.000%
Y238	\$2,786,468.92	100.000%	\$0.00	0.000%	\$0.00	0.000%
CO21F1	\$0.00	0.000%	\$0.00	0.000%	\$0.00	0.000%
CO21L	\$0.00	0.000%	\$9,900.00	100.000%	\$0.00	0.000%

Items

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS					
0010	2110-3825010	760.000	TON	\$7.900	\$6,004.00
GRANULAR MATERIAL					
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 760.000					
0020	2121-7425020	9,550.000	TON	\$32.760	\$312,858.00

Show funding in dollars? YES NO

To add a new funding package or edit an existing package, click on the blue “Edit” button in the top, right corner.

21-C021-153 Under Construction
 STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Funding Edit

Fund Source	Fund Package	
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	001 CLAY CO LOCAL 21-C021-153 001 CLAY CO FM 21-C021-154
CO21F	\$0.00 0.000%	\$0.00 0.000% \$1,783,790.04 100.000%
Y238	\$2,786,468.92 100.000%	\$0.00 0.000% \$0.00 0.000%
CO21F1	\$0.00 0.000%	\$0.00 0.000% \$0.00 0.000%
CO21L	\$0.00 0.000%	\$9,900.00 100.000% \$0.00 0.000%

Items

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS					
0010	2110-3825010	760.000	TON	\$7.900	\$6,004.00
GRANULAR MATERIAL					
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 760.000					
0020	2121-7425020	9,550.000	TON	\$32.760	\$312,858.00

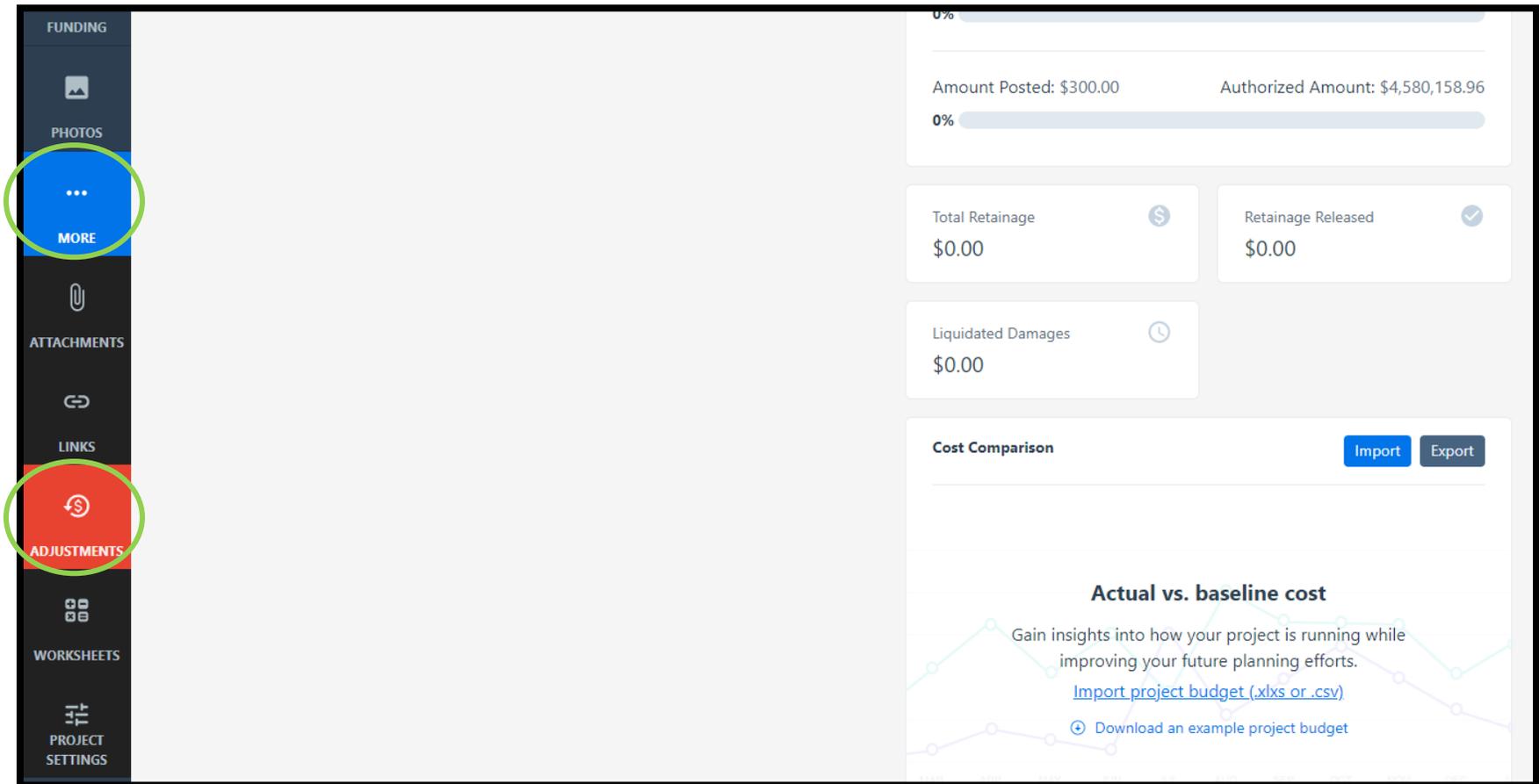
Show funding in dollars? NO

From this point, follow the guidance in Section 4 - Creating Funding Packages and Sources in the [Appia Project Creation & Account Management Instructions](#).

15 - More: Adjustments

Do NOT use Adjustments on ANY project administered through the Iowa DOT. The DOT requires any payment adjustments to be made via change order.

If using Adjustments for non-DOT administered projects, Adjustments can be accessed by clicking on More in the left menu and then selecting “Adjustments” from the expanded sub-menu.



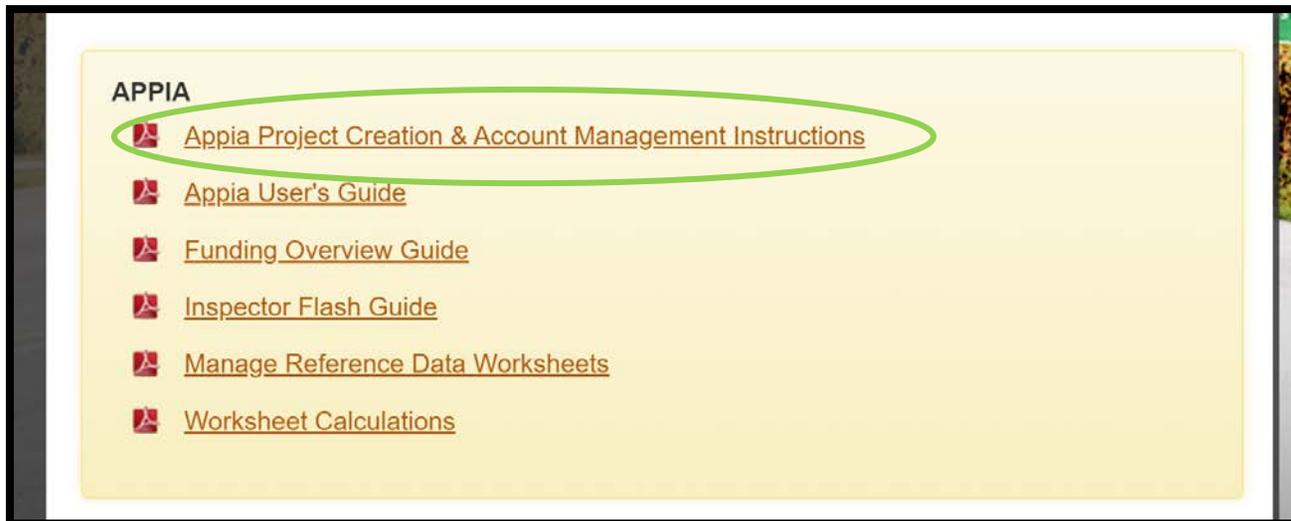
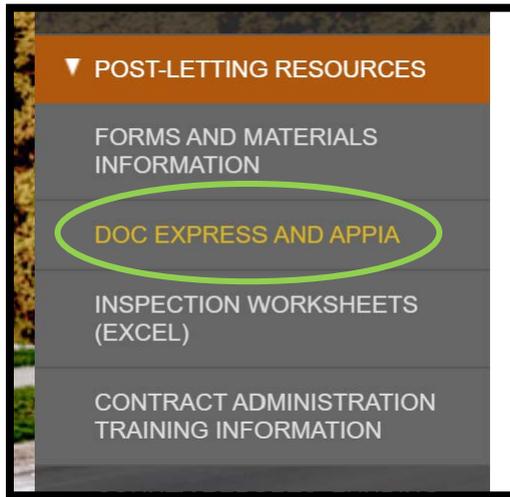
16 - More: Worksheets

(Reserved for Worksheets instructions)

This section is reserved for future instructions on Worksheets.

17 - More: Project Settings

For instructions on adjusting project settings, please see the “Project Settings” section in the “[Project Creation and Account Management Instructions](#)” located on the [Doc Express and Appia](#) website under “Post-Letting Resources”.



18 - Exporting Data: Export Reports (For Audit/Review by Local Systems)

(System Administrator access level required.)

You can download specific reports for any given project at any time. Available reports include:

- Change Order Details
- Daily Report*
- Daily Diary
- Detailed Payment
- Item History
- Item Quantity Summary**
- Payment Invoice
- Payment Invoice by Fund (Fund Packages Only)
- Payment Invoice (with Fund Sources)
- Time Charges
- Worksheet History***

*This export will generate a file with PDF summaries of each of the daily reports. These PDFs can be merged together if desired.

** This export will generate a file with individual PDF summaries for each bid item with all of the item posting (quantity entry) information including any locations or remarks recorded. **When a project is ready for audit/review, the Local Systems field staff will require the local agency to upload each of these Item Quantity Summary reports to DocExpress.**

***This export will generate a file with individual PDF summaries for each of the bid items with the items' associated Worksheet entries. **If Worksheets are used, these Worksheet History summaries will need to be uploaded (per item) to DocExpress for audit.**

To download these reports, click on “Export Data” in the left menu on the main project listing screen. Then click on “Export Reports” in the expanded sub-menu.

The screenshot displays the 'Export Projects' interface. On the left is a dark sidebar menu with the following items: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA (highlighted with a green circle), EXPORT DATABASE, EXPORT PROJECTS, EXPORT REPORTS (highlighted with a red circle), and HELP. The main content area is titled 'Export Projects' and contains a 'Projects' section with a search bar. Below the search bar is a table with the following columns: Project ID, Description, and Project Status. The table lists several projects, many of which are marked as 'Imported'.

Project ID	Description	Project Status
03-C003-062 <small>Imported</small>	03-C003-062	Under Construction
11-C011-071 <small>Imported</small>	STP-S-C011(71)--5E-11 - 29427	Under Construction
36-C036-074 JSON TEST/FINANCE <small>Imported</small>		Under Construction
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	Under Construction
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	Under Construction
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	Under Construction
BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	Under Construction
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	Under Construction
BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_05_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_06_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_07_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_07_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction

You will be brought to this “Export Reports” screen. Select the desired project from the pull-down menu and enter the desired dates in the “Start Date” and “End Date” boxes. Reports will only be generated for the date range covered between the start and end dates entered. In the “Reports” column on the right side, check the box for any/all reports you want to be generated. Click on “Export”.

Export Reports

You can only export reports for under construction projects.

