PSA Online Application User Guide

General Contractors (GC)

V2 2024

LORETTA WALDEN

FPC Custom Application Specialist
FACILITIES PLANNING & CONSTRUCTION
4860 Ruffner Street, San Diego, CA 92111
Mobile: 619-884-4500 & email: lwalden@sandi.net

Contents

User Guide Updates

| Date	Updated by	Explanation
12/01/2022	Loretta Walden	GC Dashboard, complete Pre-Job Form, Pre-Job Mtg. Review & Support
01/12/2023	Loretta Walden	Adding detail of Ongoing Projects & App used for New Projects
03/24/2023	Loretta Walden	Dashboard See all forms and Action Icons updated (Save, Edit & Delete)
08/16/2023	Loretta Walden	1.2 (2) Step Verification Steps
09/21/2023	Loretta Walden	1.3 Dashboard update with Letter of Assent (LOA) Electronic Signature for Subcontractor & Tier Subcontractor & Pre-Job Meeting List
10/4/2024	Loretta Walden	2.0 New Dashboard & Permissions for all users from same company have edit form capability

Release Summary Main Features:

1. **All users for a given contractor will be able to modify a Pre-Job Conference Form**

2. **Updated Dashboard with new options, including Tasks, a Calendar of upcoming activities, and access to all PSA project data via the Project Center**

3. **Calendar of Scheduled Activities for PSA projects**

4. **Project Center to Access more Project Data**

LINK TO PRODUCTION SITE: https://psa.sandi.net

1. INVITATION TO CREATE ACCOUNT

- Browser to use Application – **Chrome or Edge**
- One-time account set-up will be required by User and not required with each invitation to a new project
- Email invitation title will have "CREATE ACCOUNT"
- Use Temporary password to login & assign password
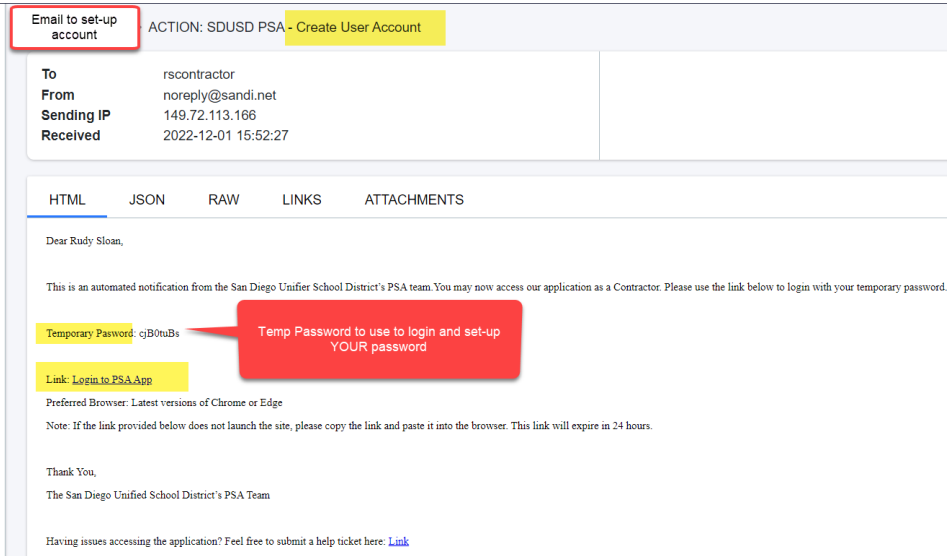
- **Enter Temp password & User Password**
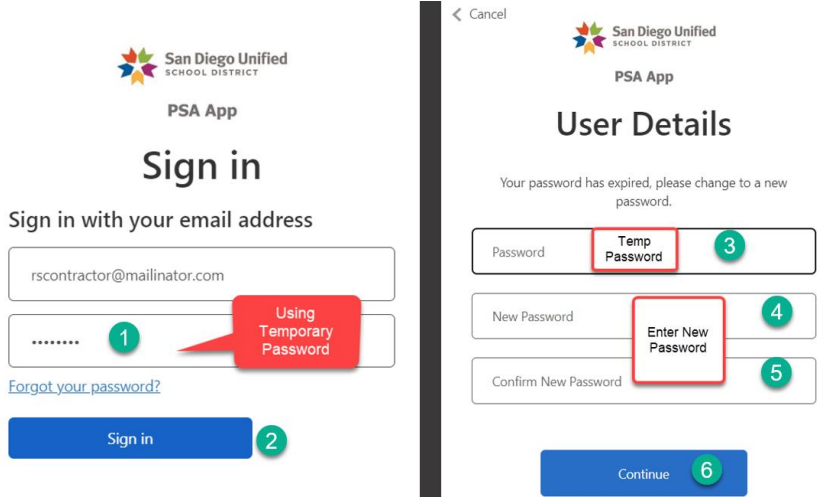
- **User will be sent to Contractor Dashboard**

2. INVITATION TO PROJECT

- Email will be sent to User in system when assigned to a project
- Click on **Link to open to Pre-Job Conference and get started**

