



PSA Online Application User Guide

Subcontractors & Tier Contractors

V2.0 2024

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User Guide Updates

Date	Updated by	Explanation
07/31/2023	Loretta Walden	2 Step Verification for login in
10/01/2023	Loretta Walden	LOA DocuSign Electronic
04/02/2024	Loretta Walden	Teams Webinar Registration & Supplier steps with no tier submission
10/02/2024	Loretta Walden	2.0 New Dashboard & Permissions for all users from same company have edit form capability

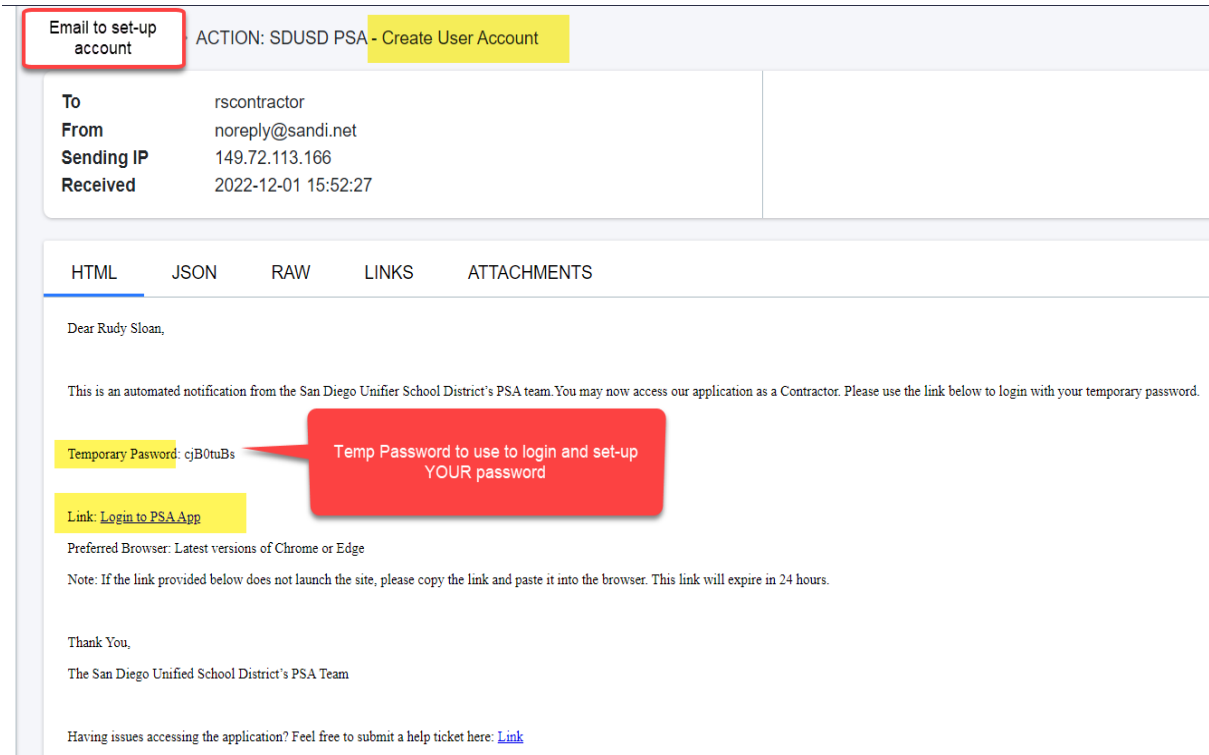
Release Summary Main Features:

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

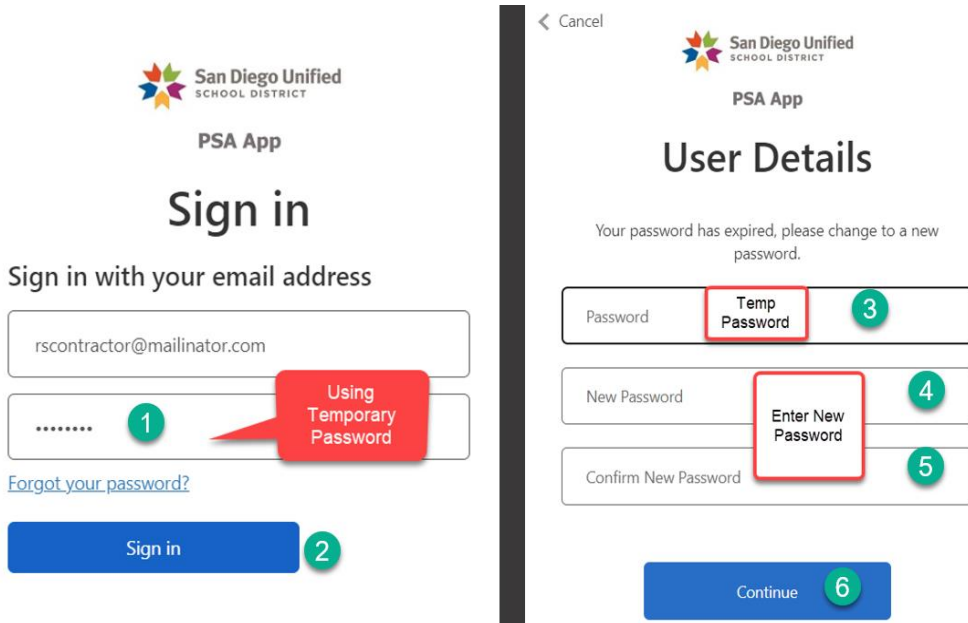
LINK TO PRODUCTION SITE: <https://psa.sandi.net>

1. INVITATION TO CREATE ACCOUNT

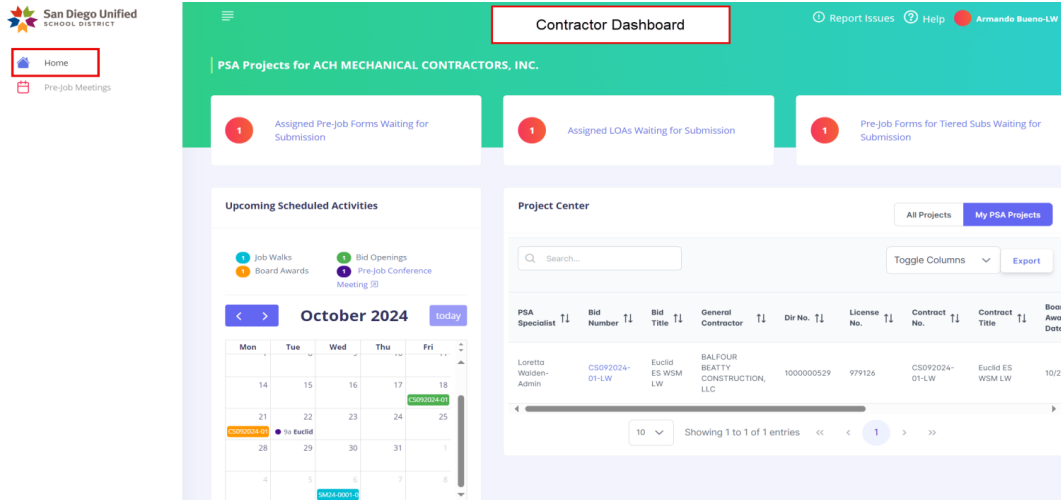
- Browser to use Application – **Chrome or Edge**
- One-time account set-up will be required by User and not required with each invitation to a new project
- Email invitation title will have “CREATE ACCOUNT”
- Use Temporary password to login & assign password



- Enter Temp password & User Password



- User will be sent to PSA Application Dashboard (Will review in more detail on Page



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
- Resend Email Invitation Link**, contact Specialist to resend email invitation

Project Invitation ACTION: SDUSD PSA - Submit CZ-22-CMGCTrain-01 - PSA App CMGC Train-01 Pre-Job Conference Form

To rscontractor
From noreply@sandi.net
Sending IP 149.72.113.166
Received 2022-12-01 18:50:39

HTML JSON RAW LINKS ATTACHMENTS

Dear Rudy Sloan,

This is an automated notification from the San Diego Unifier School District's PSA team. You may now access our application as a Contractor.