* Project
27-C027-079

* Start Date
10/01/2021

* End Date
05/23/2022

* Reports

- Select All
- Change Order Details
- Daily Report
- Daily Diary
- Detailed Payment
- Item History
- Item Quantity Summary
- Payment Invoice
- Payment Invoice By Fund (Fund Packages only)
- Payment Invoice with Fund Sources
- Time Charges
- Worksheet History

infotech

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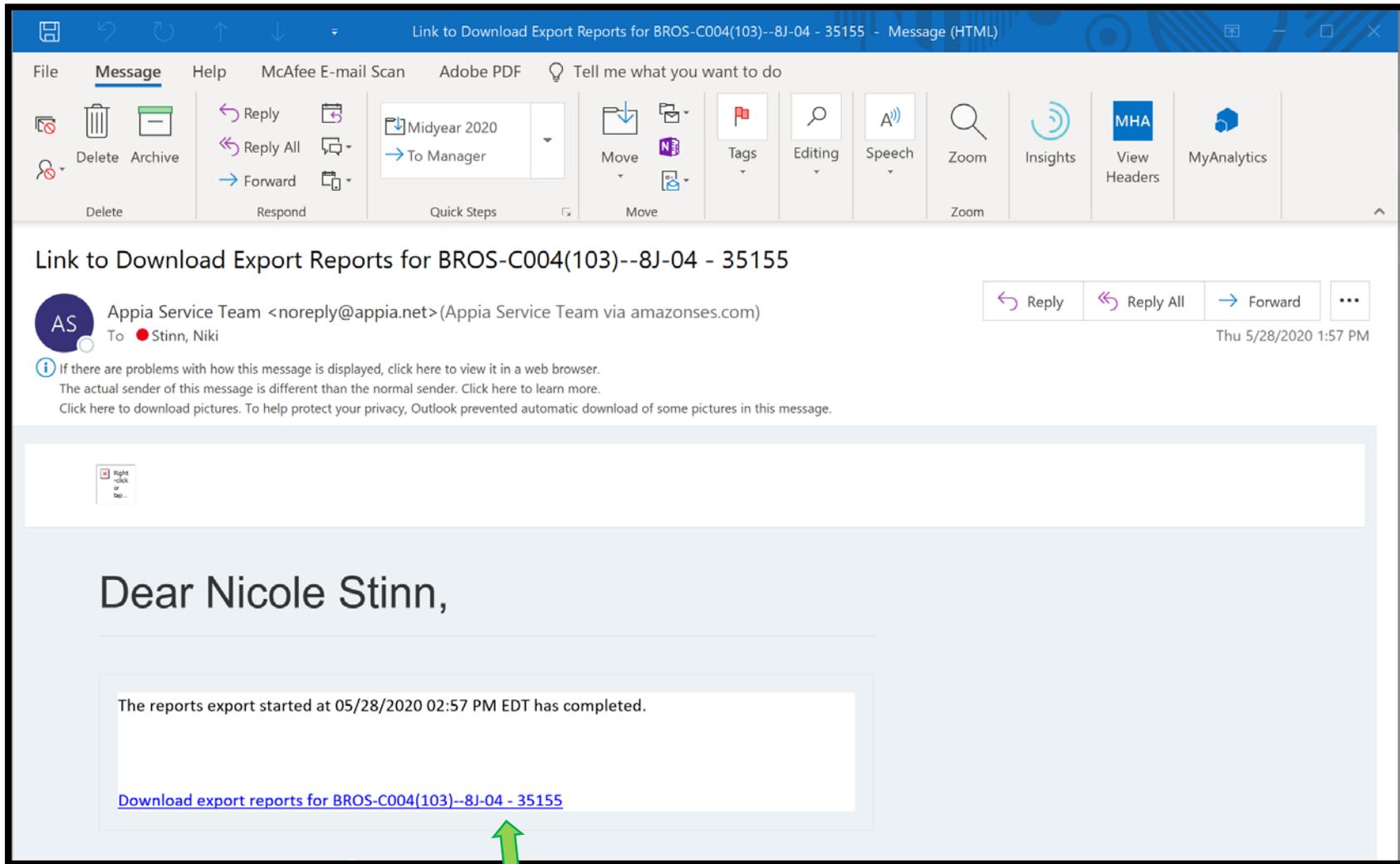
The two specific exports that Local Systems staff will need for auditing/review purposes are “Daily Report” and “Item Quantity Summary”. Once extracted the “Daily Report” reports can all be merged into one PDF and placed in the Diaries drawer in Doc Express. The Item Quantity Summary reports should each be named according to the item and the naming convention and uploaded to Doc Express in the “Items and Materials” drawer as shown in the [Doc Express naming convention](#).

You will be brought back to the project listing screen where a green ribbon will be displayed across the top saying the export is in progress and that you will receive an email with a link to download the exported reports.

The screenshot shows a web application interface for project management. At the top, a green notification banner states: "Export is in progress. You will receive an email with a link to download the export once it is done." Below this, the page title is "My Projects" and the status is "Under Construction". A search bar labeled "Find Project" is present. On the right, there are buttons for "Create Project" and "Import Project", and a status filter set to "Under Construction". A table lists several projects, including "36-C035-074 JSON TEST/FINANCE" with an "Imported" tag. A sidebar on the left contains navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. Two "Pro tip" callouts are visible: one about adding projects to favorites and another about selecting different statuses.

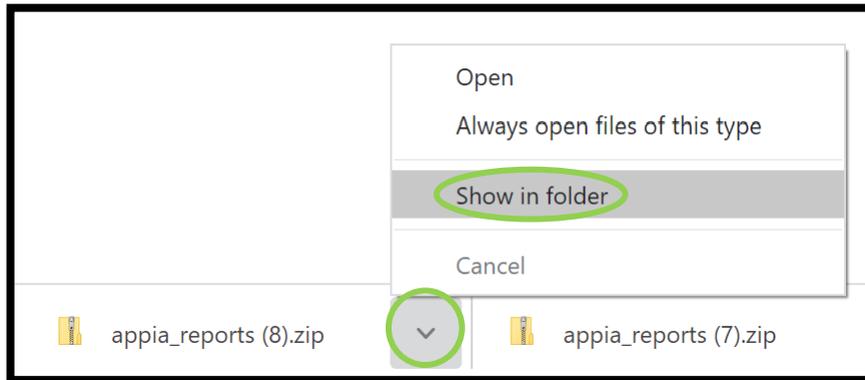
	Description	
★	03-C003-062	⌵
★	STP-S-C011(71)--5E-11 - 29427	⌵
★	36-C035-074 JSON TEST/FINANCE Imported	⌵
★	BHM-SWAP-1827(684)--SA-82-1 12345	⌵
★	BROS-C004(103)--8J-04 - 35155	⌵
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	⌵
★	BROS-C086(60)--8J-86 - 31961	⌵

The email will look like this.

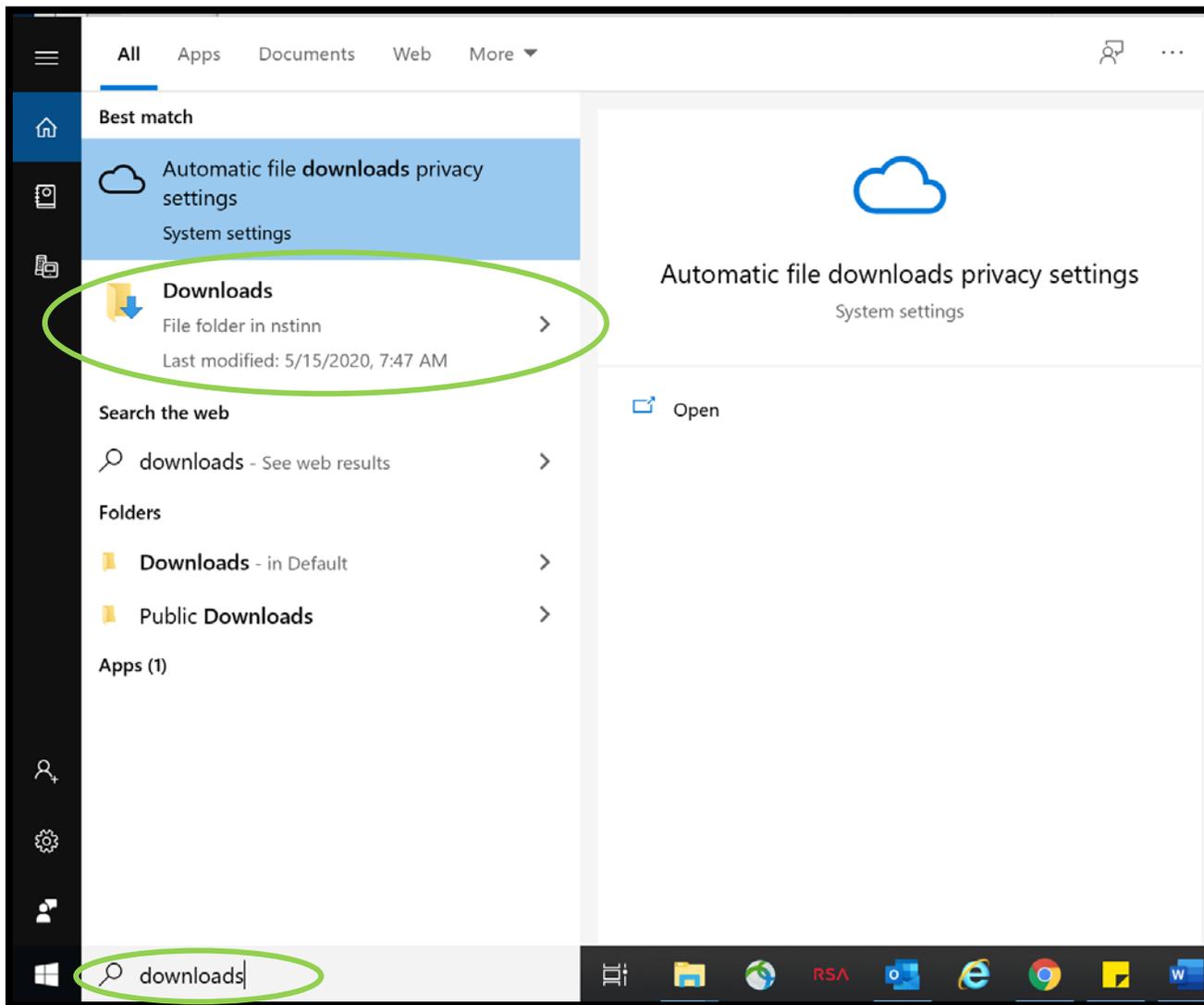


Click on the link here to download the project data.