3. **LOGIN –Production web address: https://psa.sandi.net/**

Sign in Screen – Email & Password. 2-Step Verification
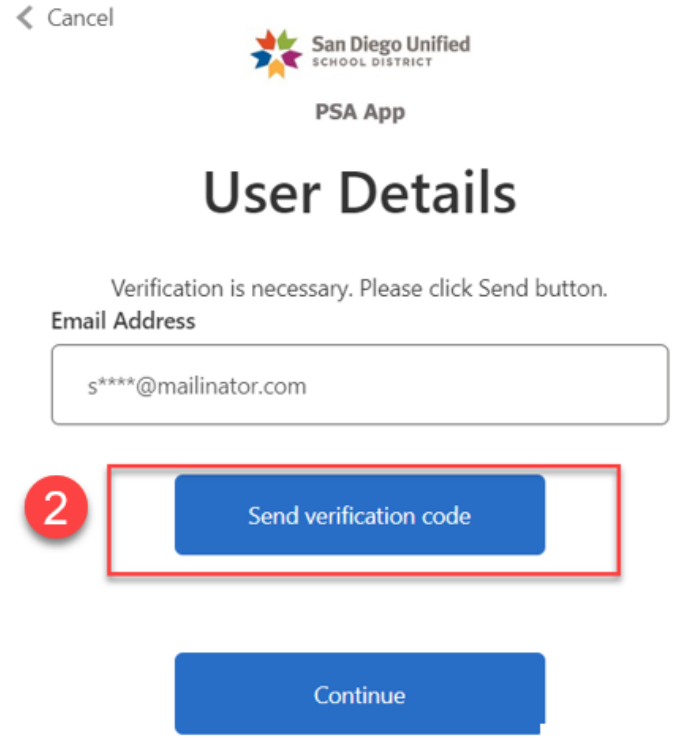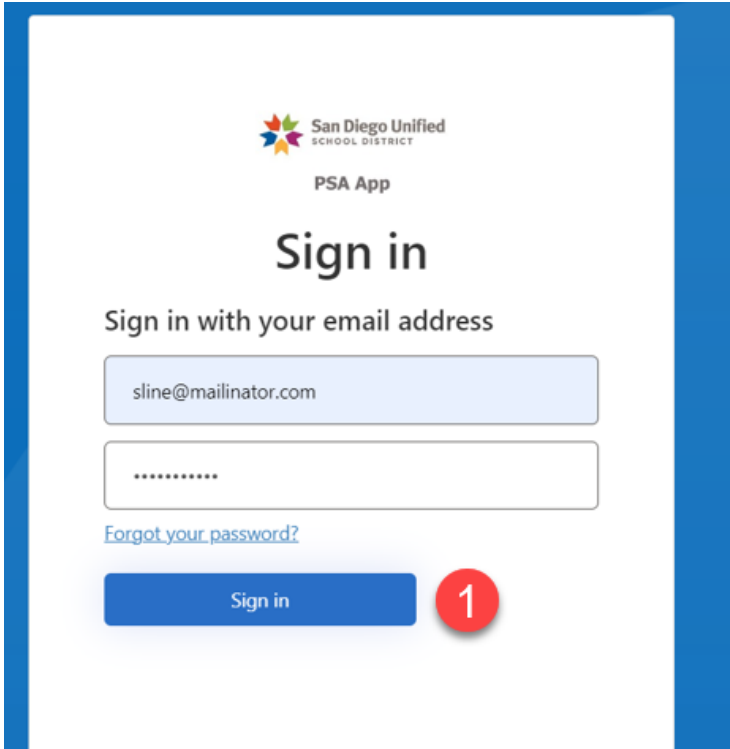
Go to Email to retrieve Verification Code

San Diego Unified
SCHOOL DISTRICT
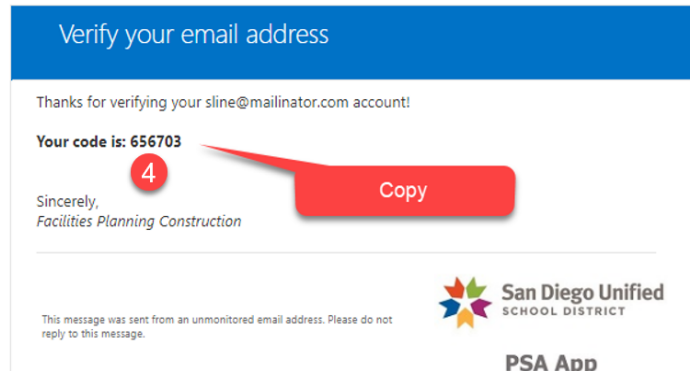
PSA App

User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

s****@mailinator.com

Verification code

Verification code | Enter Code

Verify code | Send new code

Continue

San Diego Unified
SCHOOL DISTRICT

PSA App

User Details

E-mail address verified. You can now continue.

Email Address

s****@mailinator.com

Continue

If you forgot password, use link below to reset & resend Temp Password

San Diego Unified
SCHOOL DISTRICT

PSA App

Sign in

Sign in with your email address

ramona@mailinator.com

....

Forgot your password?

Sign in

4. LETTER OF ASSENT (LOA) DOCUSIGN ELETRONIC SIGNATURE (Sign LOA & View LOA)
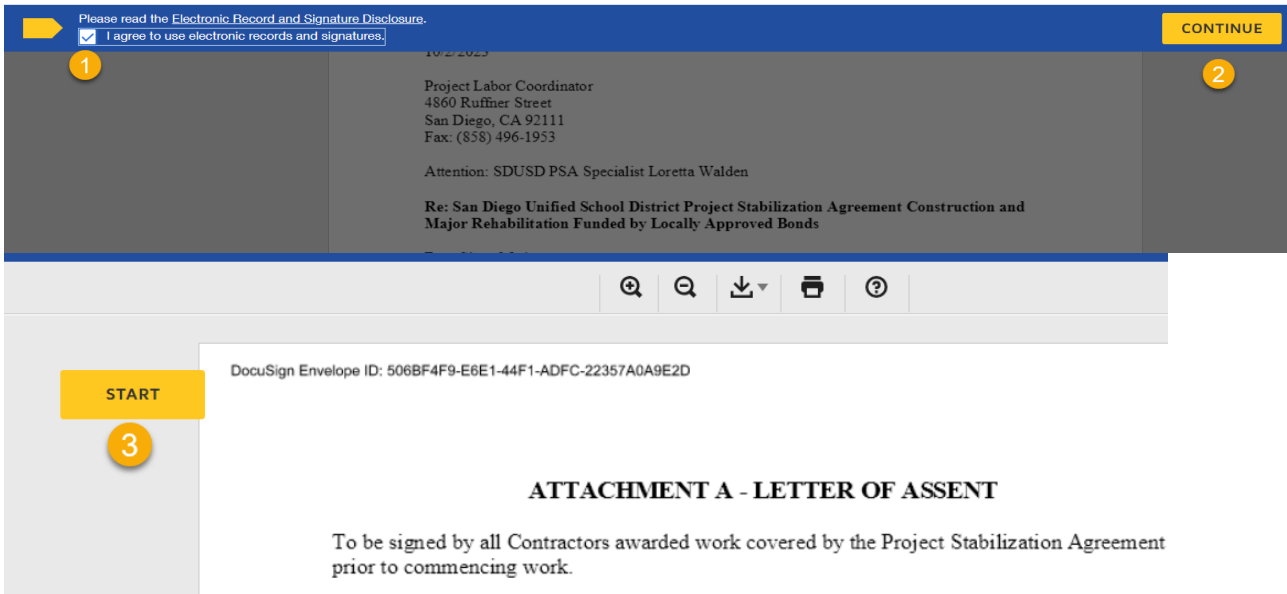
a) LOA Email sent to LOA Signer from Application