Bid Number: CZ-22-CMGCTrain-01
 Bid Title: PSA App CMGC Train-01
 Location: Euclid CDC
 Contract Number:
 Contract Title, if available:

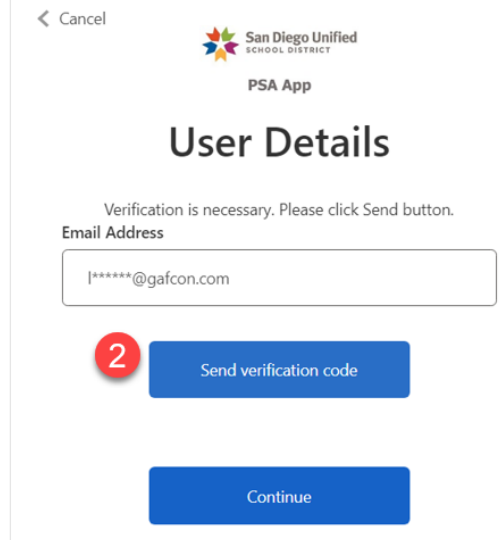
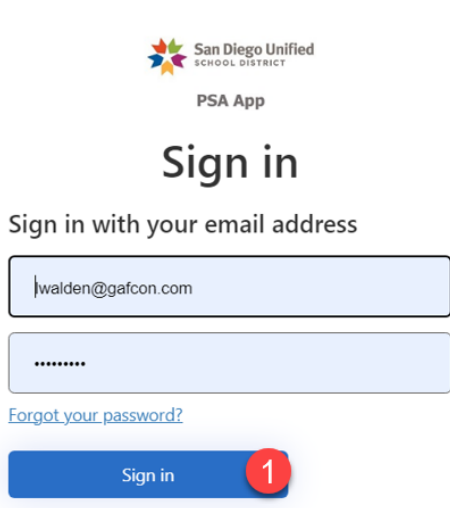
Click on the link below to access and complete the Pre-Job Conference Form for this project.

Link: ["RUDOLPH AND SLETTEN, INC." CZ-22-CMGCTrain-01 - PSA App CMGC Train-01 Pre-Job Conference Form](#)

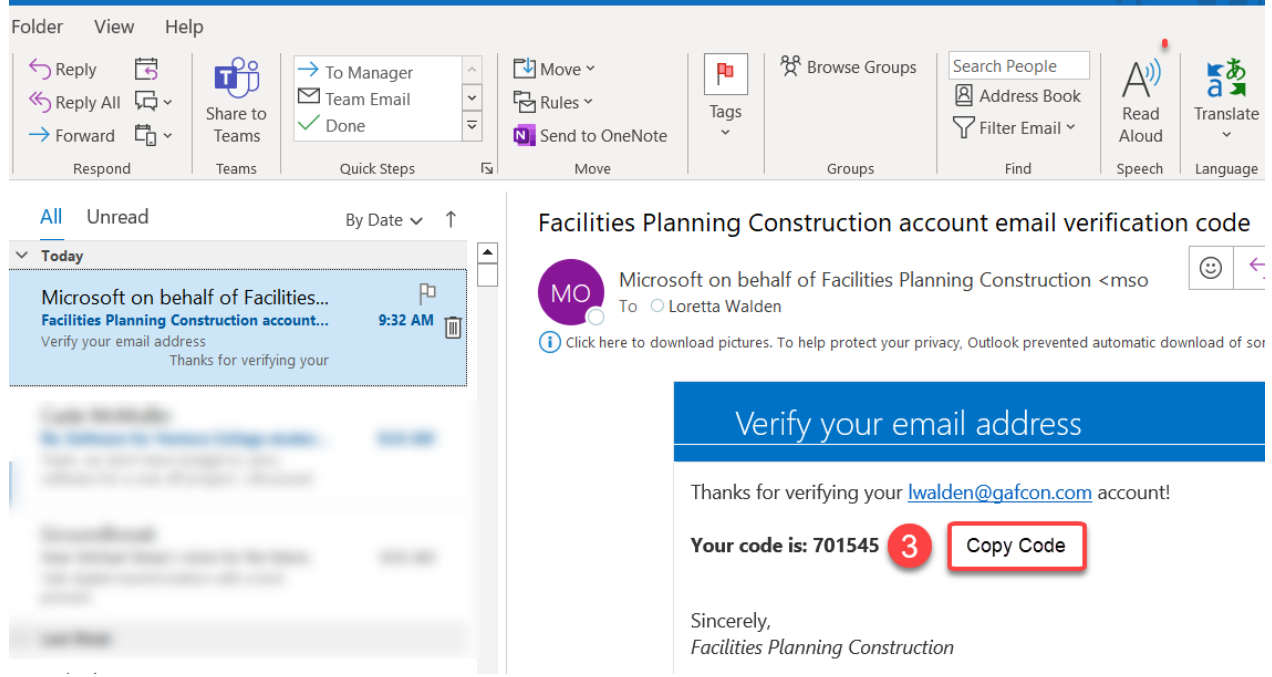
Use link to open project and Dashboard

3. LOGIN –Production web address: <https://psa.sandi.net/> & Forgot Password

- Log in screen, Sign In & Send Verification Code




- Go to Email and Copy Code or record code



- **Type or Paste code into Verification Code field & click on “Verify Code” Icon**

< Cancel



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

Verification code


 4

5 Verify code Send new code

Continue

- **Next Screen – Continue to Dashboard View of Application**

< Cancel



San Diego Unified
SCHOOL DISTRICT

PSA App


User Details

E-mail address verified. You can now continue.

Email Address

5 Continue

Sign in Screen – Email & Password. If you forgot password, use link below to reset & Temp Password will be sent.