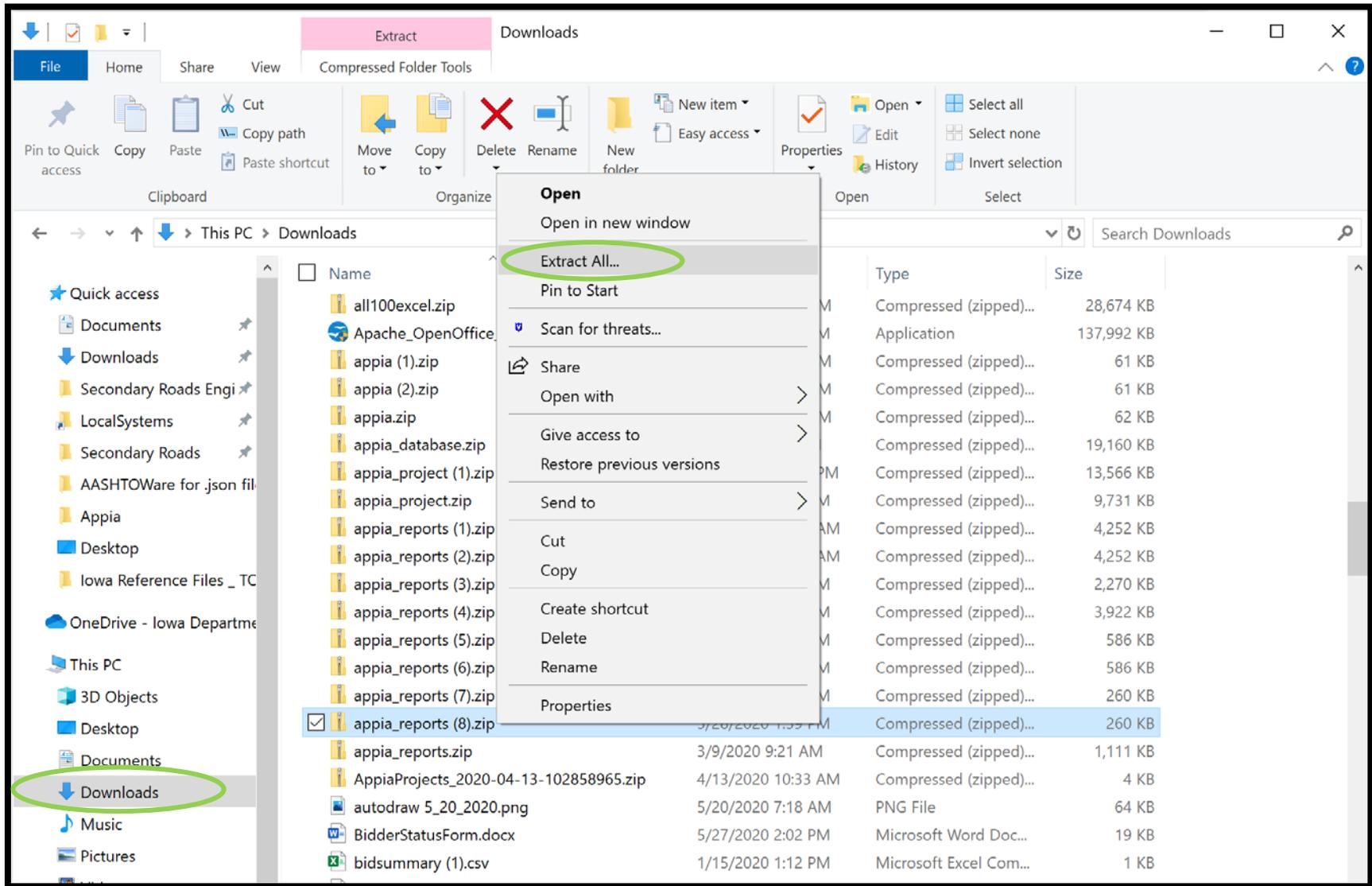
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



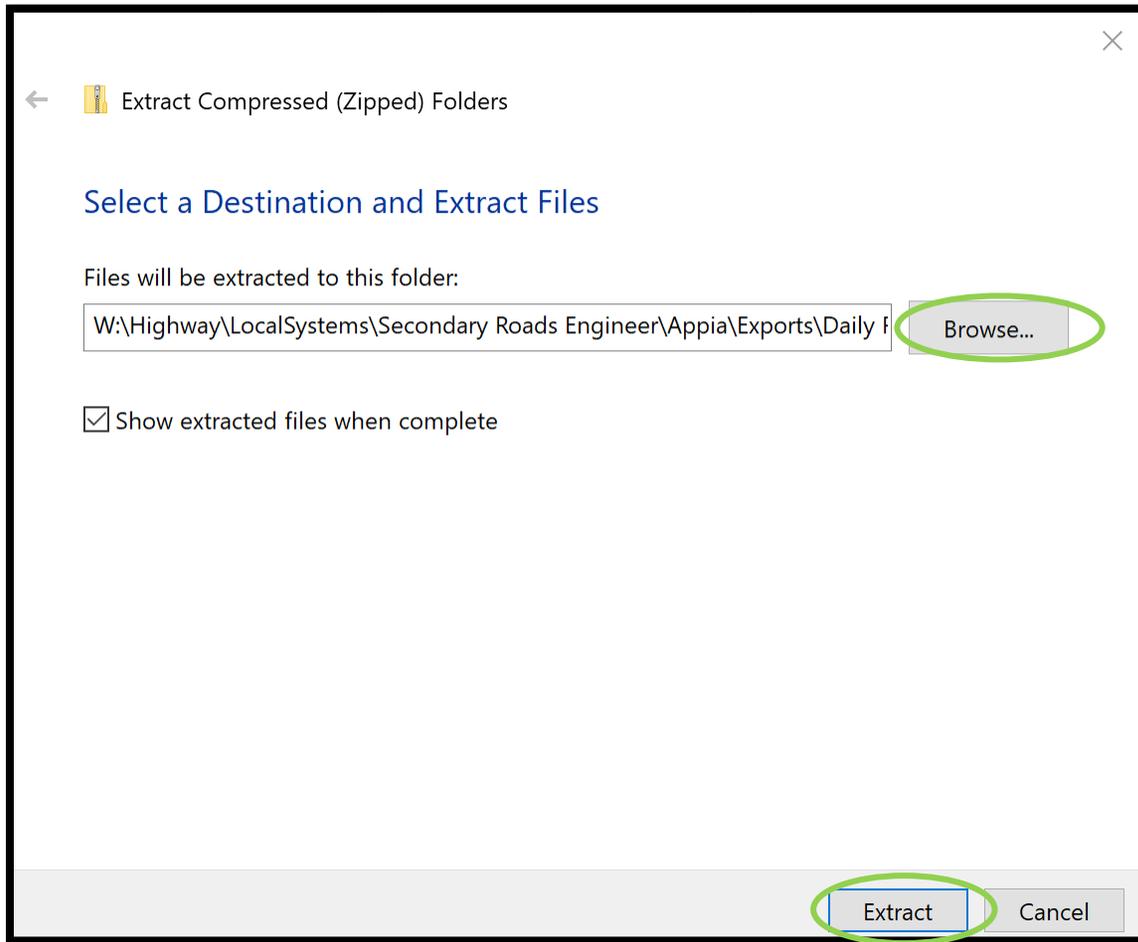
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



Whichever path is taken to download the file, you should arrive here. Right click on your file and select “Extract All...”.



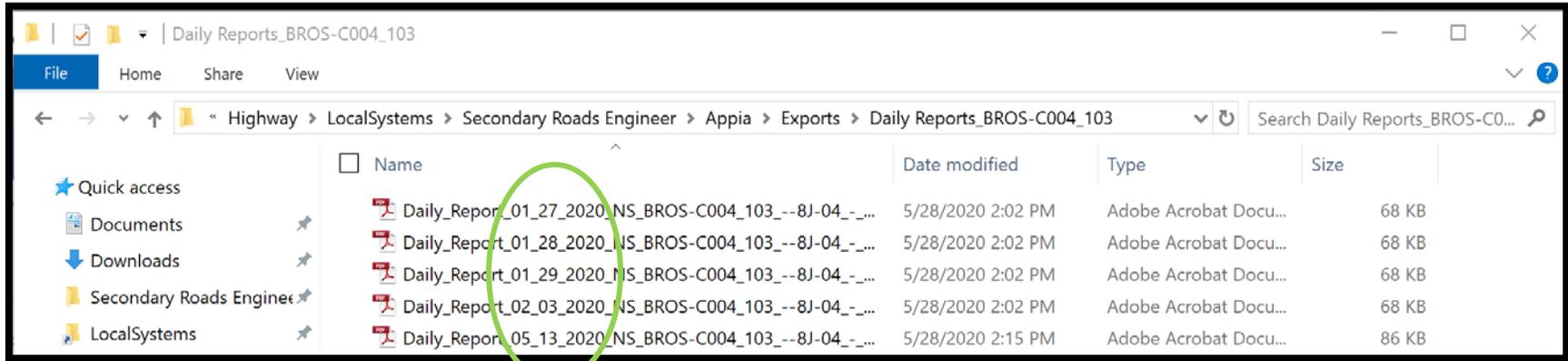
This window will pop up. Browse to find the location where you would like to save your project data.



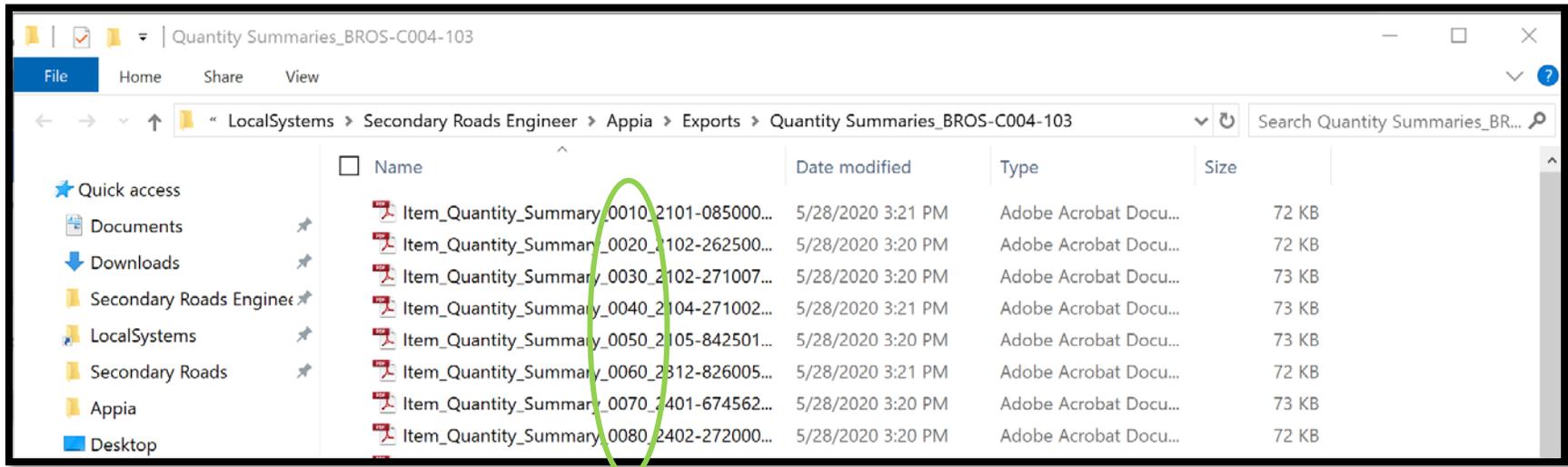
When you have selected the appropriate file in which to save your data, click "Extract".

A new file explorer window will open showing the folder with the extracted files.

Here is a sample of the export containing the Daily Report files. Note the dates in the file names.



Here is a sample of the export containing the Item Quantity Summary files. Note the Item numbers in the file names.



A sample "Daily Report" report is shown here.



Appanoose County Secondary Roads

Daily Report

BROS-C004(103)--8J-04 - 35155

Description

On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.

Report Date

05/13/2020

Prime Contractor

CUNNINGHAM-REIS, LLC
35647 RICHLAND ROAD
VAN METER, IA

Status

Approved

Weather

Temperature

Created By

Nicole Stinn on 05/28/2020 03:09 PM EDT

Approved By

Nicole Stinn on 05/28/2020 03:14 PM EDT

Remarks

The contractor was on site today performing Class 10 Roadway and Borrow Excavation on the northwest corner of the bridge. They also removed the east abutment.