From	Subject	Letter of Assent Email sent Signature
☐ San Diego Unified School Di...	Project Stabilization Agreement Letter of Assent for Your eSignature	
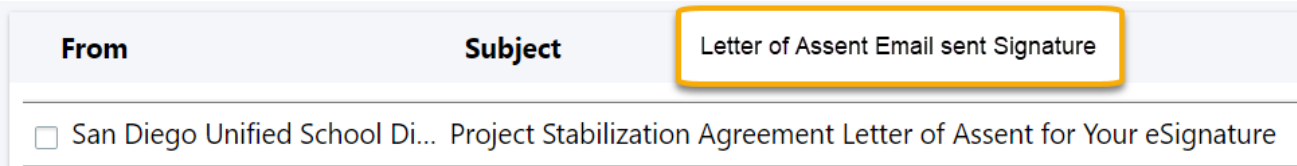
b) Open email & select "Review Document"

KS   SMTP_LOG   ATTACHMENTS

Open Email

San Diego Unified
SCHOOL DISTRICT

San Diego Unified School District, Facilities Planning & Construction sent you a
document to review and sign.

REVIEW DOCUMENT

San Diego Unified School District, Facilities Planning & Construction
smahar@sandi.net

You are receiving this notification because your company has been selected for a construction

c) Start process of electronic signature

- Step 1 Check Mark, Step 2 Continue, Step 3 Start, Step 4 Sign, Step 5 Adopt & Sign, Step 6 Finish, Step 7 Download/Print & Step 8 No Thanks

Please Review & Act on These Documents

San Diego Unified School District, Facilities Planning & Construction
Gafcon Inc

You are receiving this notification because your company has been selected for a construction project for the San Diego Unified
School District governed by the Project Stabilization Agreement (PSA). Per Section 2.4(b) of the PSA, your company is required
to sign and submit a Letter of Assent (LOA) before beginning your work on that project. You have been identified as an
View More

Please read the Electronic Record and Signature Disclosure.
☑ I agree to use electronic records and signatures.

CONTINUE

10/2/2023

Project Labor Coordinator
4860 Ruffner Street
San Diego, CA 92111
Fax: (858) 496-1953

Attention: SDUSD PSA Specialist Loretta Walden

Re: San Diego Unified School District Project Stabilization Agreement Construction and
Major Rehabilitation Funded by Locally Approved Bonds

DocuSign Envelope ID: 506BF4F9-E6E1-44F1-ADFC-22357A0A9E2D

START

ATTACHMENT A - LETTER OF ASSENT

To be signed by all Contractors awarded work covered by the Project Stabilization Agreement
prior to commencing work.

SIGN

Sincerely,
CSM PLUMBING INC

Sign ↓ ④

By:

PREVIEW

DocuSigned by:
CSM LOA UserTest
974E7B197124483...

DS
CW

By selecting Adopt and Sign, I agree that the signature and initials will b
my agent) use them on documents, including legally binding contracts.

⑤

ADOPT AND SIGN   CANCEL

FINISH

⑥

This is to confirm CSM PLUMBING INC agrees to be party to and bound by the San Diego
Unified School District Project Stabilization Agreement effective July 28, 2009, as such
Agreement, may from time to time be amended by the negotiating parties or interpreted pursuant
Assent prior to their commencement of work.

Sincerely,
CS. Required - Signature Applied

DocuSigned by:
CSM LOA UserTest
974E7B197124483...

By:
Name: CSM LOA UserTest
CSMLOA Test User

[Copies of this Letter must be submitted to the Project Labor Coordinator and to the
Council consistent with Article II, Section 2.4(b)]

FINISH

⑥

This is to confirm CSM PLUMBING INC agrees to be party to and bound by the San Diego
Unified School District Project Stabilization Agreement effective July 28, 2009, as such
Agreement, may from time to time be amended by the negotiating parties or interpreted pursuant
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CSM LOA UserTest
974E7B197124483...

By:
Name: CSM LOA UserTest
CSMLOA Test User

[Copies of this Letter must be submitted to the Project Labor Coordinator and to the
Council consistent with Article II, Section 2.4(b)]

Save a Copy of Your Document

Download or Print

⑦

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email
csmloa@mailinator.com

Password

Confirm Password

Country/Region
-- select --

By clicking the 'SUBMIT' button, you agree to the
Terms & Conditions and Privacy Policy.

SUBMIT   NO THANKS ⑧

Electronically sign any document.

Get signatures from others.

Sign on the go with DocuSign Mobile!