San Diego Unified
SCHOOL DISTRICT

PSA App

Sign in

Sign in with your email address

 1

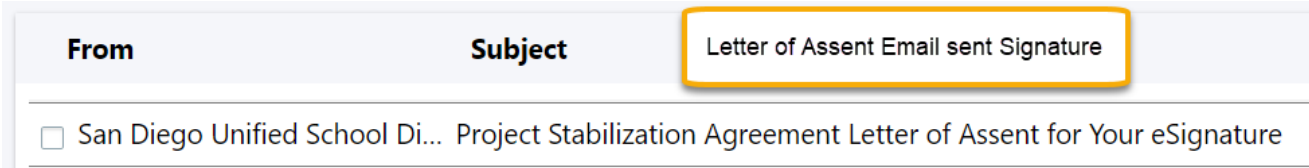
Password

[Forgot your password?](#) 2

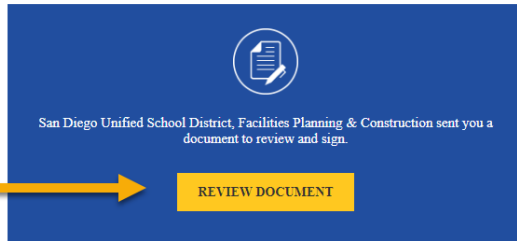
Sign in

4. LETTER OF ASSENT (LOA) DOCUSIGN ELETRONIC SIGNATURE SUBCONTRACTOR (Sign LOA & View LOA)

a) LOA Email sent to LOA Signer from Application



b) Open email & select "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

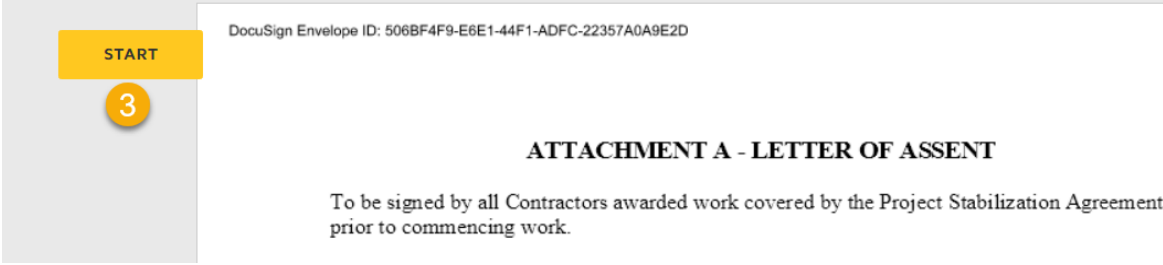
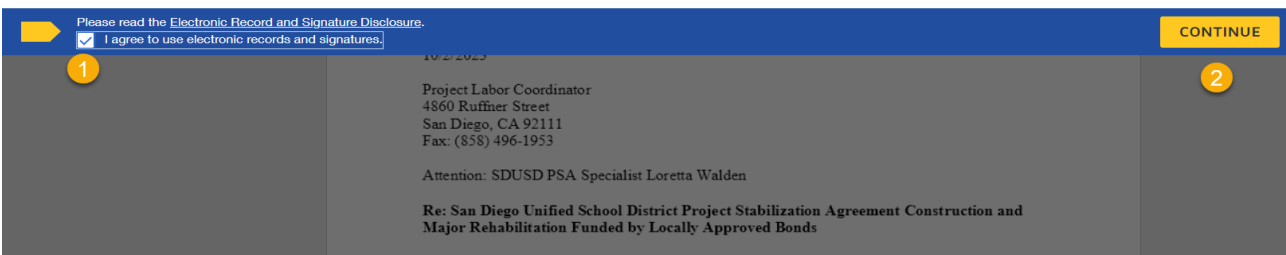
c) Start process of electronic signature

- Step 1 Check Mark, Step 2 Continue, Step 3 Start, Step 4

Please Review & Act on These Documents

San Diego Unified School District, Facilities Planning & Construction
Gafoon 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 read and submit a Letter of Assent (LOA) before beginning work on that project. You have been identified as a...



Sincerely,
CSM PLUMBING INC

SIGN

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 be used 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,
CSM **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 Assent prior to their commencement of work.

Sincerely,
CSM **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)]

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**

The Contractor Dashboard home page includes the following elements:

- Navigation:** Home (highlighted), Pre-job Meetings.
- Task Cards:** Three cards showing counts for 'Assigned Pre-Job Forms Waiting for Submission', 'Assigned LOAs Waiting for Submission', and 'Pre-Job Forms for Tiered Subs Waiting for Submission'.
- Upcoming Scheduled Activities:** A calendar for October 2024 showing activities like Job Walks, Board Awards, Bid Openings, and Pre-Job Conference Meetings.
- Project Center:** A table listing projects with columns for PSA Specialist, Bid Number, Bid Title, General Contractor, Dir. No., License No., Contract No., Contract Title, and Board Award Date.

TASKS

(Assigned Pre-Job Forms Waiting for Submission, Assigned LOAs Waiting Submission & Pre-job forms for Tiered Subs Waiting for Submission)

The Tasks section of the dashboard displays three task cards:

- Assigned Pre-Job Forms Waiting for Submission
- Assigned LOAs Waiting for Submission
- Pre-Job Forms for 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

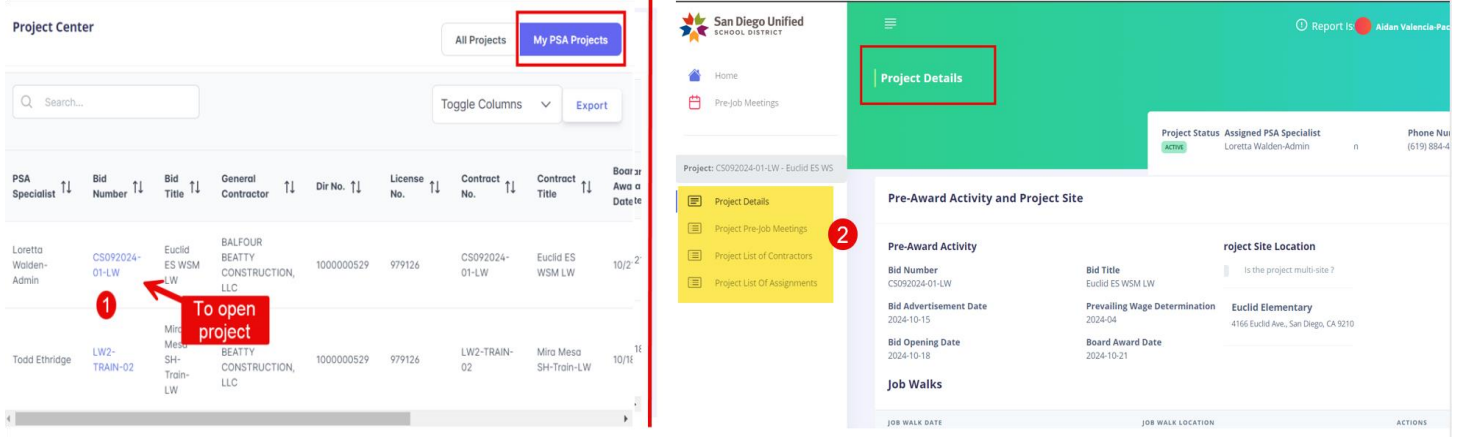
The Upcoming Scheduled Activities section shows a calendar for October 2024. A red arrow points to the 'Pre-Job Conference Meeting' on October 30th, with the instruction 'Click on Pre-Job Meeting to open'. Another red arrow points to the 'Pre-Job Conference Meeting' icon, with the instruction 'Select to open'.

The Project Details page for project CS092024-01 includes the following information:

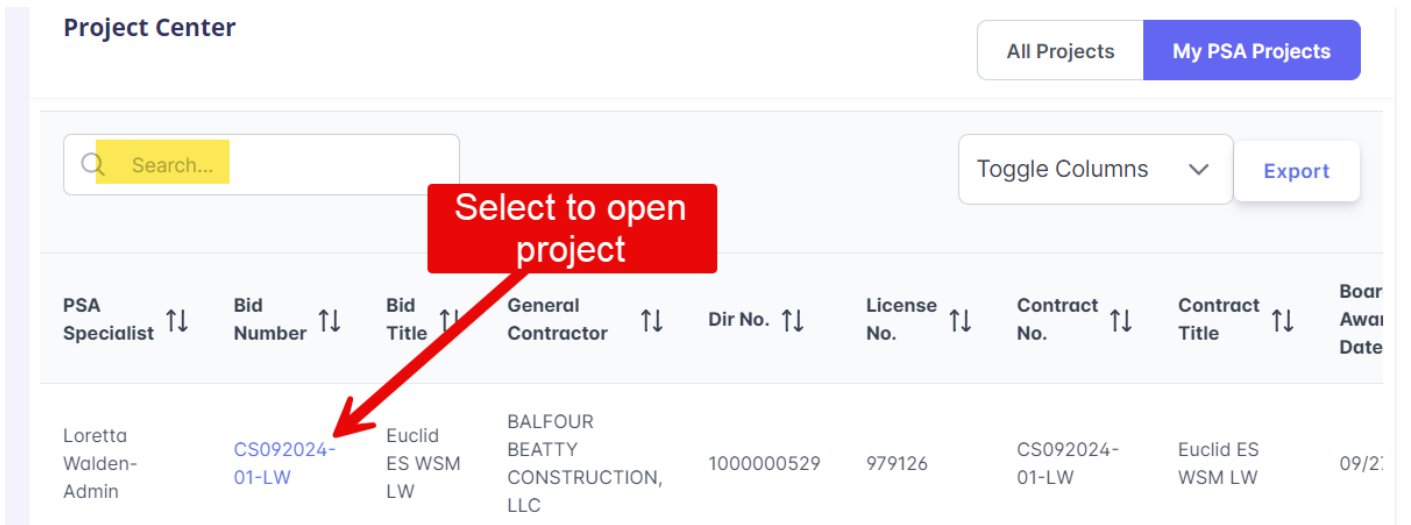
- Project Status:** Active
- Assigned PSA Specialist:** Loretta Walden-Admin
- Email:** lwalden@gpcton.com
- Pre-Award Activity and Project Site:**
 - Pre-Award Activity:** Bid Number CS092024-01-LW, Bid Title Euclid ES WSM LW, Bid Advertisement Date 2024-10-15, Bid Opening Date 2024-10-18.
 - Project Site Location:** Euclid Elementary, 4186 Euclid Ave., San Diego, CA 92105.
- Job Walks:** 09/15/2024 09:00 AM, 4186 Euclid Ave., San Diego, CA 92105.
- Contractor Information:**
 - General Contractor:** BALFOUR BEATTY CONSTRUCTION, LLC
 - DBA:** BALFOUR BEATTY CONSTRUCTION, LLC
 - CSLB License Number:** 979126
 - DIR Number:** 100000529
 - Company Address:** 13226 Evening Creek Drive North, Suite 270, SAN DIEGO, CA 92128
 - Phone Number:** [Redacted]
 - Fax Number:** [Redacted]
- Contract Information:**
 - Contract Number:** CS092024-01-LW
 - Contract Title:** Euclid ES WSM LW
 - Contract Estimated Start Date:** [Redacted]
 - Contract Estimated End Date:** [Redacted]