Personnel

Crew #1 – CUNNINGHAM-REIS, LLC

Worker Type #1 (3)	10.00 hours
Worker Type #2 (1)	10.00 hours

1 crew

Equipment

Description	Active	Idle	Comments	Contractor
CUNNINGHAM-REIS, LLC				
1 equipment				

Daily Report:
BROS-C004(103)--8J-04 - 35155

05/28/2020
Page 1 of 2

Item Postings

Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
Section: 0001 - ITEMS FOR A 100'-0 X 24'-6 CONTINUOUS CONCRETE SLAB BRIDGE					
0030	2102-2710070	CY	\$5.000	555.556	\$2,777.78
EXCAVATION, CL 10, RDWY+BORROW					
Contractor: CUNNINGHAM-REIS, LLC					
Funding Details					
Default Fund Package				555.556	\$2,777.78
0070	2401-6745625	LS	\$10,000.000	0.250	\$2,500.00
RMVL OF EXISTING BRIDGE					
Contractor: CUNNINGHAM-REIS, LLC					
Funding Details					
Default Fund Package				0.250	\$2,500.00
2 item postings				Total Posted Amount: \$5,277.78	

Daily Report:
BROS-C004(103)--8J-04 - 35155

05/28/2020
Page 2 of 2

A sample "Item Quantity Summary" report is shown here. Note the remarks and location information shown. This is the most similar report in Appia to the standard DOT .xlsx "E" sheets widely used for recording quantities.



Appanoose County Secondary Roads

Item Quantity Summary

BROS-C004(103)--8J-04 - 35155

Project Description

On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.

Line Number

0030

Item

2102-2710070

Description

EXCAVATION, CL 10, RDWY+BORROW

Unit

CY

Unit Price

\$5.00

Original Quantity

1,600.000

Quantity Paid

0.000

Authorized Quantity

1,600.000

Quantity Placed but not Paid

1,444.445

Total Quantity Placed

1,444.445

Amount Paid

\$0.00

Quantity Remaining

155.555

Amount Unpaid

\$7,222.23

Pending Quantity

0.000

Authorized Amount

\$8,000.00

Postings

Daily Report Date	Created By	Status	Quantity Placed	Total Placed	Quantity Remaining
05/13/2020	Nicole Stimm	Approved	555.556	1,444.445	155.555
05/12/2020	Nicole Stimm	Approved	888.889	888.889	711.111
Station: From 100 + 0.00 To 100 + 80.00					
Location: 13' RT to 93' RT					
Remarks: Southwest corner of bridge. Irregular area.					
2 postings					

Item Quantity Summary:
BROS-C004(103)--8J-04 - 35155

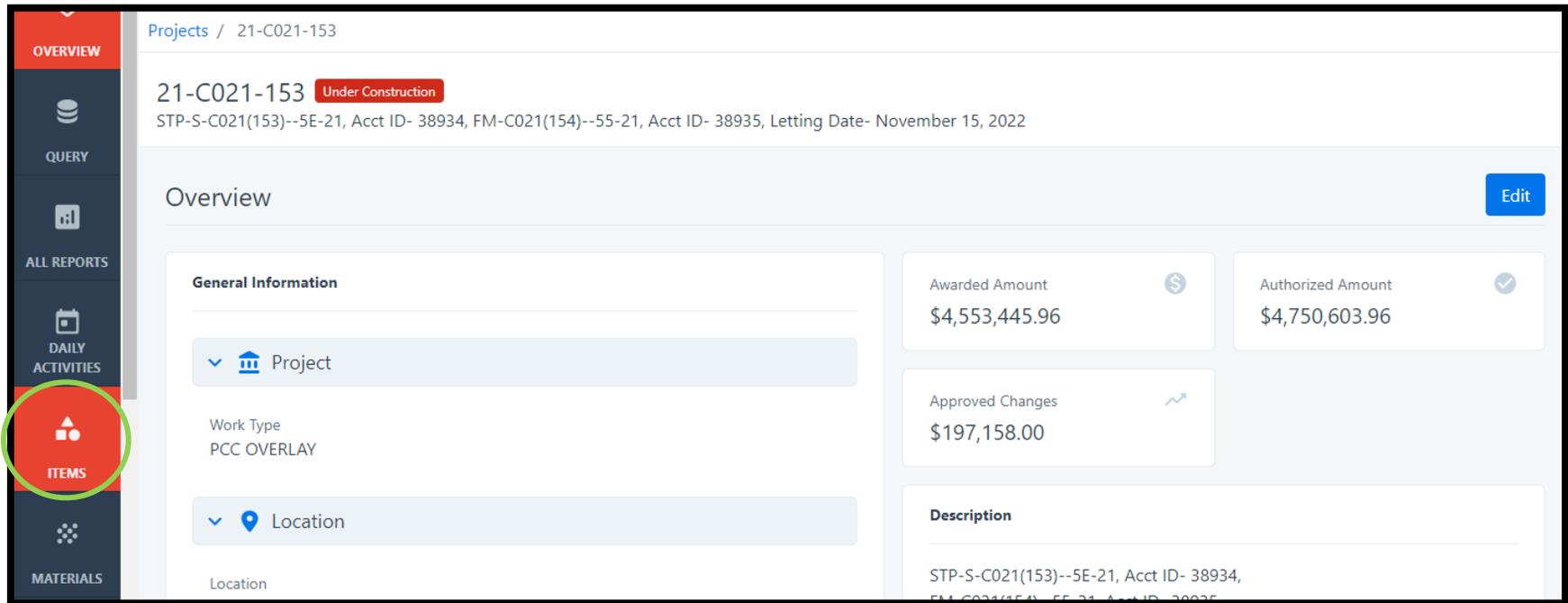
05/28/2020
Page 1 of 1

19 - EZ Forms Exports

A. EZ Forms (E-Sheets)

The EZ Forms workbook is an automated workbook that assembles all the E-Sheets for a contract. It provides integrated tracking capabilities for item certifications and testing requirements and includes links to specification sections and other useful references. The EZ Forms workbook is not yet available online. However, a copy can be requested from the LPA's [Local Systems Regional Field Technician](#).

You can export an Items report from Appia that can be loaded into the EZ Forms workbook. To generate the Items report for the EZ Forms Workbook, click on Items in the left menu.



The screenshot displays the Appia software interface for project 21-C021-153. The left sidebar contains navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS (highlighted with a red circle), and MATERIALS. The main content area shows the project overview, including a status indicator 'Under Construction' and a list of account IDs. The 'Overview' section is divided into 'General Information' and 'Description'. The 'General Information' section includes a 'Project' dropdown menu, 'Work Type' (PCC OVERLAY), and a 'Location' dropdown menu. The 'Description' section contains the project details. Key financial metrics are displayed in a grid:

Metric	Value
Awarded Amount	\$4,553,445.96
Authorized Amount	\$4,750,603.96
Approved Changes	\$197,158.00

In the Items screen, click on the gray “Actions” near the upper, right corner. Then select, “Export CSV” from the pull-down menu.

Projects / 21-C021-153 / Items

21-C021-153 Under Construction Reports

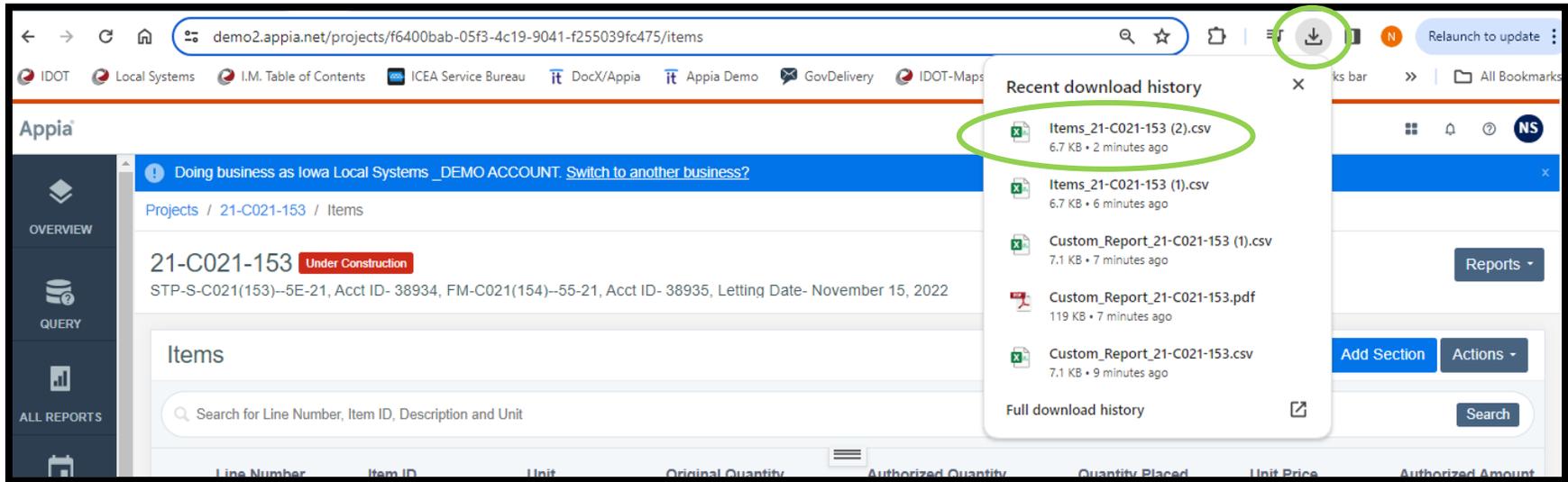
STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022

Items

Search for Line Number, Item ID, Description and Unit

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS Add Unattached							
0010	2110-3825010	TON	760.000	760.000	0.000	\$7.900	\$6,004.00
GRANULAR MATERIAL							
Quantity Placed				Quantity Paid			
0.0%				0.0%			
0020	2121-7425020	TON	9,550.000	9,550.000	0.000	\$32.760	\$312,858.00
GRANULAR SHOULDERS, TYPE B							
Quantity Placed				Quantity Paid			

A .csv file will download in your browser. This is an example of where the download can be accessed from the Google Chrome browser. Other browsers will be different.



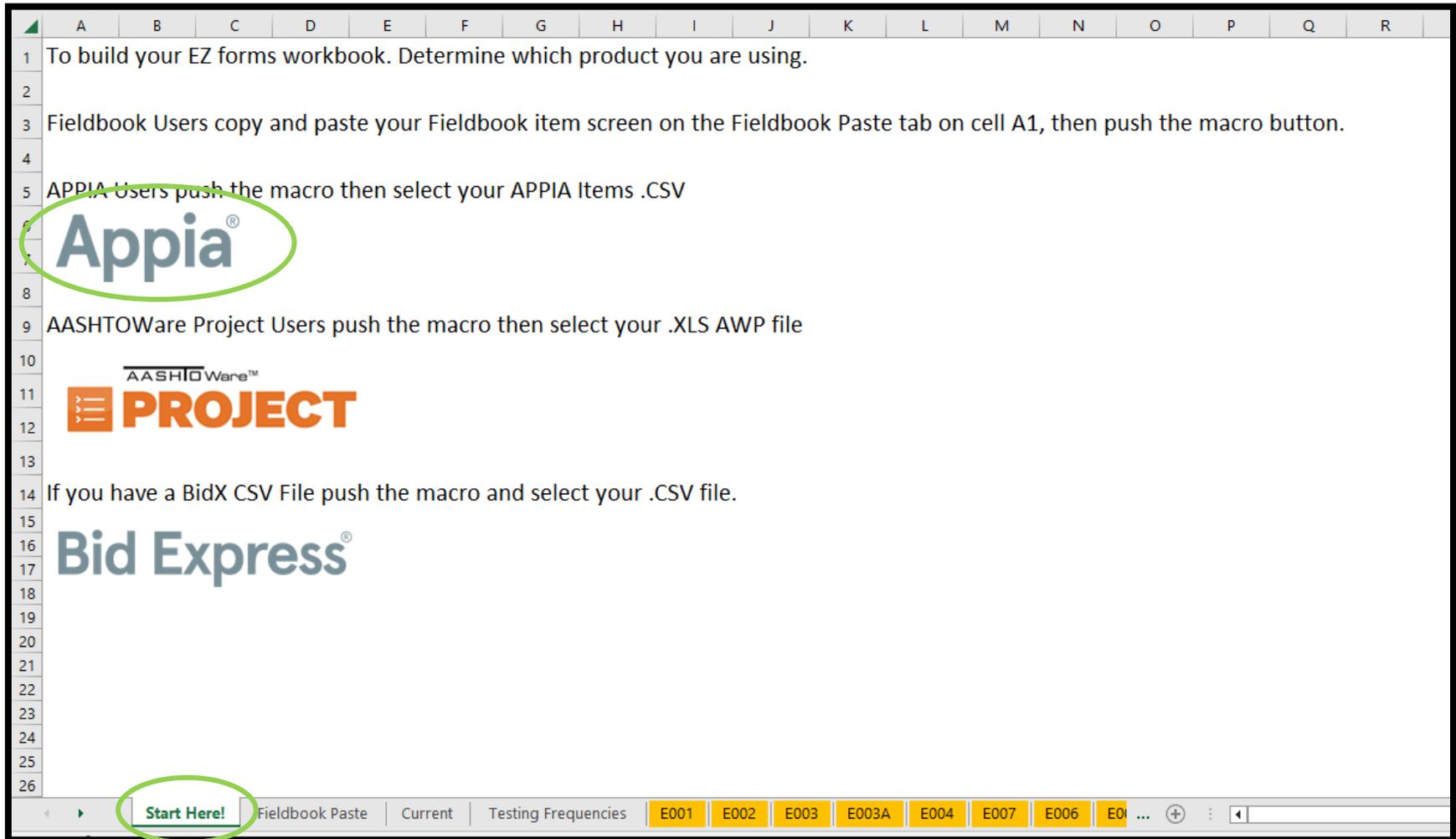
The downloaded file will look like the following. It should have no header information except the column labels and should contain these exact columns in this exact order.