5. CONTRACTOR DASHBOARD

Dashboard Home – Tasks, Calendar Upcoming Scheduled Activities & Project Center

IMPORTANT – Update to Permissions, all users from same company have access to update form

TASKS

(Assigned Pre-Job Forms Waiting for Submission, Assigned LOAs Waiting Submission not applicable for GCs submitted @ bid time & Pre-job forms for Subs & Tiered Subs Waiting for Submission)

UPCOMING SCHEDULED ACTIVITIES (Job Walks, Board Awards, Bid Opening and Pre-Job Conference Meetings) To view all Pre-Job meetings, click on *'purple' Pre-job Conference). When selecting calendar activity, opens to Project Details

PROJECT CENTER ("My PSA Projects"-assigned to Contractor only or All Projects to view all in Application)

1. Open project, click on Bid Number
2. Project Details will be displayed and access to Pre-Job Mtgs., Project List of Contractors & List Assignments

PROJECT CENTER – use to OPEN project, Bid Number & opens Project Details. By Default "My PSA Projects" are filtered to only project(s) Contractor are assigned. "All Projects" displays all in application

PROJECT DETAILS (Use left Navigation to move from Details, Pre-Job Meeting, List of Contractors and List of Assignments)

- **Pre-Award Activity, Job Walks and Contractor Information**

- **Contract Information, Contract Amount & DIR Project Number**

Contract Information

Contract Number *
CS092024-01-LW

Contract Title *
Euclid ES WSM LW

Contract Estimated Start Date*
09/02/2024

Contract Estimated End Date
10/31/2026

Contract Amount
$5,000,000.00

DIR Project Number
4553443

- **Project Attachments (Uploaded by Specialist & when meeting is Closed, Meeting Minutes will be available)**

Project Attachments

CONTRACTOR	FORM TYPE	TITLE	FILE NAME	UPLOADED DATE	UPLOADED BY	ACTIONS
		Bid Advertisement	Advertisement for Bids - SAMPLE.pdf	10/10/2024 04:55 PM	Loretta Walden-Admin	
	PreJobConferenceMeeting	PreJobConferenceMeeting_10/10/2024_Euclid ES WSM LW	PreJobConferenceMeeting_79_closed.pdf	10/10/2024 05:31 PM	Loretta Walden-Admin	

PROJECT PRE-JOB MEETINGS (Use left Navigation)

- **Access Meeting Link for General Registration for Pre-job Conf. Mtg.**

- **Agenda (Displays Subcontractors with published forms "Yes" to be reviewed in Pre-Job Conf. Meeting)**

- **After meeting is CLOSED– access Meeting Recording & Meeting Minutes**

PROJECT LIST OF CONTRACTORS-PLOC use left Navigation or use from Project Details

PLOC – Contractor Name, Contractor Type (General, Subcontractor or Tiered), Active, Letter of Assent & Pre-Job Form status)

- **LOA – "View" Executed and no Icon Pending Pre-Job Form shows Status & "Complete" to start form**

Updated to Permissions all Users from the same company have access to edit form. If form is being edited by another user, form will display User Name.

PROJECT LIST OF ASSIGNMENTS

- **List of all Unions assigned from each Subcontractor or Tier Contractor assigned per Subcontractor**

Dashboard PRE-JOB MEETINGS

To go back to Project Center, select "Home"

6. PRE-JOB CONFERENCE FORM STEPS

From Dashboard complete form

a. **START WITH TASKS** (Assigned Pre-Job forms Waiting for Submission, Assigned LOAs Waiting for Submission and Pre-Job Forms for Tiered Subs Waiting for Submission)

Step 1 - Project Information is review only for GC, no action. If information is not correct, contact your assigned Specialist, if not **CLICK NEXT**

Step 2 – Contract Summary

- Enter **Estimated Construction Start & End Date –** use calendar lookup or enter month/day/year or type date in MM/DD/YYYY format
- **Contract Summary** – enter scope of work & click NEXT. *NOTE:* add as much DETAIL to eliminate questions in mtg.

Step 3 – Jobsite Information

- **School Name and Address –** drop down will only display the project assigned by Specialist, select location
- **Phone & Fax Number**

- **Jobsite Information** – Number of Facilities: First Aid, Sanitary and Drinking Water
    - Comments to add other locations or options for Facilities
- **Jobsite Parking** – description of parking location & restrictions
- **Hospital information** & NEXT

Step 4 – Self-Performing

- Selecting No will move you to next Step 5 Jobsite Scheduling/Administration
- Yes Performing– see below will require Crew & Union Assignments

Step 5 – Yes Performing and Step 6 will be added Crews & Assignments

- **Jobsite Scheduling Information** – Number of shifts: Number & Description
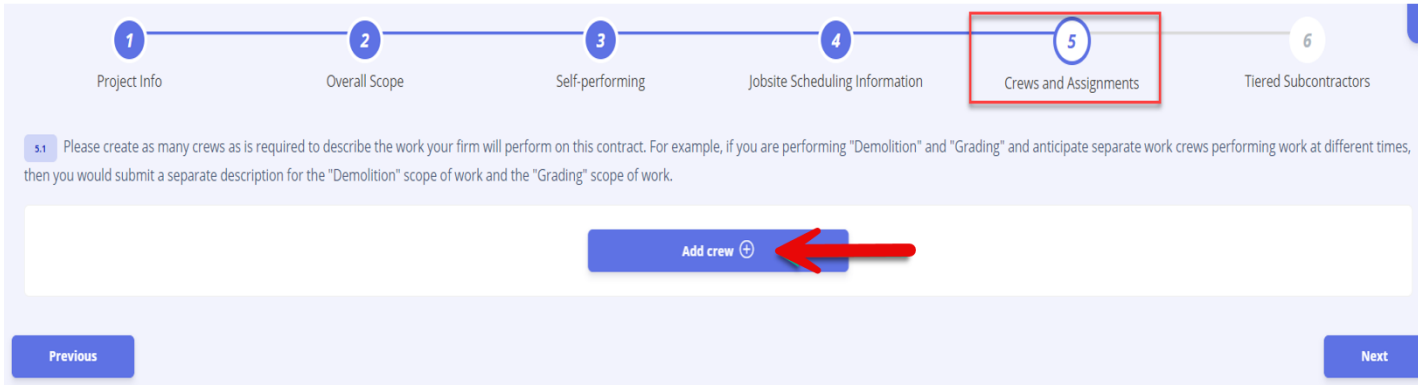- **Pay Day and Pay Period End Day** – use drop down to select days

- **Jobsite Administration** – Project Manager is required & checked by default
  - First, Last, Email & Phone Number
- **"Add Other Jobsite Administration"** names as necessary & NEXT

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Step 6 -Crews and Assignments (Crew, Scope of Work, Equipment)