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**



San Diego Unified
SCHOOL DISTRICT

- Home
- Pre-Job Meetings

Project: CS092024-01-LW - Euclid ES WS

- Project Details**
- Project Pre-Job Meetings
- Project List of Contractors
- Project List Of Assignments

Project Details

Project Status
ACTIVE

Assigned PSA Specialist
Loretta Walden-Admin

Email
lwalden@gafcon.com

Phone Number
(619) 884-4500

Pre-Award Activity and Project Site

Pre-Award Activity

Bid Number CS092024-01-LW	Bid Title Euclid ES WSM LW
Bid Advertisement Date 2024-10-15	Prevailing Wage Determination 2024-04
Bid Opening Date 2024-10-18	Board Award Date 2024-10-21

Project Site Location

Is the project multi-site ?

Euclid Elementary
4166 Euclid Ave., San Diego, CA 92105

Job Walks

JOB WALK DATE	JOB WALK LOCATION	ACTIONS
09/15/2024 09:00 AM	4166 Euclid Ave., San Diego, CA 92105	

Contractor Information ⓘ

General Contractor BALFOUR BEATTY CONSTRUCTION, LLC	DBA	Project List of Contractors View Project List of Contractors
CSLB License Number 979126	DIR Number 100000529	
Company Address 13520 Evening Creek Drive North, Suite 270 SAN DIEGO, CA 92128	Phone Number	Fax Number
Subcontractors 5		Tiered Subcontractors 1

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

Contract Information

<p>Contract Number *</p> <input type="text" value="CS092024-01-LW"/>	<p>Contract Title *</p> <input type="text" value="Euclid ES WSM LW"/>
<p>Contract Estimated Start Date*</p> <input type="text" value="09/02/2024"/>	<p>Contract Estimated End Date</p> <input type="text" value="10/31/2026"/>
<p>Contract Amount</p> <input type="text" value="\$5,000,000.00"/>	<p>DIR Project Number</p> <input type="text" value="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

Contractor Information ⓘ

Access from Project Details

General Contractor
BALFOUR BEATTY CONSTRUCTION, LLC

CSLB License Number
979126

Company Address
13520 Evening Creek Drive
North, Suite 270
SAN DIEGO, CA 92128

DBA

DIR Number
100000529

Phone Number **Fax Number**

View Project List of Contractors ⓘ

Project List of Contractors

General Contractor
BALFOUR BEATTY CONSTRUCTION, LLC

Subcontractors
5

Tiered Subcontractors
1

Project List of Contractors Export to CSV

CONTRACTOR NAME	CONTRACTOR TYPE	ACTIVE	LETTER OF ASSENT	PRE-JOB FORM
BALFOUR BEATTY CONSTRUCTION, LLC NSP	General Contractor	<input checked="" type="checkbox"/>		cpeterson@fpcapp.testinator.com Status: Published Version 1 Open
ACH MECHANICAL CONTRACTORS, INC. NSP	Subcontractor	<input checked="" type="checkbox"/>	abueno@fpcapp.testinator.com View	abueno@fpcapp.testinator.com Status: Draft Version 1
BAY CITY MECHANICAL, INC. SP	Tiered Subcontractor	<input checked="" type="checkbox"/>	chantelle@fpcapp.testinator.com	chantelle@fpcapp.testinator.com Status: Revise and Resubmit Version 2
FAITH UTILITY INSTALLATION INC. SP	Subcontractor	<input checked="" type="checkbox"/>	Not Assigned	andrea@fpcapp.testinator.com Status: Published Version 1 Open
NEWMAN BACKHOE SERVICE, INC SP	Subcontractor	<input checked="" type="checkbox"/>	Not Assigned	amanda@fpcapp.testinator.com Status: Published Version 1 Open
PACIFIC SOUTHWEST STRUCTURES, INC. SP	Subcontractor	<input checked="" type="checkbox"/>	avalencia@fpcapp.testinator.com	avalencia@fpcapp.testinator.com Status: Published Version 1 Open

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**

Project List Of Contractors

General Contractor Information

General Contractor
BALFOUR BEATTY CONSTRUCTION, LLC

Pre-Award Activity Information

Bid Number
CS092024-01-LW

Bid Title
Euclid ES WSM LW

Contract Information

Contract Number
CS092024-01-LW

Contract Title
Euclid ES WSM LW

Project List of Contractors Export to CSV

CONTRACTOR NAME	CONTRACTOR TYPE	ACTIVE	LETTER OF ASSENT	PRE-JOB FORM
BALFOUR BEATTY CONSTRUCTION, LLC NSP	General Contractor	<input checked="" type="checkbox"/>		cpeterson@fpcapp.testinator.com Status: Not Started Version 1 Select to open
ACH MECHANICAL CONTRACTORS, INC. NSP	Subcontractor	<input checked="" type="checkbox"/>	abueno@fpcapp.testinator.com View	abueno@fpcapp.testinator.com Status: Draft Version 1 Complete
BAY CITY MECHANICAL, INC. NSP	Tiered Subcontractor	<input checked="" type="checkbox"/>	Not Assigned	chantelle@fpcapp.testinator.com Status: Not Started Version 1

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 Contractors

Export to CSV

CONTRACTOR NAME	CONTRACTOR TYPE	ACTIVE	LETTER OF ASSENT	PRE-JOB FORM
PACIFIC SOUTHWEST STRUCTURES, INC. NSP	Subcontractor	<input checked="" type="checkbox"/>	Not Assigned	avalencia@ipcapp.testinator.com Status: Draft Version 1 BEING EDITED BY: FERNADO PACIFICSOUTHWESTSUB

Shows another user from company editing form

PROJECT LIST OF ASSIGNMENTS

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

Project: CS092024-01-LW - Euclid ES WS

- Project Details
- Project Pre-Job Meetings
- Project List of Contractors
- Project List Of Assignments

Project List of Assignments

— Collapse All + Expand All

Filters: My Unions Pending Assignments Only Accepted Assignments Only

CONTRACTOR	MY UNION	PRE-JOB STATUS
General Contractor BALFOUR BEATTY CONSTRUCTION, LLC NSP	NO	Published
Subcontractor ACH MECHANICAL CONTRACTORS, INC. NSP	NO	Draft
Tiered Subcontractor ASSOCIATE MECHANICAL CONTRACTORS, INC. NSP	NO	Not Started
Tiered Subcontractor BAY CITY MECHANICAL, INC. SP	YES	Revise and Resubmit
Subcontractor FAITH UTILITY INSTALLATION INC. SP	NO	Published
Subcontractor NEWMAN BACKHOE SERVICE, INC SP	NO	Published
Subcontractor PACIFIC SOUTHWEST STRUCTURES, INC. SP	NO	Published
Subcontractor WINEGARDNER MASONRY, INC. NSP	NO	Not Started

Subcontractor
FAITH UTILITY INSTALLATION INC. SP

NO Published

Crew: Exterior Installation #1

Scope Of Work To Be Performed
Scope of Work Exterior Installation

Union Assignment Detail from Form

Equipment To Be Utilized
Equipment Install Lift, other tools

DIR CLASSIFICATION	UNION	ASSIGNMENT STATUS	ASSIGNMENT ACTIVITIES
Drywall Installer Lather	Operating Engineers Local 17	Pending	Exterior Installation

Dashboard PRE-JOB MEETINGS

Pre-Job Conference Meetings

Search...