- Section Number
- Section Description
- Line Number
- Item ID
- Description
- Supplemental Description
- Unit
- Original Qty
- Authorized Qty
- Qty Placed
- Unit Price
- Authorized Amount

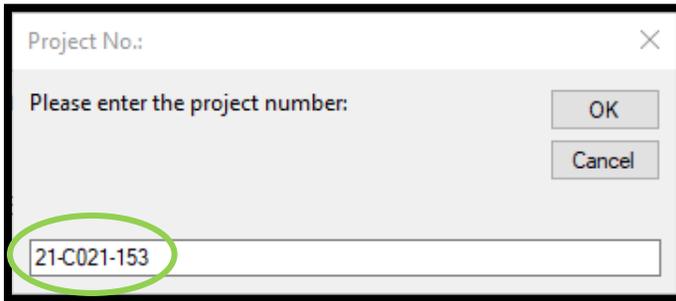
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Section No	Section Desc	Line Num	Item ID	Description	Supplement	Unit	Original Qty	Authorized Qty	Placed Qty	Unit Price	Authorized Amount	
2	1	STP-S-C02	10	2110-3825	GRANULAR MATERIAL		TON	760	760	0	7.9	6004	
3	1	STP-S-C02	20	2121-7425	GRANULAR SHOULDER		TON	9550	9550	0	32.76	312858	
4	1	STP-S-C02	30	2214-5145	PAVEMENT SCARIFYING		SY	74947	74827	0	1.35	101016.5	
5	1	STP-S-C02	40	2301-0690	BRIDGE APPROACH		SY	97.8	97.8	0	200	19560	
6	1	STP-S-C02	50	2301-1032	STANDARD OR SLIP		FSY	2813	2813	210	68.15	191706	
7	1	STP-S-C02	60	2301-9091	RUMBLE STRIP PANEL		EACH	6	9	0	25	225	
8	1	STP-S-C02	70	2310-5151	PORTLAND CEMENT		CY	12491	12491	20	112.95	1410858	
9	1	STP-S-C02	80	2310-5151	PORTLAND CEMENT		SY	74947	74947	0	4.5	337261.5	
10	1	STP-S-C02	90	2315-8275	SURFACING, DRIVEWAY		TON	1140	1140	0	35.05	39957	
11	1	STP-S-C02	100	2316-0000	PAYMENT ADJUSTMENT		EACH	58320	58320	0	1	58320	
12	1	STP-S-C02	110	2505-4008	REMOVAL OF STEEL		LF	260	260	0	15	3900	
13	1	STP-S-C02	120	2505-4008	STEEL BEAM GUARDRAIL		EACH	4	4	0	2000	8000	
14	1	STP-S-C02	130	2505-4021	STEEL BEAM GUARDRAIL		EACH	4	4	0	300	1200	
15	1	STP-S-C02	140	2505-4021	STEEL BEAM GUARDRAIL		EACH	4	4	0	3418.5	13674	
16	1	STP-S-C02	150	2510-6745	REMOVAL OF PAVEMENT		SY	2813	2813	0	3.26	9170.38	
17	1	STP-S-C02	160	2526-8285	CONSTRUCTION SURVEY		LS	1	1	0	55000	55000	
18	1	STP-S-C02	170	2527-9263	PAINTED PAVEMENT		STA	851.07	851.07	0	17	14468.19	
19	1	STP-S-C02	180	2528-2518	SAFETY CLOSURE		EACH	16	16	0	125	2000	
20	1	STP-S-C02	190	2528-8445	TRAFFIC CONTROL		LS	1	1	0	28525	28525	
21	1	STP-S-C02	200	2533-4980	MOBILIZATION		LS	1	1	0	150390	150390	
22	1	STP-S-C02	210	2555-0000	DELIVER AND STOCK		LS	1	1	0	5475	5475	
23	1	STP-S-C02	8001	2217-1000	RUBBLIZED PAV'T		SY	0	160	10	30	4800	
24	1	STP-S-C02	8002	2301-0690	BRIDGE APPROACH		SY	0	100	0	220	22000	
25	1	STP-S-C02	8010	2107-3825	GRANULAR MATERIAL		CY	0	0	0	0	0	
26	2	FM-C021(	220	2110-3825	GRANULAR MATERIAL		TON	319	319	0	7.9	2520.1	
27	2	FM-C021(	230	2121-7425	GRANULAR SHOULDER		TON	6330	6330	0	32.76	207370.8	
28	2	FM-C021(	240	2214-5145	PAVEMENT SCARIFYING		SY	50893	50893	0	1.35	68705.55	
29	2	FM-C021(	250	2301-1032	STANDARD OR SLIP		FSY	1097	1397	10	68.15	95205.55	
30	2	FM-C021(	260	2301-9091	RUMBLE STRIP PANEL		EACH	4	4	0	25	100	
31	2	FM-C021(	270	2310-5151	PORTLAND CEMENT		CY	8482	8482	50	112.95	958041.9	
32	2	FM-C021(	280	2310-5151	PORTLAND CEMENT		SY	50893	50893	0	4.5	229018.5	

Save the downloaded file to the desired location on your computer or server. Do NOT change the .csv file extension.

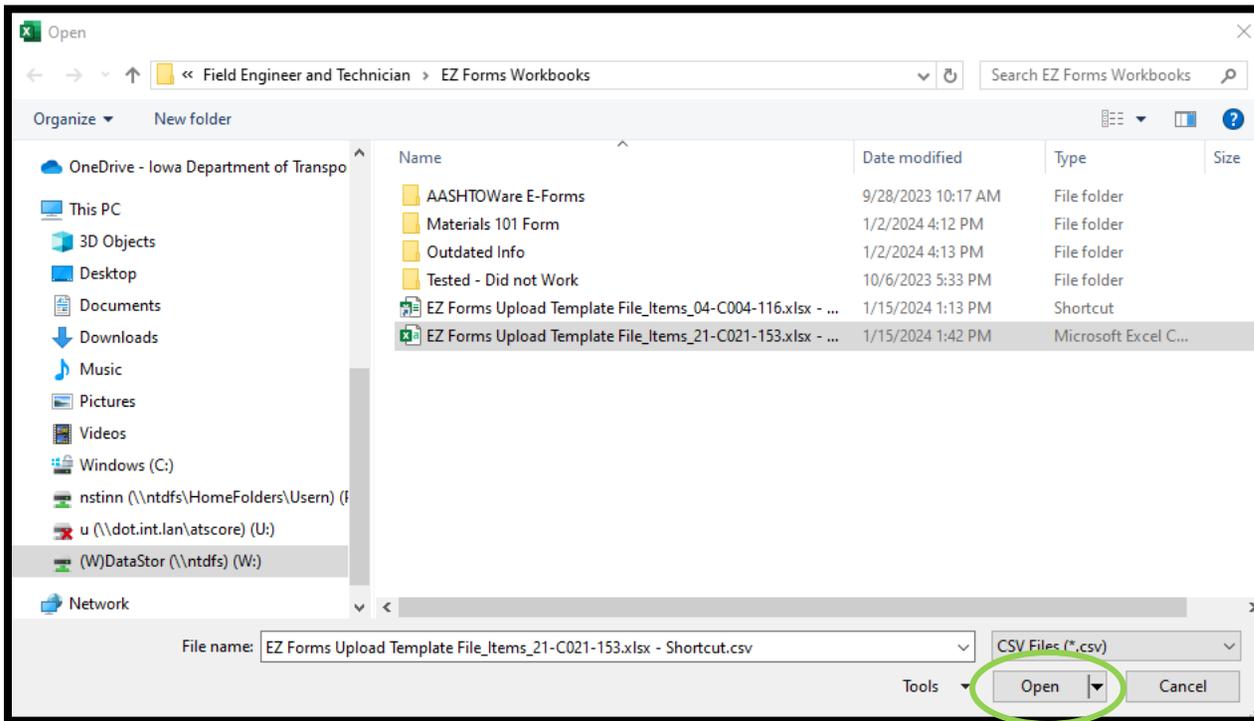
Open the EZ Forms Workbook. On the “Start Here!” tab, there is an “Appia” button. Push this button to begin uploading your saved Appia file to the EZ Forms Workbook.



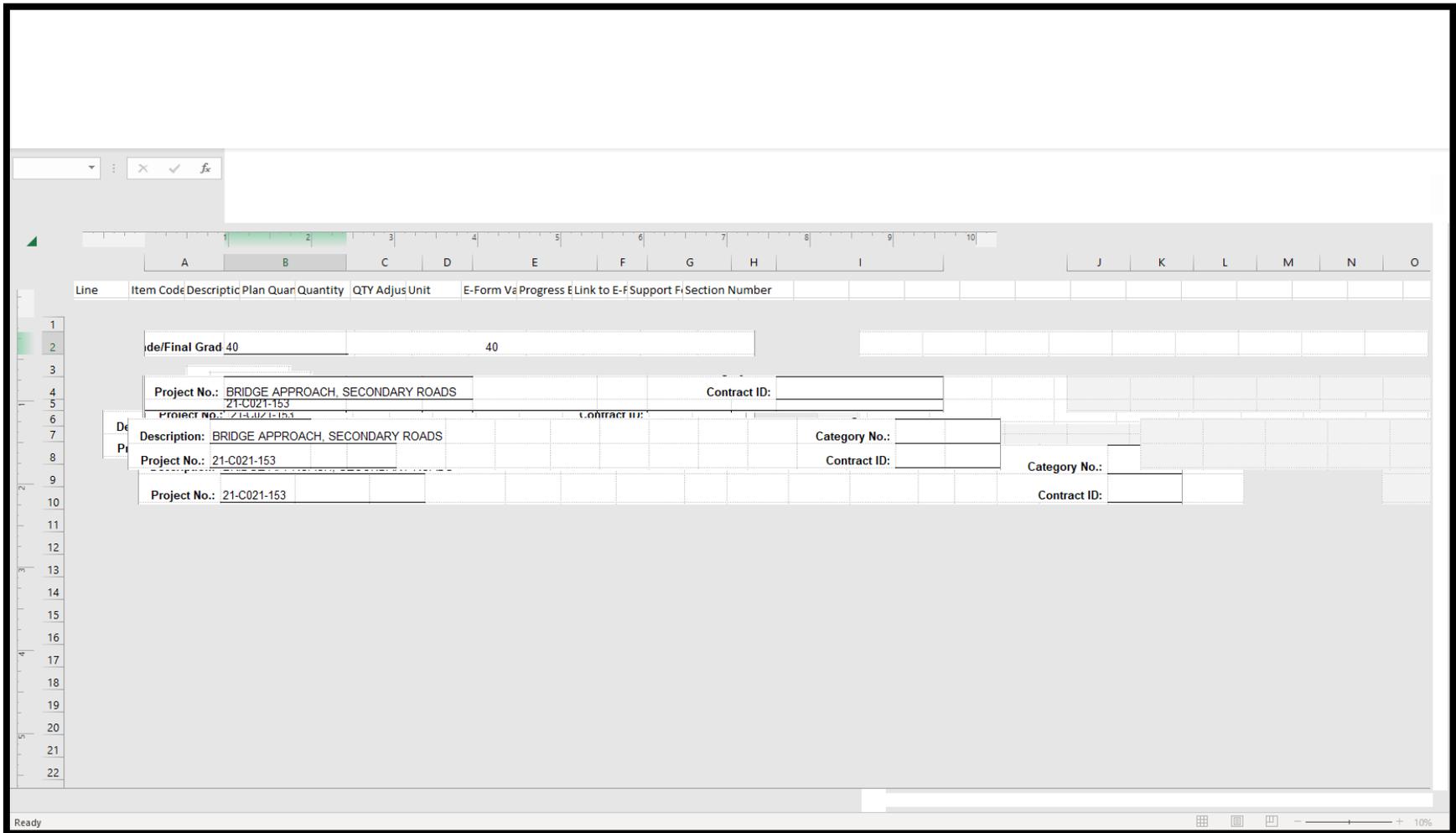
Clicking on the “Appia” button will cause a pop-up box to appear saying, “Please enter the project number:”. Because the workbook will contain items from all tied projects in a contract, enter the Contract ID for your contract. (This is the name of the project in Appia.) Then click “Ok”.