- **Click Add Crew+**

- Crew name, Scope of work and Equipment utilized & **MUST SAVE Crew prior to doing assignments.**
  - o **NOTE: Scope of work /Activities – ADD DETAIL & STEPS.** Detail will eliminate in meetings lots of questions for clarification. IMPORTANT!! – Crew has to be saved 1st before Assignments can be added
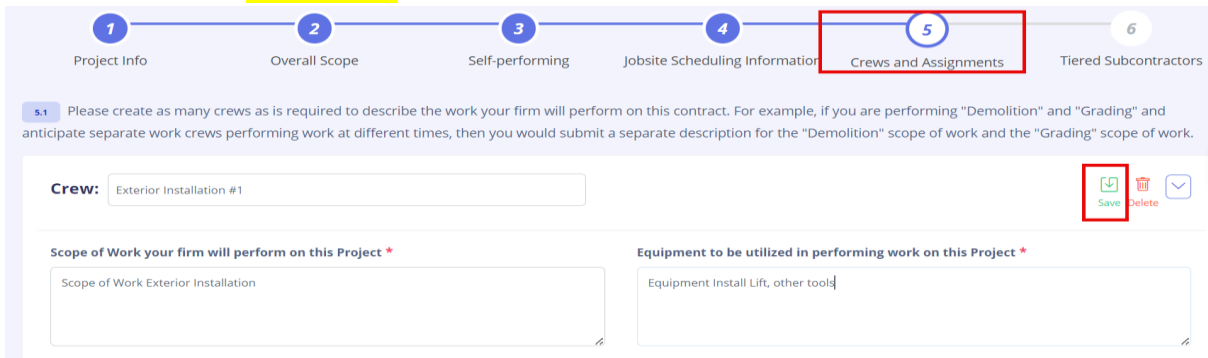
- **Add Assignments+**
 - o **Union – use drop down to select or type name for quick find. Some Unions have more than one work classification. Be sure to select the appropriate classification for this assignment**
  - o **Activities / Responsibilities**
  - o **Date – start & end**
  - o **Estimated Works Average & Peak & SAVE. Add another Crew or SUBMIT**
  - o **AS NEEDED- Add Assignment+ to additional to same crew OR "ADD CREW" if more crews to record & NEXT**
  - o *Sample DIR Classification(s) & Crew Member Activities/Responsibilities:*
    - Union DIR=Operating Engineers Local 12 | Activities=All equipment work, including rough grading and minor excavation
    - Union DIR= Laborers Local 89 | Activities=All equipment work, including rough grading and minor excavation
    - Union DIR= Painters Local 1399 | Activities= Application of anti-slip paint application to decks and stairs
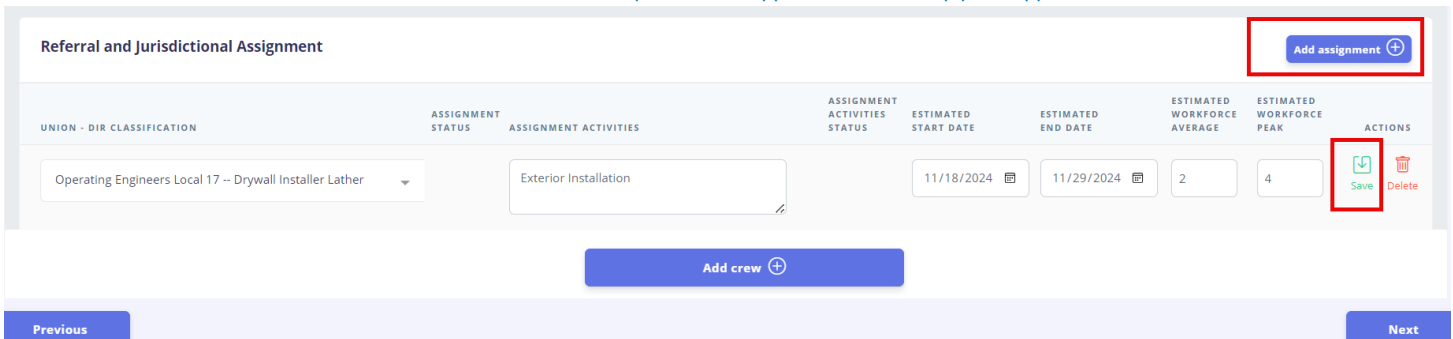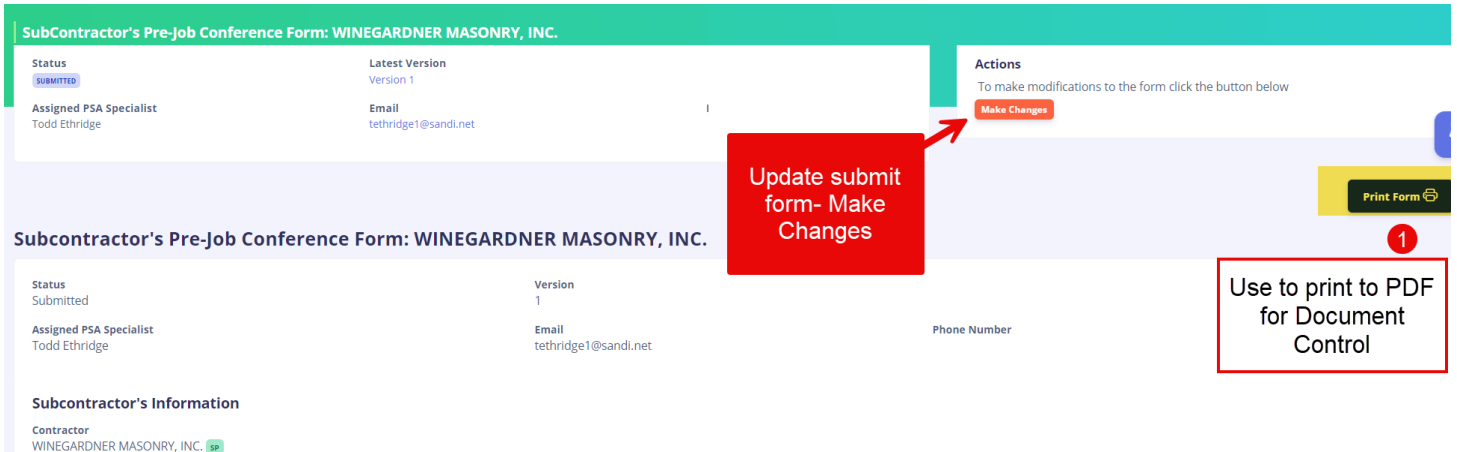
SUBMIT – Would like to submit form?