PSA Specialist ↑↓	Title ↑↓	Meeting Date ↓↑	Meeting Closed ↑↓	Project ↑↓	Notes ↑↓
Loretta Walden-Admin	Euclid ES Pre-Job Conference Session 03	10/24/2024 10:00 AM	No	Euclid ES WSM LW	After registering, you will receive a motion about joining the webinar & reminder email to mtg. Support Specialist Loretta Vris III gharris@sandi.net Rey Pedregon rpedregon@psa-specialist.com PSA Specialist Lead Rey Pedregon-in Karakas-pkarakas@conanconstruction.com GC Ihusted@conanconstruction.com O'eavilali@sandi.net Ivory Anderson-landerson1@sc tethridge1@sandi.net Rey Pedregon-mcruz5@sandi.net Carol Kim-carol@sbuildingtr fpena@swcarpenters.org Pelin Karaci.com Lily Husted- Ihusted@conanconstruction.co
Loretta Walden-Admin	Euclid ES Pre-Job Conference Session 01	10/22/2024 09:00 AM	Yes. Closed on 10/10/2024	Euclid ES WSM LW	Session 01 Pre-job mtg. CO-ORGANDI.net Rey Pedregon rpedregon@sandi.net PRESEI Lead Rey Pedregon-rpedregon@sarakas@conanconstruction.com GC Assist. Lily Husted- Ihusted@conanconstruction.com OTHER PANELISTS Edmundo Avila h-landerson1@sandi.net Todd Ethridge tethridge1@sandi.net Rey Pedregon-mcruz5@sandi.net Maria Cruz-m@sdbuildingtrades.com Francisco Pena-fpena@swcarpenters.org pkarakas@conanconstruction.com uction.com
Loretta Walden-Admin	Euclid ES Pre-Job Conference Session 02	10/20/2024 09:00 AM	No	Euclid ES WSM LW	CO-ORGANIZER George Harris III gharris@sandi.net PRESENTERS - Speakers PSA Specialist Loretta Walden-Admin rpedregon@sandi.net GC Lead Peluccion.com GC Assist. Lily Husted- Ihusted@conanconstruction.com Edmundo Avila h-landerson1@sandi.net Todd Ethridge tethridge1@sandi.net Rey Pedregon-mcruz5@sandi.net Carol Kim-risco Pena-fpena@swcarpenters.org Pelin Karakas Lily Husted- Ihusted@conanconstruction.com

To go back to Project Center, select “Home”

San Diego Unified SCHOOL DISTRICT

Home

Pre-Job Meetings

Pre-Job Conference Meetings

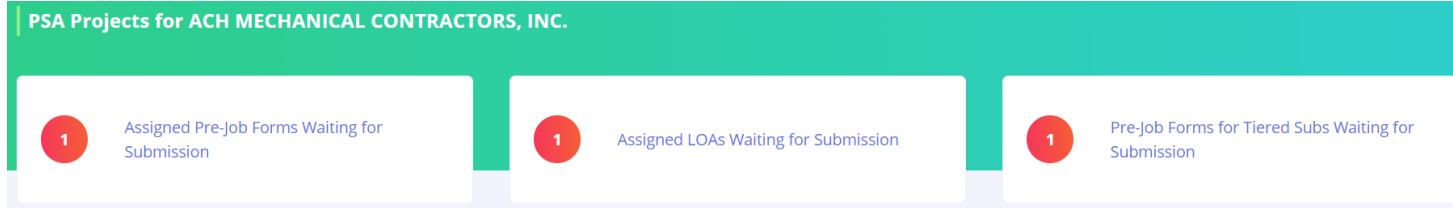
Search...

PSA Specialist ↑↓	Title ↑↓	Meeting Date ↓↑	Meeting Closed ↑↓
Sean Mahar	Meet in the middle	11/06/2024 10:00 AM	Yes. Closed on 10/08/2024