A Windows Explorer box will open. Navigate to the location where you saved the downloaded Appia file. Select the file, and then click “Open”.



The EZ Forms Workbook builder will start to run. You may see some blinking cells and partial screens while the macros run and create the workbook. This is OK and normal.



When the macros are done running and the workbook has been assembled, the screen will stop changing, and you will be brought to the Table of Contents page where all the items are listed.

Line	Item Code	Description	Plan Quant	Quant	QTY Adjustm	Unit	E-Form Val	Progress	E-Form	Link to E-Form	Support Forms
10	2110-3825010	GRANULAR MATERIAL	760			TON	0	0.00%		Link to Line 10 - E001	Line 10 - E110
20	2121-7425020	GRANULAR SHOULDERS, TYPE B	9550			TON	0	0.00%		Link to Line 20 - E007	
30	2214-5145150	PAVEMENT SCARIFICATION	74827			SY	0	0.00%		Link to Line 30 - E003	
40	2301-0690220	BRIDGE APPROACH, SECONDARY ROADS	97.8			SY	0	0.00%		Link to Line 40 - E023	Line 40 - E109, Line 40 - E110, Line 40 - E111
50	2301-1032090	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT	2813			SY	0	0.00%		Link to Line 50 - E023	Line 50 - E109, Line 50 - E110, Line 50 - E111
60	2301-9091000	RUMBLE STRIP PANEL (PCC SURFACE)	9			EACH	0	0.00%		Link to Line 60 - E039	
70	2310-5151040	PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY	12491			CY	0	0.00%		Link to Line 70 - E001	Line 70 - E115
80	2310-5151045	PORTLAND CEMENT CONCRETE OVERLAY, PLACEMENT ONLY	74947			SY	0	0.00%		Link to Line 80 - E003	Line 80 - E109
90	2315-8275055	SURFACING, DRIVEWAY	1140			TON	0	0.00%		Link to Line 90 - E001	
100	2316-0000110	PAYMENT ADJUSTMENT INCENTIVE/DISINCENTIVE FOR PCC PAVEMENT SMOOTHN	58320			EACH	0	0.00%		Link to Line 100 - E001	
110	2505-4008120	REMOVAL OF STEEL BEAM GUARDRAIL	260			LF	0	0.00%		Link to Line 110 - E039	
120	2505-4008410	STEEL BEAM GUARDRAIL BARRIER TRANSITION SECTION, BA-201	4			EACH	0	0.00%		Link to Line 120 - E039	
130	2505-4021010	STEEL BEAM GUARDRAIL END ANCHOR, BOLTED	4			EACH	0	0.00%		Link to Line 130 - E039	
140	2505-4021720	STEEL BEAM GUARDRAIL TANGENT END TERMINAL, BA-205	4			EACH	0	0.00%		Link to Line 140 - E039	
150	2510-6745850	REMOVAL OF PAVEMENT	2813			SY	0	0.00%		Link to Line 150 - E003	
160	2526-8285000	CONSTRUCTION SURVEY	1			LS	0.00	0.00%		Link to Line 160 - E005	
170	2527-9263109	PAINTED PAVEMENT MARKING, WATERBORNE OR SOLVENT-BASED	851.07			STA	0	0.00%		Link to Line 170 - E026	
180	2528-2518000	SAFETY CLOSURE	16			EACH	0	0.00%		Link to Line 180 - E039	
190	2528-8445110	TRAFFIC CONTROL	1			LS	0.00	0.00%		Link to Line 190 - E005	Line 190 - E126
200	2533-4980005	MOBILIZATION	1			LS	\$0.00	0.00%		Link to Line 200 - E030	
210	2555-0000010	DELIVER AND STOCKPILE SALVAGED MATERIALS	1			LS	0.00	0.00%		Link to Line 210 - E005	
8001	2217-1000000	RUBBLIZED PAV'T	160			SY	0	0.00%		Link to Line 8001 - E003	
8010	2107-3825025	GRANULAR MATERIAL FOR BLANKET AND SUBDRAIN	0			CY	0	#DIV/0!		Link to Line 8010 - E004	
220	2110-3825010	GRANULAR MATERIAL	319			TON	0	0.00%		Link to Line 220 - E001	Line 220 - E110
230	2121-7425020	GRANULAR SHOULDERS, TYPE B	6330			TON	0	0.00%		Link to Line 230 - E007	
240	2214-5145150	PAVEMENT SCARIFICATION	50893			SY	0	0.00%		Link to Line 240 - E003	
250	2301-1032090	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT	1397			SY	0	0.00%		Link to Line 250 - E023	Line 250 - E109, Line 250 - E110, Line 250 - E111
260	2301-9091000	RUMBLE STRIP PANEL (PCC SURFACE)	4			EACH	0	0.00%		Link to Line 260 - E039	
270	2310-5151040	PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY	8482			CY	0	0.00%		Link to Line 270 - E001	Line 270 - E115
280	2310-5151045	PORTLAND CEMENT CONCRETE OVERLAY, PLACEMENT ONLY	50893			SY	0	0.00%		Link to Line 280 - E003	Line 280 - E109

The assembled EZ Forms workbook for your project automatically saves to the location where the Appia file was saved. It will have the name “Project [Project Number]” where [Project Number] is the contract ID you entered in a previous step.

You are now ready to use the EZ Forms workbook in place of the standard E-Sheets.

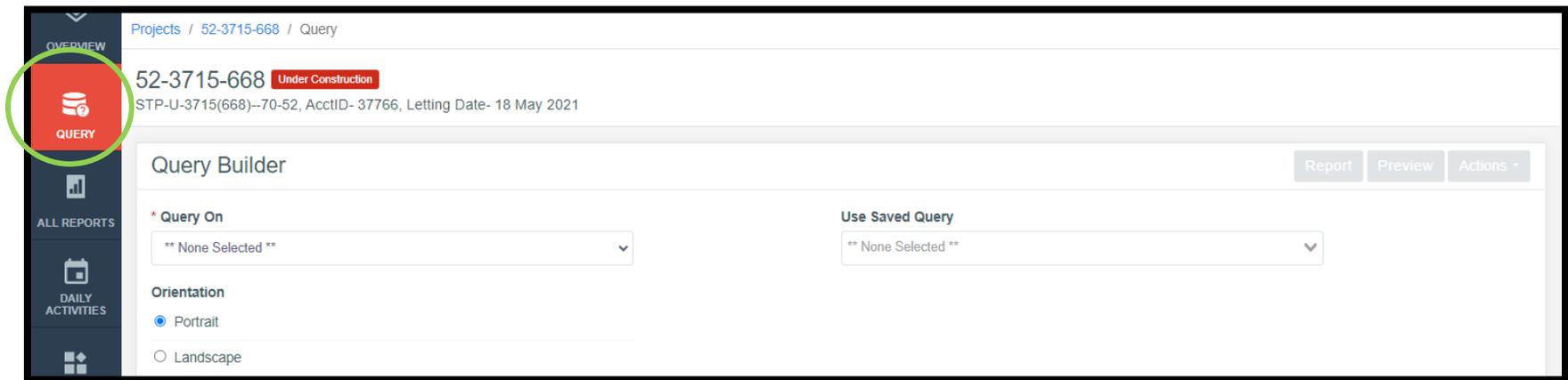
Contact your [Local Systems Regional Field Technician](#) with questions about the workbook.

B. Materials 101 EZ Form

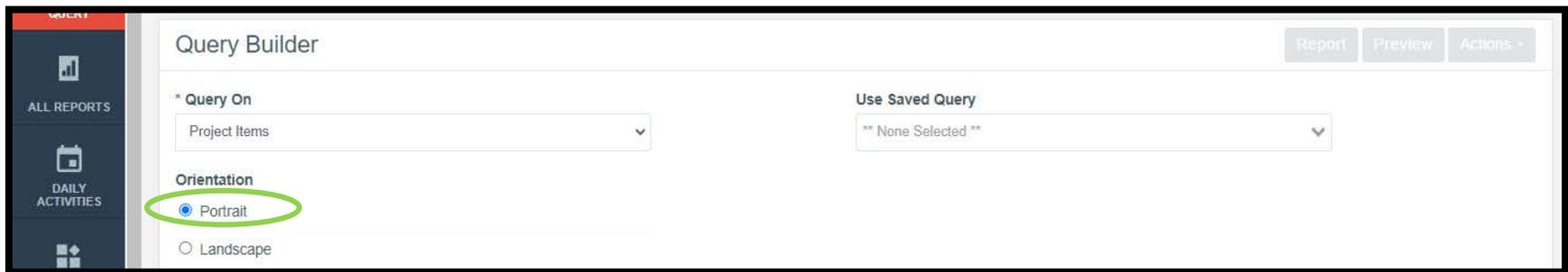
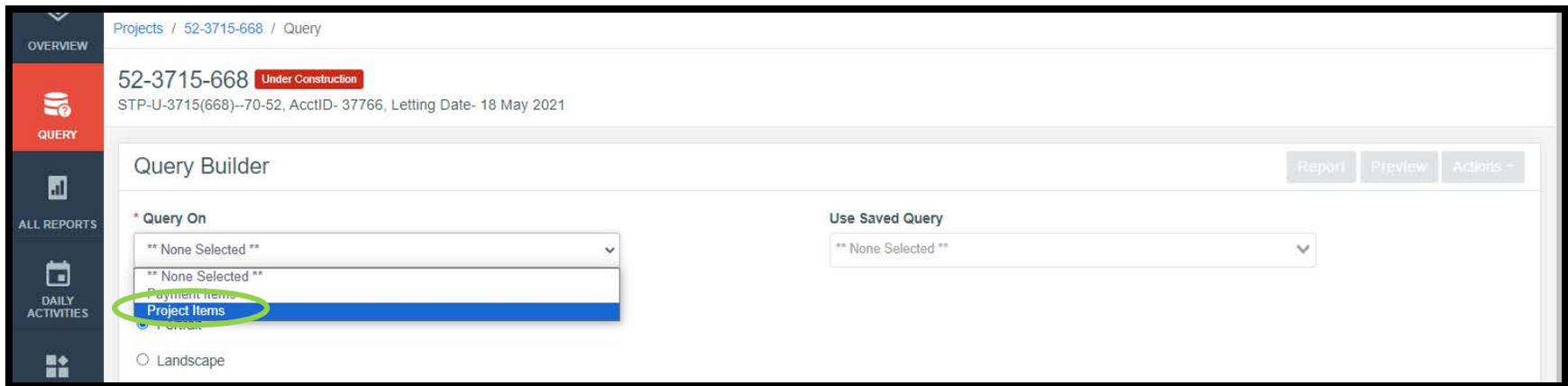
The Materials 101 EZ Form is a semi-automated version of the Materials 101 form required for project audits. The Materials 101 EZ Form is not yet available online. However, a copy can be requested from the LPA's [Local Systems Regional Field Technician](#).