- **No go to previous**
- **OK to submit for Specialist Review & Publish**
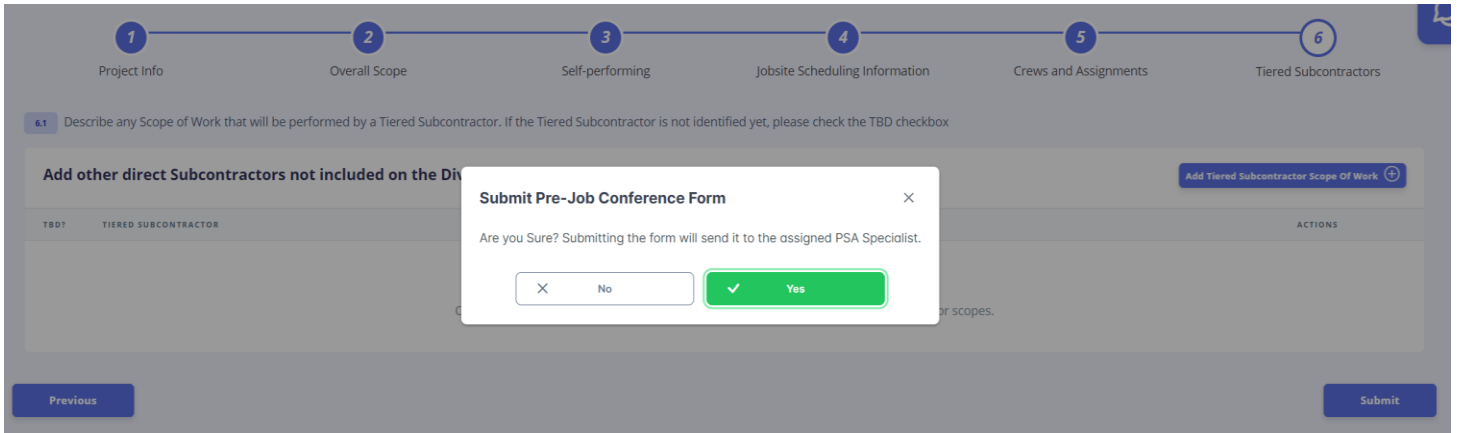
VIEW OF SUBMITTED FORM & PRINT FORM

- **Status in Upper Left Box – 1. Submitted for Specialist Review, 2. Published- Specialist Accepted & ready for Pre-Job Meeting & 3. Revise/Resubmit if Changes have to be made**
- **Print Form for "Subcontractor Company Record" & recommend sending to your GC (see next page)**

Print Form for General Contractor Document Control

Print View

7. MAKE CHANGES TO FORM

- **Select "Make Changes" from Actions section** *Note: the option to Make Changes will be available until the PSA Specialist has reviewed your form and promoted it to a Published status.*

- **Enter message to Specialist explain request for change to Pre-Job Form & select YES to send**

8. PRE-JOB CONFERENCE MEETING (PJCM)

- **How meeting is conducted:** Meeting will start with the Specialist introducing the meeting & housekeeping. The GC will then take the lead and present each Subcontractor and Tiered Subcontractor(s) review scope of work, equipment used, and work assignments.
    - i. If Subcontractor not in attendance, GC will present Pre-Job Form in meeting.
- **Pre-Job Conference Meeting** – a Teams invitation as Panelist & Speaker will be sent to you as GC – <mark>DO NOT FORWARD PANELIST INVITE TO YOUR SUBS</mark>
    - i. Outlook GENERAL LINK invite will be forwarded by your Specialist for you to SEND TO YOUR SUBS
- **Pre-Job Conference Meeting Agenda** – identifies Subs submitted & published to be reviewed with "Yes" next to Sub/Tier name

Subject: Agenda for mandatory SDUSD Project Stabilization Agreement (PSA) Pre-Job Meeting for CC25-0212-52

A Pre-Job Meeting **Installatation of relocaltable buildings Pre-job meetin** For **Contract Number: CC25-0212-52, Contract Title: INSTALLATION OF RELOCATABLE BUILDINGS AND PLAYGROUND EQUIPMENT AT 2 SITES** will be held on **10/09/2024 08:00 AM** The meeting will be conducted virtually, using Microsoft Teams. The General Contractor for this project is **CONAN CONSTRUCTION, INC** . Below is a summary of the contractors whose work assignments are expected to be covered in this meeting as well as some basic meeting procedures. A separate calendar invite with a link to register for this meeting will be distributed and invitees should use that link to indicate they plan to attend. If you have any questions about the PSA, contract or meeting procedures, please contact **Rey Pedregon** the PSA Specialist managing it on behalf of the San Diego Unified School District.

Meeting Notes: This is the First kick off meeting for Conan for this project

List of Contractors to be discussed:

Attending - Contractor Type - Contractor Name

· **Yes- GC -CONAN CONSTRUCTION, INC**

- No- Sub -ART LOCATING
- No- Sub -ASBURY STEEL, INC.
- No- Sub -CATS GENERAL ENGINEERING
- No- Sub -DRV MODULAR CONTRACTORS, INC.
- No- Sub -FENCING
- No- Sub -GOTHAM POURED RUBBER CORPORATION
- No- Sub -JOHNSON CONTROLS FIRE PROTECTION LP
- <mark>**Yes- Sub -RAP Engineering LLC**</mark>
- No- Sub -ROBERTSON INDUSTRIES, INC.
- No- Sub -ROBINSON ELECTRIC
- No- Sub -RUSSELL KEVIN PENE
- No- Sub -SB&O, INC
- No- Sub -Silver Creek Industries LLC
- No- Sub -SITE UTILITIES, PLUMBING, MECHANICAL
- No- Sub -SOUTHLAND ELECTRIC, INC.
- <mark>**Yes- Sub -STANDARD ELECTRONICS**</mark>
- <mark>**Yes- Sub -WORLD BRIDGE TECHNOLOGIES, INC.**</mark>

Yes or No Subs to be reviewed in Pre-Job Conf. Mtg.