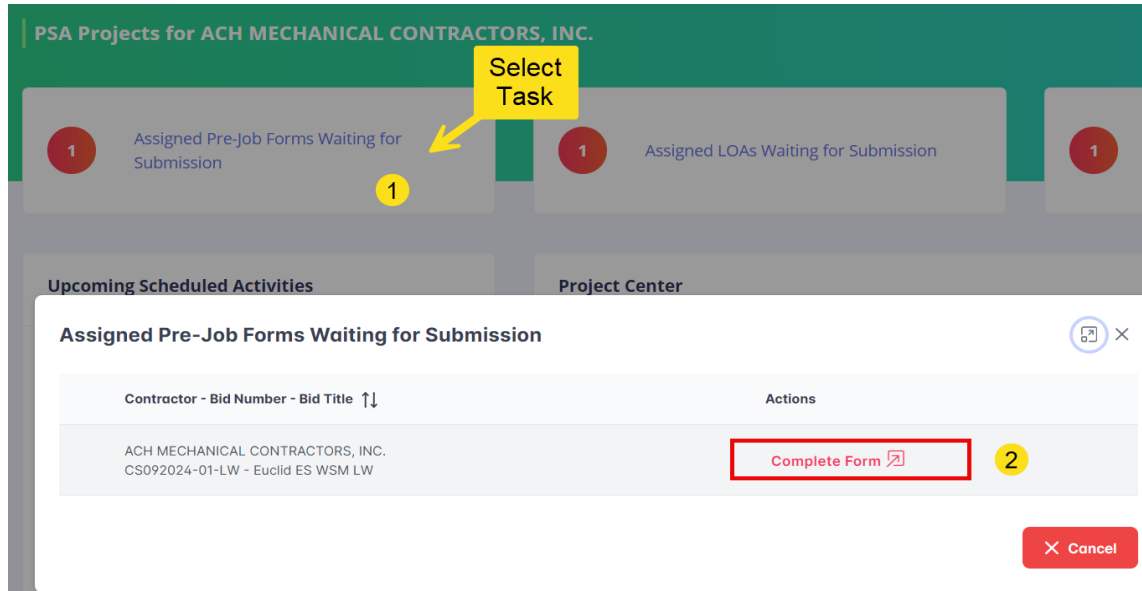
6. PRE-JOB SUBCONTRACTOR CONFERENCE FORM STEPS

From Dashboard complete form

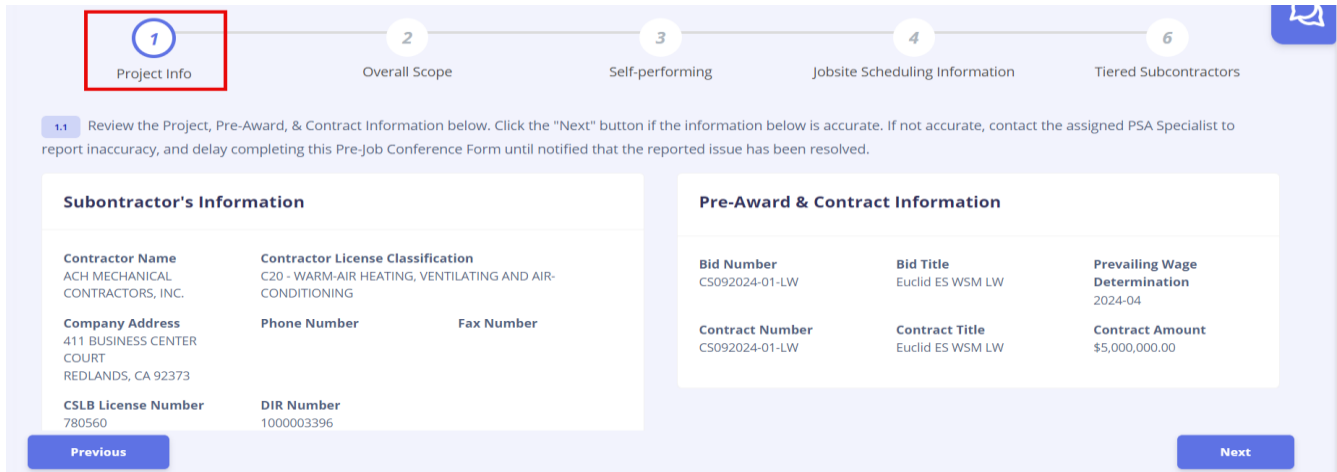
- a. **START WITH TASKS** (Assigned Pre-Job forms Waiting for Submission, Assigned LOAs Waiting for Submission and Pre-Job Forms for Tiered Subs Waiting for Submission)



- b. Select Assigned Pre-Job Forms waiting for Submission start completion of form & select "Complete Form"



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



Step 2 – Overall Scope of Work & click NEXT

- Enter Overall Scope of Work & click NEXT. Include Tier Work with your SCOPE of work.
- **Sample:** *Installation of onsite trailers, including grading, under trailer stabilizers, connecting prefabbed decks and stairs; temp power (tier sub-Power Plus) and plumbing (tier sub-Advance Plumbing) hook ups.*

Step 3 – Self-Performing

- Yes - Performing– will then record work performing
- No - will move to next Jobsite Scheduling Information for (1) main contact

Step 4 – Jobsite Scheduling Information

- Expected Start Date
- Estimate Duration (Days)
- Number of Shifts & Shift Description (Shift 1 – 6:00 am to 3pm)
- Pay Day and & Pay Period End of Day

Step 4 - Jobsite Scheduling Information- continued

- **Jobsite Administration** – Superintendent will required & check mark by default
 - First, Last, Email & Phone Number
- **“Add Other Jobsite Administration”** names as necessary & NEXT

4.2 Enter the Jobsite Administrators(Superintendent, Lead, Foreman are default). If you need to add another Jobsite manager or administrator use the button "Add Other Jobsite Administrator(s)" button.

Jobsite Administration

Use for additional job site contacts
Add 'Other' Jobsite Administrator(s) ⊕

JOBSITE CONTACT #	ADMINISTRATIVE ROLE	FIRST NAME 1	LAST NAME 2	EMAIL 3	PHONE 4
<input checked="" type="checkbox"/>	Superintendent	Jim	Rice	esm@na.com	(619) 999-3333
<input type="checkbox"/>	Lead	Type the Name 2...	Type the Last Name 2...	Ex. user@organization.com	Type the Phone Number 2...
<input type="checkbox"/>	Foreman	Type the Name 3...	Type the Last Name 3...	Ex. user@organization.com	Type the Phone Number 3...

Previous
Next 5

Step 5 -Crews and Assignments (Crew, Scope of Work, Equipment)

- **Add Crew+**

1
Project Info

2
Overall Scope

3
Self-performing

4
Jobsite Scheduling Information

5
Crews and Assignments

6
Tiered Subcontractors

5.1 Please create as many crews as is required to describe the work your firm will perform on this contract. For example, if you are performing "Demolition" and "Grading" and anticipate separate work crews performing work at different times, then you would submit a separate description for the "Demolition" scope of work and the "Grading" scope of work.

Add crew ⊕
←

Previous
Next

- Crew name, Scope of work and Equipment utilized & **MUST SAVE Crew prior to doing assignments**
 - **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
 - **Sample:** *Rough grade laydown are for trailer, assisting with off-loading trailers, set up and adjustment of under trailer stabilizers, installation of prefabbed decks and stairs, safety anti-slip paint application to decks and stairs.*

1
Project Info

2
Overall Scope

3
Self-performing

4
Jobsite Scheduling Information

5
Crews and Assignments

6
Tiered Subcontractors

5.1 Please create as many crews as is required to describe the work your firm will perform on this contract. For example, if you are performing "Demolition" and "Grading" and anticipate separate work crews performing work at different times, then you would submit a separate description for the "Demolition" scope of work and the "Grading" scope of work.

Crew:

Save
Delete

Scope of Work your firm will perform on this Project *

Scope of Work Exterior Installation

Equipment to be utilized in performing work on this Project *

Equipment Install Lift, other tools



• **Add Assignments+**

- **Union – use drop down to select or type name for quick find.**
- **Activities / Responsibilities**
- **Date – start & end**
- **Estimated Works Average & Peak & SAVE.**
- **AS NEEDED- Add Assignment+ to additional to same crew OR “ADD CREW” if more crews to record & NEXT**
- **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

Referral and Jurisdictional Assignment

Add assignment (+)

UNION - DIR CLASSIFICATION	ASSIGNMENT STATUS	ASSIGNMENT ACTIVITIES	ASSIGNMENT ACTIVITIES STATUS	ESTIMATED START DATE	ESTIMATED END DATE	ESTIMATED WORKFORCE AVERAGE	ESTIMATED WORKFORCE PEAK	ACTIONS
Operating Engineers Local 17 -- Drywall Installer Lather		Exterior Installation		11/18/2024	11/29/2024	2	4	Save Delete

Add crew (+)

Previous Next

Step 6 -Tiered Subcontractor

- **No Tiered Subcontractor-** then next step is Submit
- **Tiered Subcontractor not under Contract** – check TBD & enter Scope of Work
- **Tiered Subcontractor in PSA system, use drop down to select,** enter scope of work & Submit
 - **Tiered Subcontractor not in drop down,** select TBD & use Scope of Work to add name, then contact Specialist to add

6.1 Describe any Scope of Work that will be performed by a Tiered Subcontractor. please check the TBD checkbox

Add other direct Subcontractors not included on the Division of Work **Add Tiered Subcontractor Scope Of Work** (+)

TBD?	TIERED SUBCONTRACTOR	TIERED SUBCONTRACTOR SCOPE	ACTIONS
<input checked="" type="checkbox"/> 1		Type the Tiered Subcontractor's Scope of Work... 2	3 Save Delete
<input type="checkbox"/>	Search and Select a contractor	Type the Tiered Subcontractor's Scope of Work... 2	3 Save Delete

NEXTGEN CONSTRUCTION, INC.
 CSLB: 1040906 DIR: 1000063293

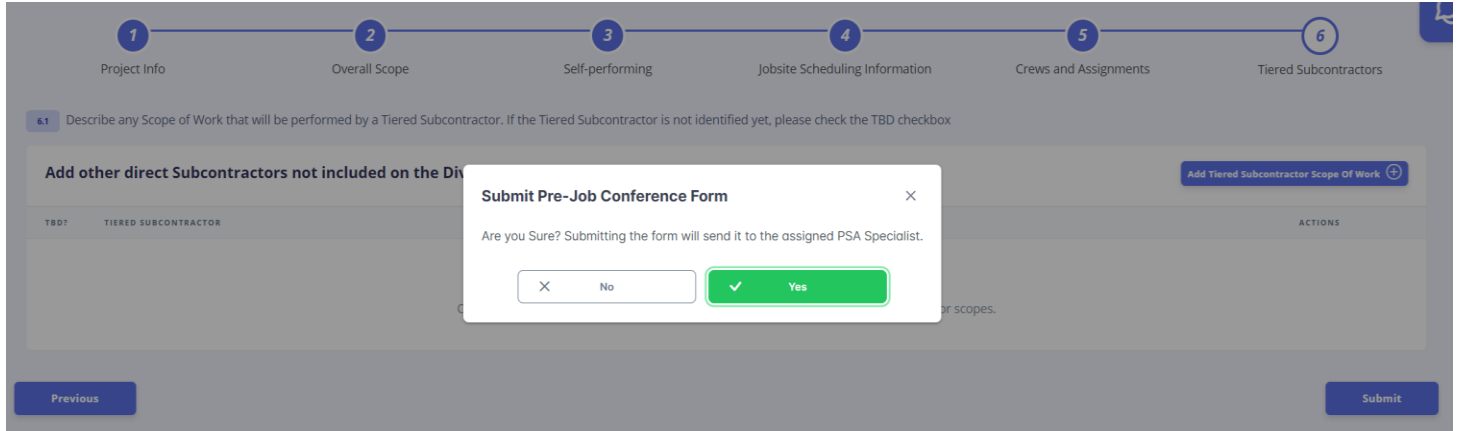
Superior Air Inc
 CSLB: 669421 DIR: 1000040104