You can export a queried report from Appia that can be loaded into the Materials101 EZ Form. When loaded into the Materials101 EZ Form, the item description, units, and quantity paid will all populate automatically once the user enters the bid item's line number in the "Contract Item No" line in on the sheets.

To generate the report for the Materials101 EZ Form, click on Query on the left menu.

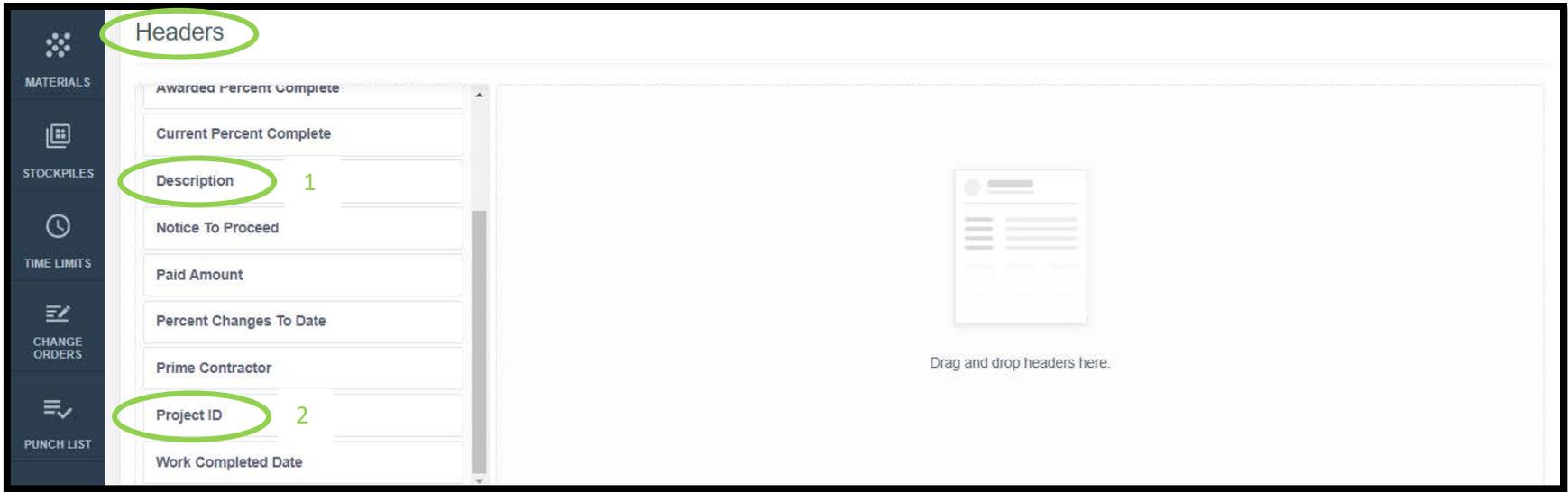


When building the report for the first time, in the "Query On" pull-down menu, select "Project Items". Leave the "Orientation" set to Portrait. (Once this report is built, you will be instructed on how to save it, and the report can be selected from the "Use Saved Query" pull-down menu in the future.)

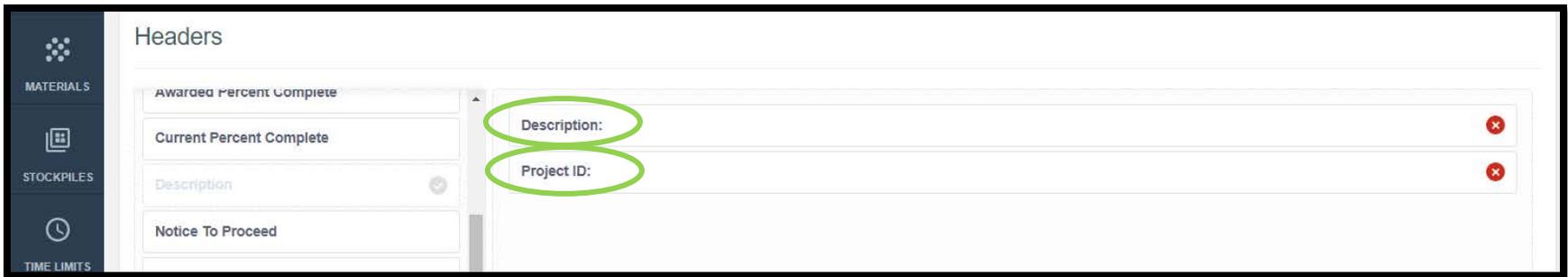


Once "Project Items" is selected from the "Query On" pull-down menu, two sections will appear on the lower part of the screen. These sections are "Headers" and "Body".

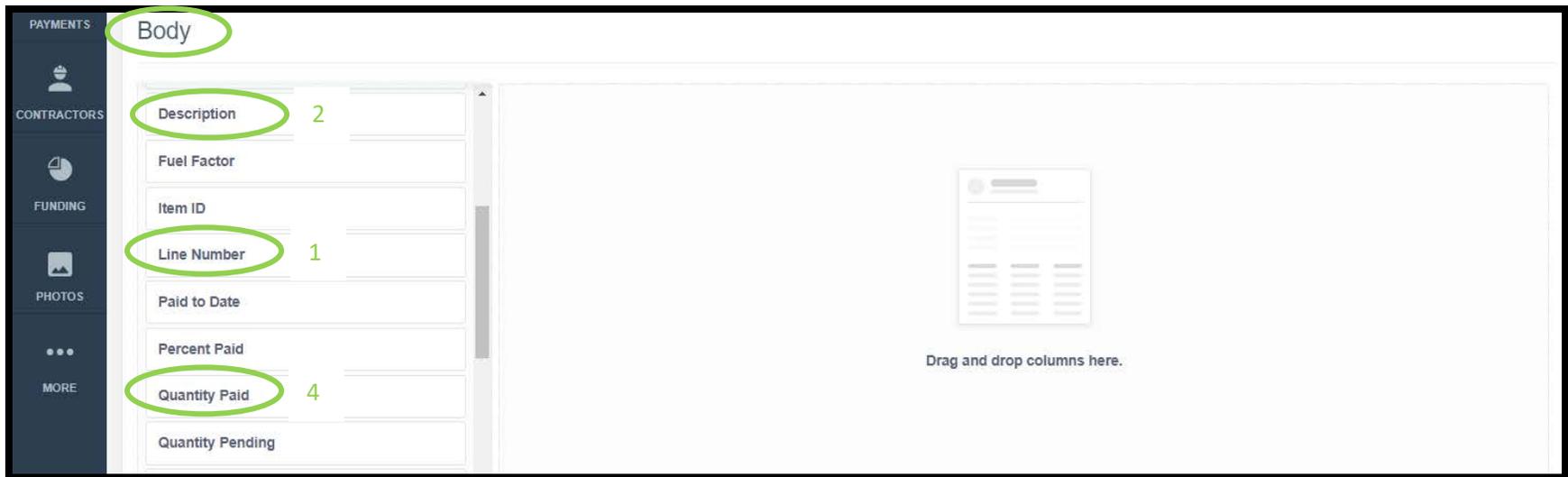
From the "Headers" section, in the order listed here, select "Description" and "Project ID". Do NOT select any additional Header options. If you do, the Materials101 EZ Form will not read the file correctly.



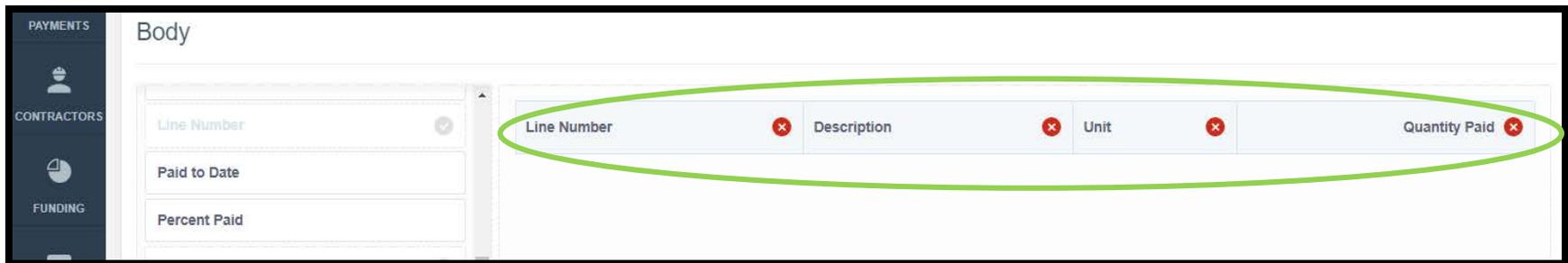
Each of the selections will then appear in the box to the right of the Header selection choices.



From the “Body” section, in the order listed here, select “Line Number”, “Description”, “Unit” and “Quantity Paid”.

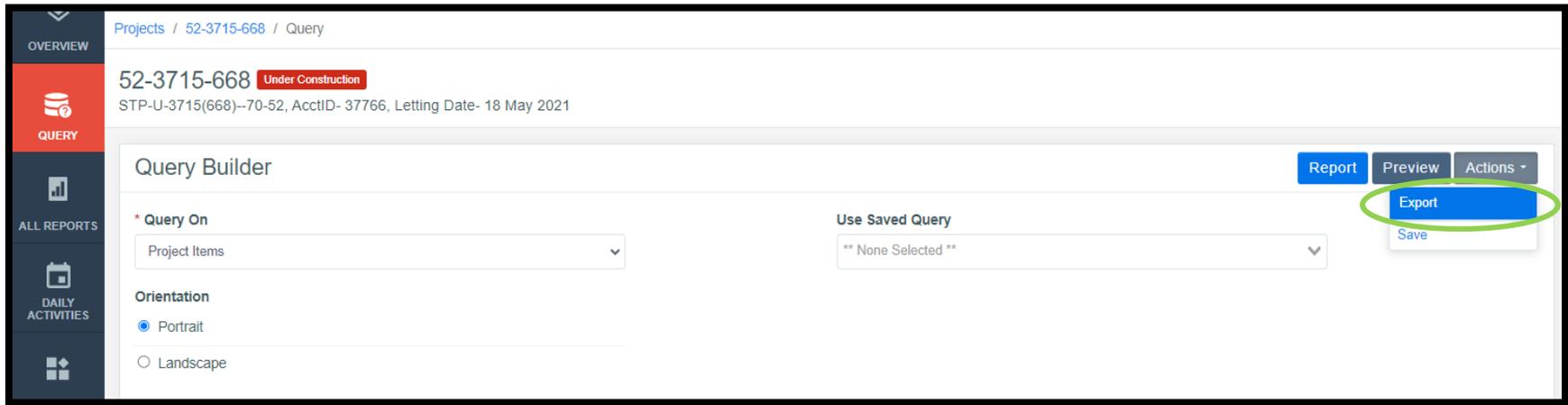


Each of the selections will then appear in the box to the right of the Body selection choices.