Basic Information for PSA Pre-Job Meetings:

- All Pre-job meetings will be conducted using Microsoft Teams. No call-in number will be available. You can access the meeting by using the Teams app on your mobile device or via the web browser on your device.
- After registering, you will receive a link you will use to join the meeting at its scheduled time. Please do not share this meeting link as it connected to the information you entered when registering.
- If someone on your team did not receive the registration invite and would like to attend, you can feel free to share that registration link.
- Each meeting will be recorded and a copy of the recording will be available after the meeting ends.

- **Form review during meeting & status applied:**
  1. **Overall Scope**
  2. **Crew & scope of work performed**
  3. **Equipment Utilized**
  4. **Union**
  5. **Summary of Work**

  i. **Status will be applied depending on discussion & acceptance of Unions**
     1. Assignment Status- Final, Final Challenged Rejected
     2. Summary of Work – Accepted or Rejected

Pre-Job Conference Meeting   Close Meeting   Print 🖶

Meeting Details

Title	**Closed**
Renovate Softball Field & Furnish & Install New Tennis Courts Crawford High School	No
Location	**Time**
Web Conference	05/20/2022 09:00 AM
Notes	
1st PreCon Mtg.	

Project Information

Assigned PSA Specialist: PSA Tester

General Contractor Information	**Pre-Award Activity Information**	**Contract Information**
General Contractor STRAIGHT LINE GENERAL CONTRACTORS, INC.	**Bid Number** CZ-17-0935-08	**Contract Number** CZ-17-0935-08.A1
CSLB License Number 760964	**Bid Title** Renovate Softball Field & Furnish & Install New Tennis Courts Crawford High School	**Contract Title** Renovate Softball Field & Furnish & Install New Tennis Courts Crawford High School
DIR Number 1000002142	**Prevailing Wage Determination**	**Contract Estimated Start-End Date** 03/01/2022 - 03/01/2024

Contract Summary Comments   1 ⌄

[   ]   Submit

lwalden@gafcon.com *02/28/2023 04:40 PM*
Overall Comments for project

BEGIN REVIEWING PREJOB FORMS – GC & SUBCONTRACTORS

- **Displays Published forms for review, details of form & assignment status will be assigned by Specialist after meeting**

View of Tiered Subcontractor

9. REGISTER FOR TEAMS PRE-JOB MEETINGS

- **Outlook Invite or Email invitation to Register for Pre-Job Conference Teams Webinar. Click on the link to register.**
  - *Note: Make sure to check SPAM for invite*

- **Click on Register Icon**

- **Fill out the form.** *IMPORTANT – Add your Union # or Company with your last name to appear when logged for Teams Attendee display & identified to speak during Pre-Job Conf. Mtgs.*