Select Subcontractor

Previous **Submit**

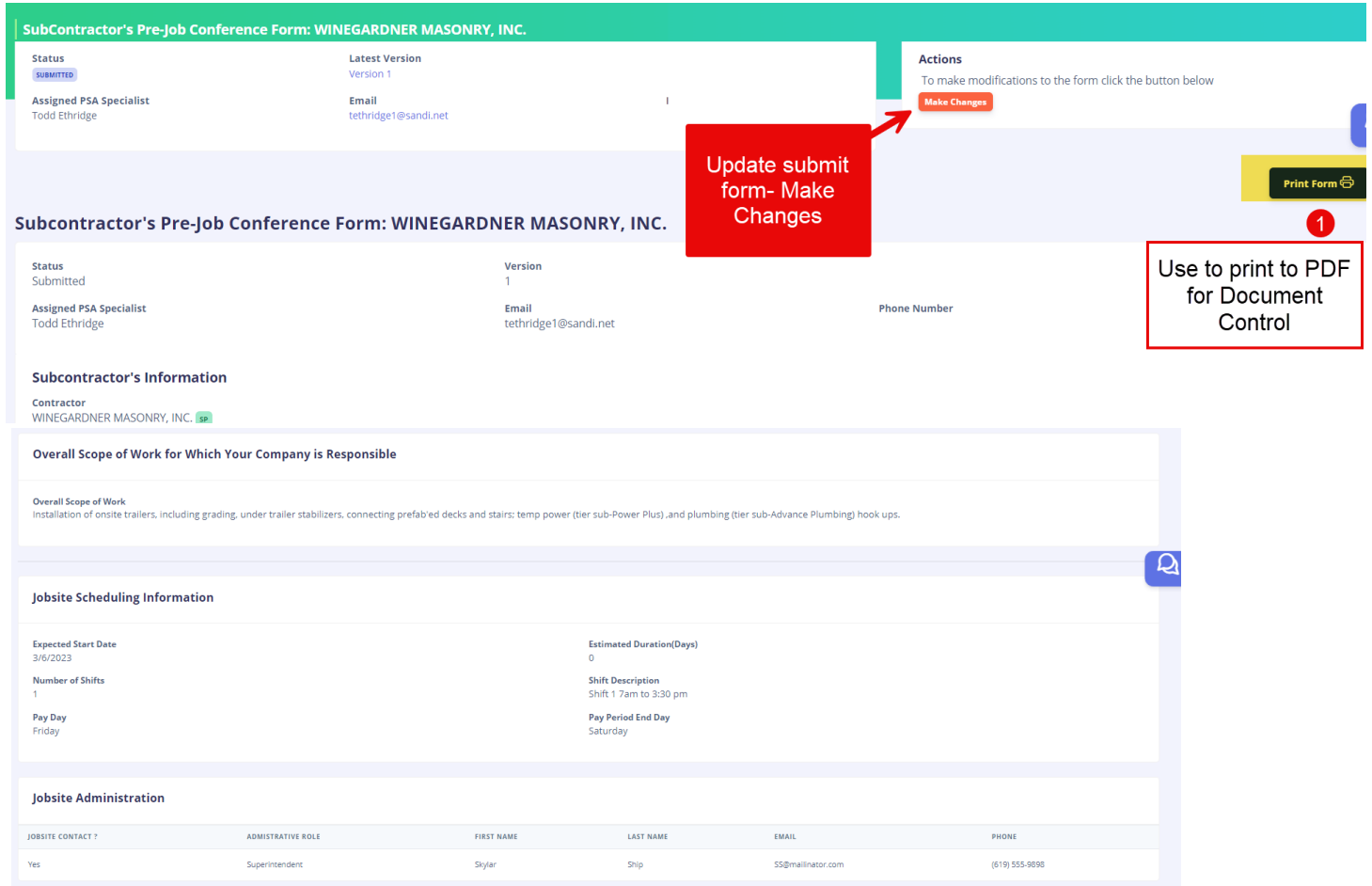
SUBMIT – Would like to submit form?

- 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)



Crew: Installation of trailers

Scope of Work your firm will perform on this project
 Rough grade laydown are for trailer, assisting with off-loading trailers, set up and adjustment of under trailer stabilizers, installation of prefabricated decks and stairs, safety anti-slip paint application to decks and stairs.

Equipment to be utilized in performing work on this Project
 Bob Cat, Grader, Hand and power tools

Referral and Jurisdictional Assignment

UNION	DIR CLASSIFICATION	ASSIGNMENT STATUS	CREW MEMBER ACTIVITIES/RESPONSIBILITIES	SUMMARY OF WORK STATUS	ESTIMATED START - END DATE	ESTIMATED WORKFORCE AVERAGE	ESTIMATED WORKFORCE PEAK
Operating Engineers Local 12	Operator	Pending	All equipment work, including rough grading and minor excavation	Pending	3/6/2023 - 3/8/2023	2	3
Laborers Local 89	Laborer	Pending	Set up stabilizers, prefabricated decks and stairs, any hand grading	Pending	3/8/2023 - 3/10/2023	4	8
Painters Local 1399	Industrial Painter	Pending	Application of anti-slip paint application to decks and stairs	Pending	3/13/2023 - 3/14/2023	2	2

Add other direct Subcontractors not included on the Division of Work

TBD?	TIERED SUBCONTRACTOR	TIERED SUBCONTRACTOR'S SCOPE
No	POWER PLUS	Hooking up temp power to trailers
No	STRELIC PLUMBING, INC	Hooking up water and sewer to trailers

Print View

12/1/22, 8:46 PM
PSA Web Application

General Contractor's Pre-Job Conference Form: "RUDOLPH AND SLETTEN, INC."

Status Submitted	Version 1	
Assigned PSA Specialist PSA Tester	Email psatester@mailinator.com	Phone Number 212-555-1212

General Contractor Information

General Contractor
"RUDOLPH AND SLETTEN, INC."