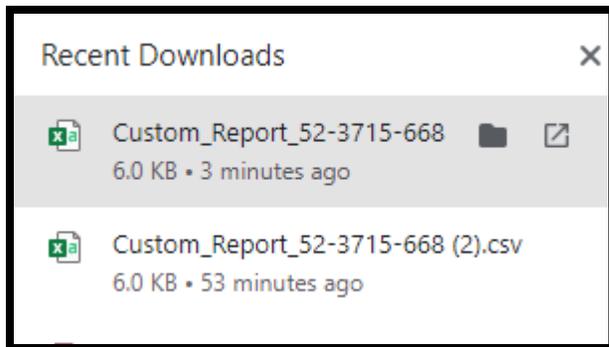


Note: The user can drag and drop the choices in the right windows to re-order them if necessary.

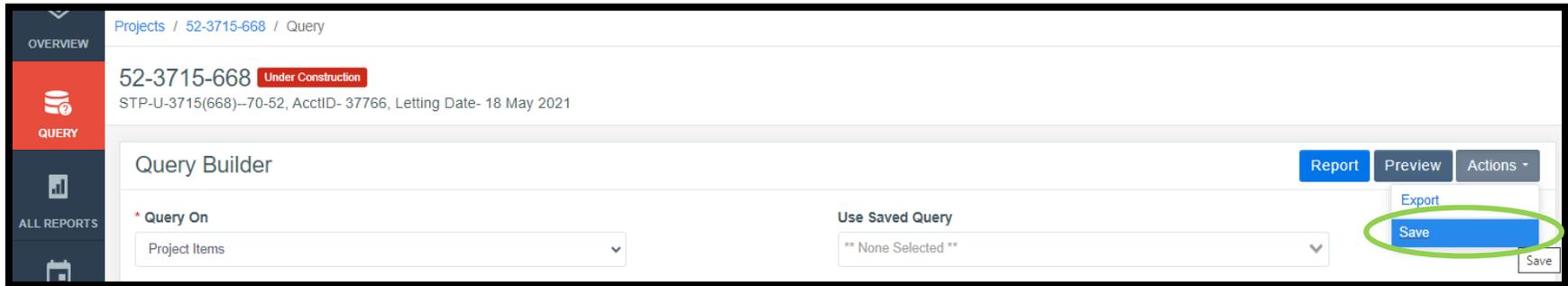
When the selections have been made, in the “Actions” pull-down in the top, right corner of the screen, select “Export”.



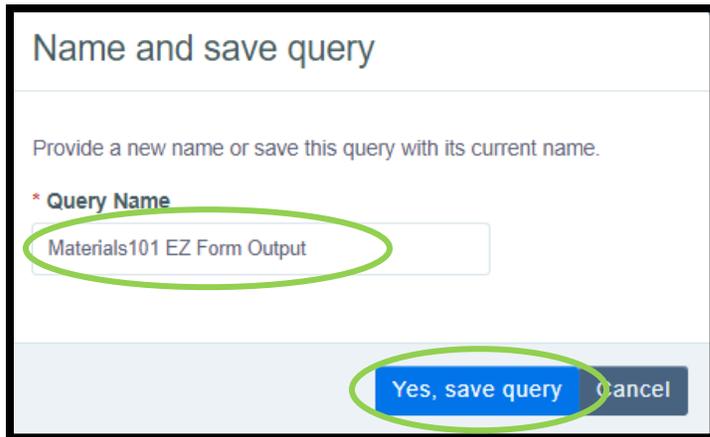
This will produce a .csv file that downloads in your browser. This is the file that will be selected for upload into the Materials101 EZ Form. Save this file to the desired location on your computer, but **do NOT rename this file or change the file extension**. If you rename the file or change the file extension, the Materials101 EZ Form will not work.



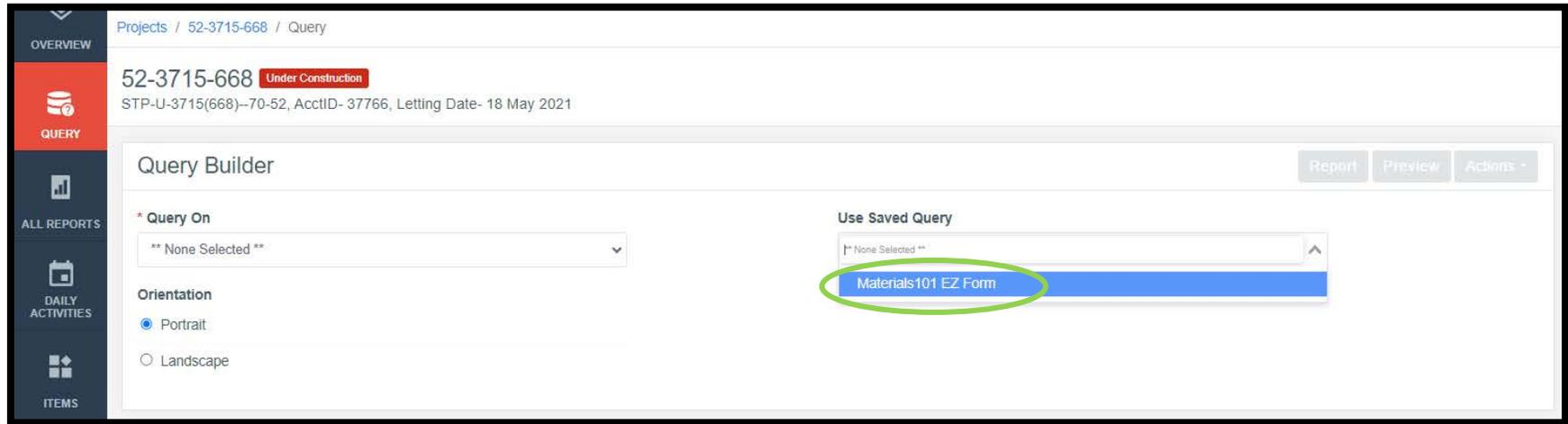
When you've completed the selections above, either before or after exporting the file, save the report by selecting "Save" from the "Actions" pull-down in the top, right corner.



A box will appear that allows you to create a name for the saved query. In the "Query Name" field, enter whatever name is most recognizable for you then click the blue "Yes, save query" button.



Once you've saved the report, you should be able to select it in the "Use Saved Query" pull-down menu the next time you want to run the report. Once a saved report is selected, the saved fields will automatically show, and the export can be run immediately.

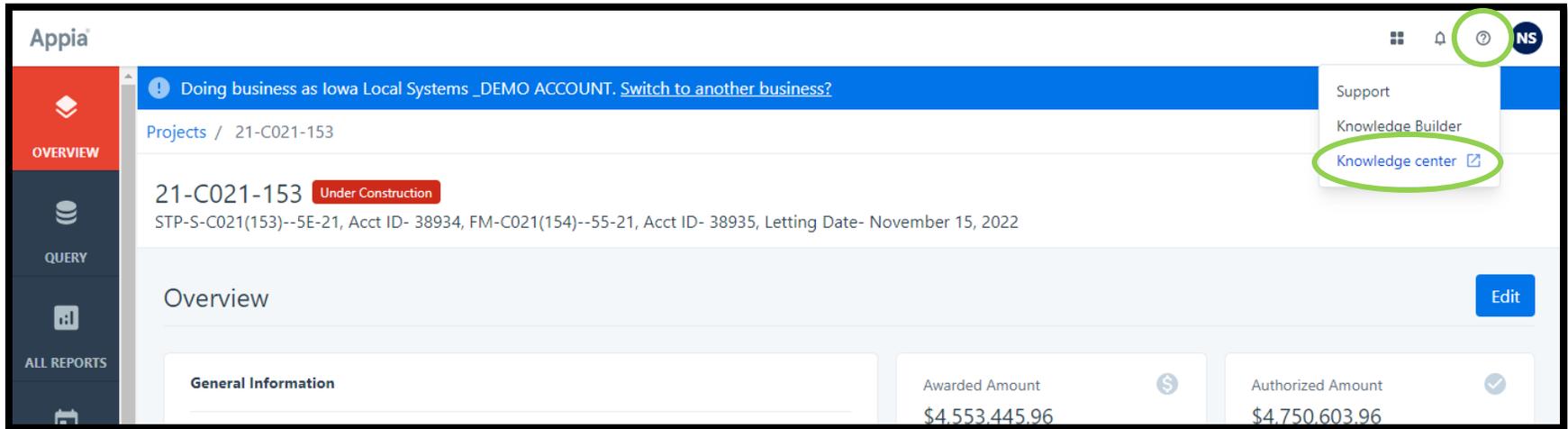


20 - Help Section & Local Systems

Contact Information for Questions and Assistance

“Help” Site

There is a very useful “Help” site provided by Infotech that can assist you in answering any questions. It is searchable and is indexed by topic. To access the “Help” icon in the upper, right corner of the screen just to the left of your initials. (It is a circle with a question mark (?) inside.) Then, select “Knowledge center” from the drop-down menu.



The screenshot displays the Appia software interface. In the top right corner, there is a navigation bar containing a grid icon, a bell icon, a help icon (a circle with a question mark), and initials 'NS'. The help icon is circled in green. A dropdown menu is open from the help icon, listing three options: 'Support', 'Knowledge Builder', and 'Knowledge center'. The 'Knowledge center' option is also circled in green. The main content area shows a project overview for '21-C021-153' with a status of 'Under Construction'. Below this, there is an 'Overview' section with a table of financial data.

General Information	Awarded Amount	Authorized Amount
	\$4,553,445.96	\$4,750,603.96

The “Help” site opens in a new browser tab and is shown here.

The screenshot shows the Appia® Knowledge Center interface. At the top left is the 'infotech.' logo followed by 'Knowledge Center'. On the top right, there is a search bar with a magnifying glass icon and the text 'Search', and a 'Contact Support' link. Below the header, the breadcrumb 'Infotech > Appia®' is visible. A left-hand navigation menu lists several categories: 'APPIA®', 'Appia® | Business Setup', 'Appia® | Reference Data', 'Appia® | Projects in New Phase', 'Appia® | Projects Under Construction', 'Appia® | Project Closeout', 'Appia® | Generating Reports and Sharing Data', 'Appia® | Integrations', and 'Training Materials'. The main content area features the 'Appia®' logo in a large blue font, followed by a descriptive paragraph: 'Municipalities and engineering firms nationwide use Appia to streamline construction administration and inspection on federal, state, and locally-funded infrastructure projects. Appia's mix of mobile tools, integrations, and free read-only accounts supports collaboration and compliance on every project.' Below this is a sub-section header 'Appia® | Business Setup' in blue. Underneath are three links: 'Appia® | User roles and permissions' with a sub-link 'See also: Appia® | Licenses | Add, renew, or assign licenses Intro to Appia® user roles What is a user role...', 'Appia® | Order licenses as a first-time user' with a sub-link 'See also: Appia® | Licenses | Add, renew, and manage licenses Appia® | User roles and permissions Are you and yo...', and 'Appia® | Add, renew, and assign licenses'.

Local Systems Contact Information

Contact Niki Stinn and/or Derek Peck in the [Iowa DOT Local Systems Bureau](#) as shown below with any questions.

Project set-up & program usage technical assistance

Niki Stinn

Title: Secondary Roads Engineer

Email: Niki.Stinn@iowadot.us

Phone: 515-239-1064

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

Hours: 8:30am-4:30pm (Hours may vary)

Account set-up and management assistance

Derek Peck

Title: e-Construction Administrator

Email: Derek.Peck@iowadot.us

Phone: 515-239-1391

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

Hours: 7:30am-4:30pm (Hours may vary)