CONFIRMED REGISTRATION & can copy link to Share with other teammates or other stakeholders
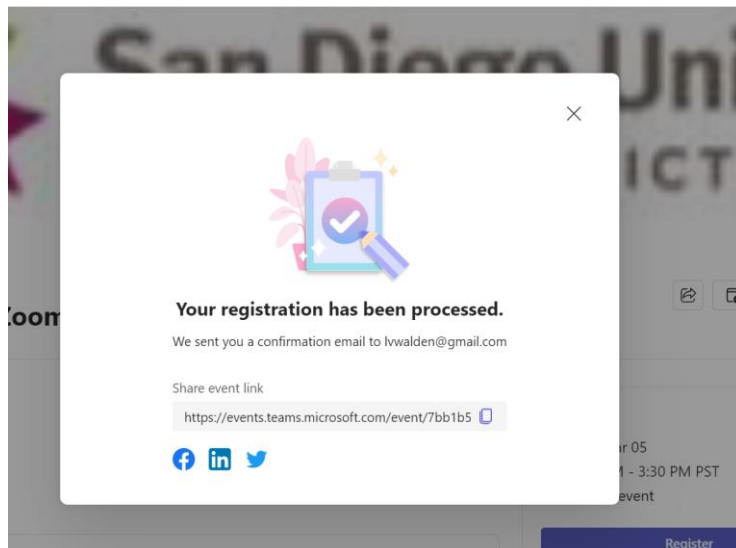
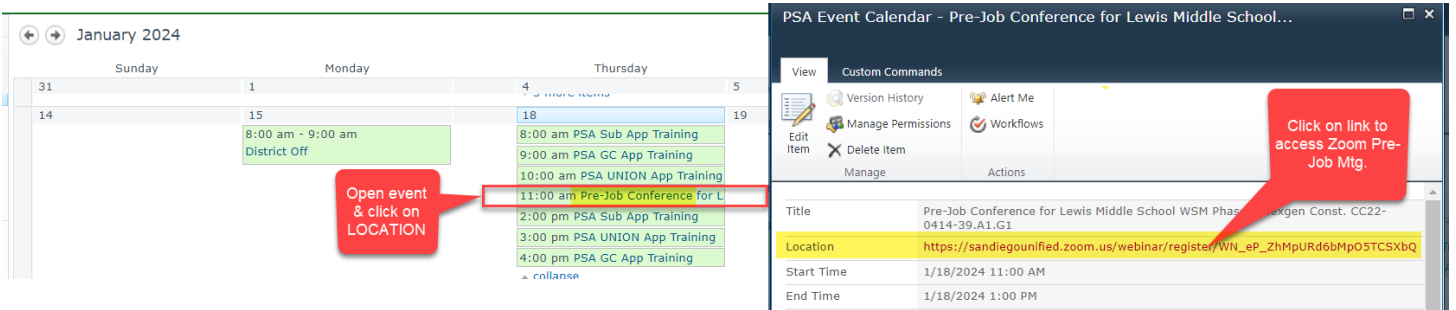- **Join Webinar with invitation or join from your Calendar. <mark>CLICK ON JOIN NOW & OPEN INTO TEAMS MEETING</mark>**
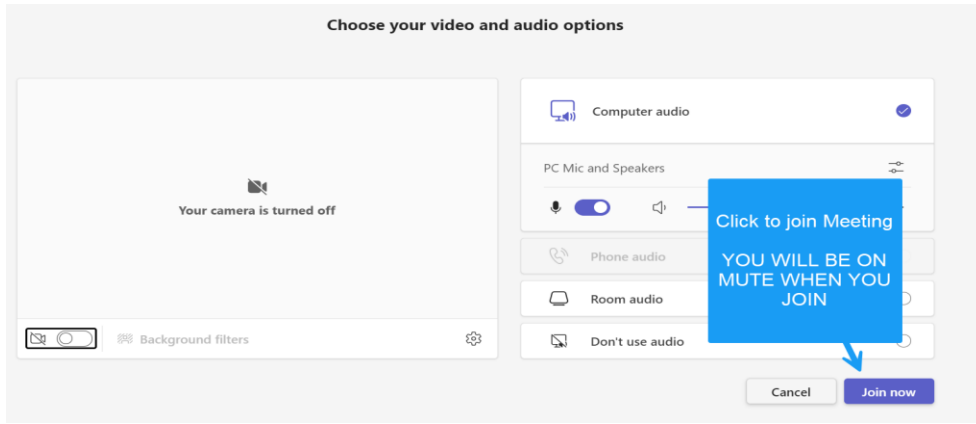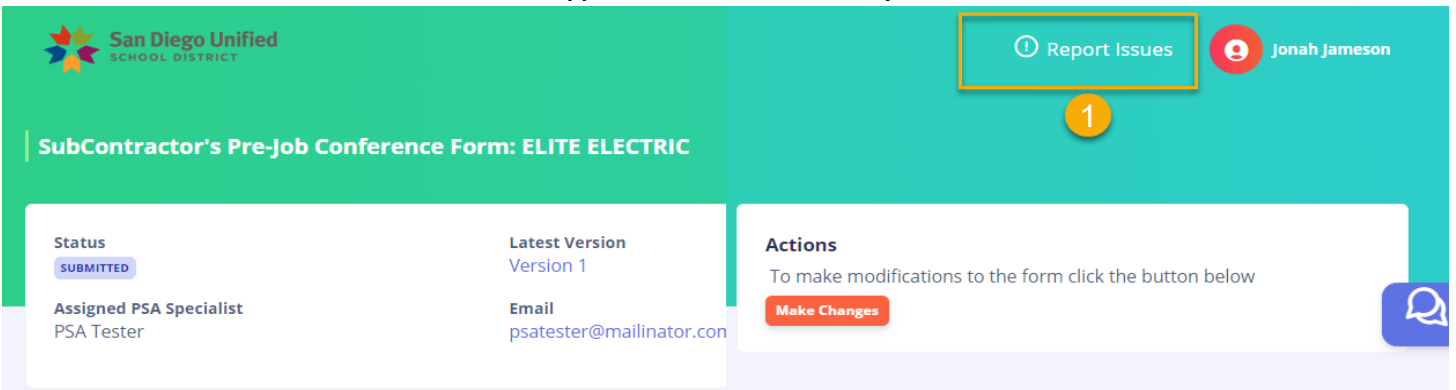

PSA EVENT CALENDAR TO ACCESS PRE-JOB MTG. GENERAL LINK -
https://fpcprojects.sandi.net/sites/PSA/App%20Support/Lists/PSA%20Event%20Calendar/calendar.aspx
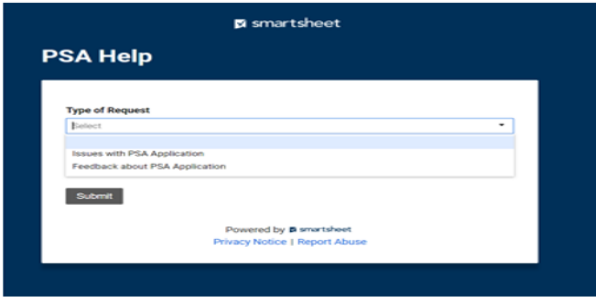

10.SUPPORT & REPORT ISSUES

- **Users can submit issues and submit support tickets from with the system**

- **Upper Right hand corner "!Report Issues" & form will be displayed walking you through submission**
- **IMPORTANT: If you can, take a screen capture of error message and copy the URL**
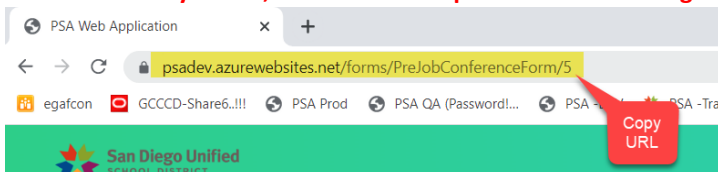
Type of Request – Select from drop down: 1. Issues with PSA Application or 2. Feedback about PSA Application

User Guides – located within Application or on the "Cloud" PSA and PWM Application Support

END OF USER GUIDE

REFERENCE INFORMATION

ACRONMN LIST
LIST

ABBR	TITLE
AGC	American General Contractors
CREW	Build Project Crew
CORE	Core Worker
WORKER	Core Worker
GC	General Contractor
LOA	Letter of Assent
PJCF	Pre-Job Conference Form
PJCM	Pre-Job Conference Meeting
PLOC	Project List of Contractors
PREJOB	Pre-Job Conference Form
PSA	Project Stabilization Agreement
PSAADMIN	PSA Administrator
SUB	Subcontractor
TIER	Tier-Subcontractor (works for sub)
UNION	Union Labor

What is the definition of PSA

Project Stabilization Agreement (PSA) It **establishes a standard for a contractor's relationship with his/her workers** by setting basic standards for hiring, dispute resolution, payment of fringe benefits, and utilization of apprentices, among other things. These basic standards come from the labor unions.