Company Address "2 CIRCLE STAR WAY, 4TH FLOOR" SAN CARLOS, CA 94070	Phone Number	Fax Number
--	---------------------	-------------------

CSLB License Number
198069

DIR Number
1000000658

Contractor License Classification
B - GENERAL BUILDING

Pre-Award & Contract Information

Bid Number CZ-22-CMGCTrain-01	Bid Title PSA App CMGC Train-01	Prevailing Wage Determination 2022.02
Contract Number	Contract Title	Contract Amount

Contract Summary

Estimated Construction Start Date 1/10/2023	Estimated Construction End Date 1/10/2024
---	---

Print 3 pages

Destination Save as PDF

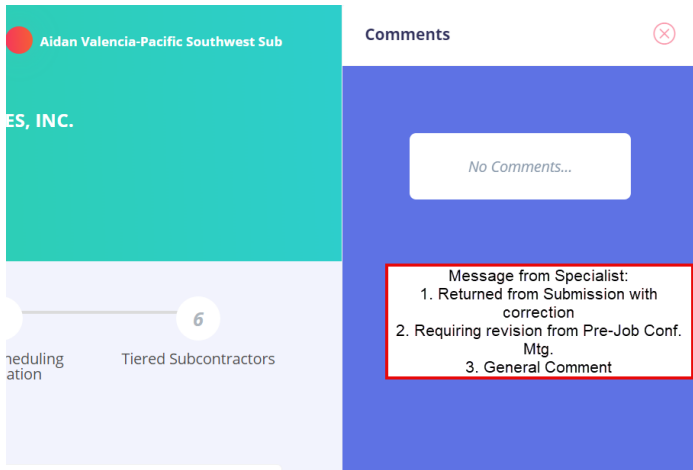
Pages All

Layout Portrait

More settings v

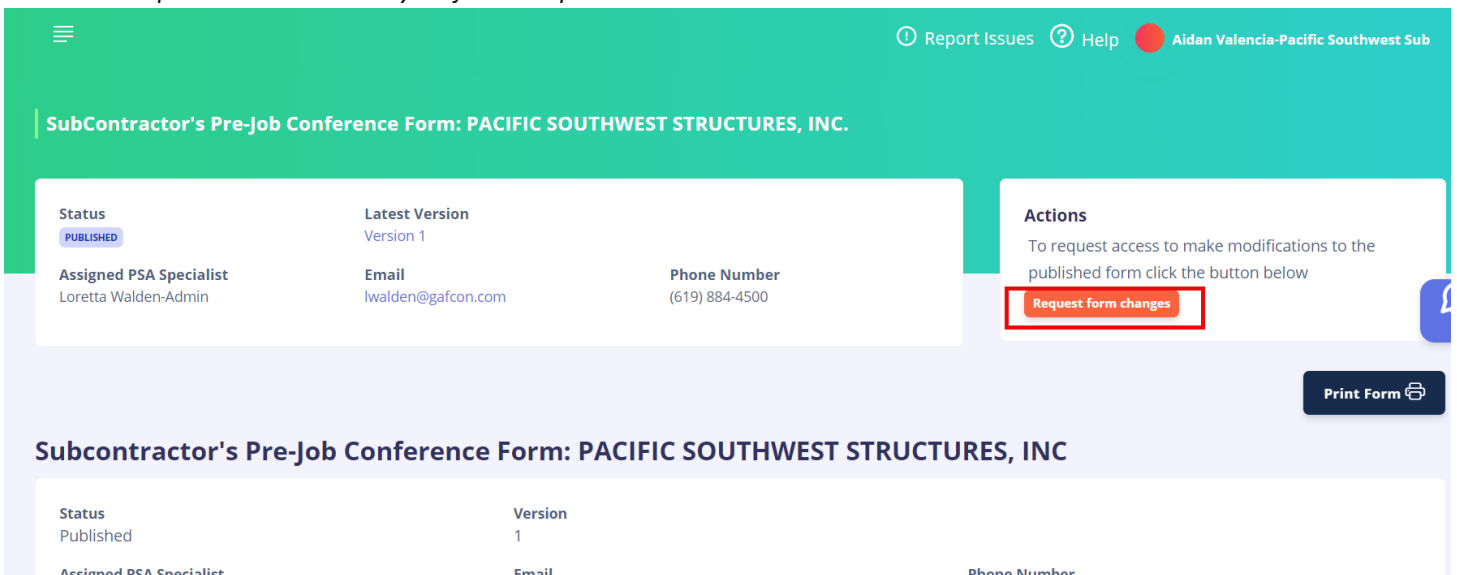
Save
Cancel

COMMENTS when you see Icon , you can click on "Comment" Icon display message from Specialist. When form is returned, you will see comment from Pre-Job Conference Mtg.

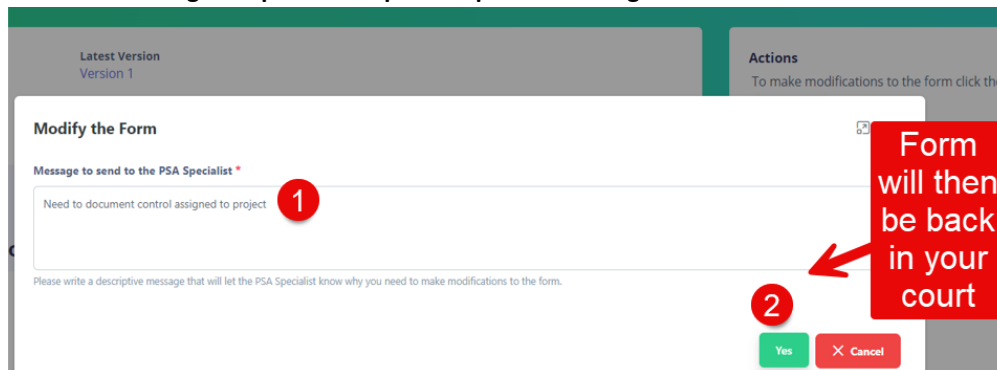


7. MAKE CHANGES TO FORM OR REVISE & RESUBMIT

- **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 MEETING

- Meeting will start with the Specialist starting the meeting. The General Contractor (GC) will then take the lead and present each Subcontractor and Tiered Subcontractor(s) review scope of work, equipment used, and work assignments
- 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

Report Issues Help Aidan Valencia-Pacific Southwest SU

Pre-Job Conference Meeting

<div style="background-color: #e0f2f1; padding: 5px; margin-bottom: 5px;">Meeting Details</div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Title Euclid ES Pre-Job Conference Session 02</td> <td style="width: 40%;">Closed No</td> </tr> <tr> <td colspan="2">Time 10/20/2024 09:00 AM</td> </tr> <tr> <td colspan="2">Notes CO-ORGANIZER George Harris III gharris@sandi.net Rey Pedregon rpedregon@sandi.net PRESENTERS - Speakers PSA Specialist Lead Rey Pedregon-rpedregon@sandi.net GC Lead Pelin Karakas-pkarakas@conanconstruction.com GC Assist. Lily Husted-lhusted@conanconstruction.com OTHER PANELISTS Edmundo Avila ll-eavilali@sandi.net Ivory Anderson-landerson1@sandi.net Todd Ethridge tethridge1@sandi.net Rey Pedregon-rpedregon@sandi.net Maria Cruz-mcruz5@sandi.net Carol Kim-carol@sdbuildingtrades.com Francisco Pena-fpena@swcarpenters.org Pelin Karakas-pkarakas@conanconstruction.com Lily Husted-lhusted@conanconstruction.com</td> </tr> </table>	Title Euclid ES Pre-Job Conference Session 02	Closed No	Time 10/20/2024 09:00 AM		Notes CO-ORGANIZER George Harris III gharris@sandi.net Rey Pedregon rpedregon@sandi.net PRESENTERS - Speakers PSA Specialist Lead Rey Pedregon-rpedregon@sandi.net GC Lead Pelin Karakas-pkarakas@conanconstruction.com GC Assist. Lily Husted-lhusted@conanconstruction.com OTHER PANELISTS Edmundo Avila ll-eavilali@sandi.net Ivory Anderson-landerson1@sandi.net Todd Ethridge tethridge1@sandi.net Rey Pedregon-rpedregon@sandi.net Maria Cruz-mcruz5@sandi.net Carol Kim-carol@sdbuildingtrades.com Francisco Pena-fpena@swcarpenters.org Pelin Karakas-pkarakas@conanconstruction.com Lily Husted-lhusted@conanconstruction.com		<div style="background-color: #e0f2f1; padding: 5px; margin-bottom: 5px;">Project Information</div> <p>Assigned PSA Specialist: Loretta Walden-Admin</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top; padding: 5px;"> General Contractor Information General Contractor BALFOUR BEATTY CONSTRUCTION, LLC CSLB License Number 979126 DIR Number 1000000529 </td> <td style="width: 33%; vertical-align: top; padding: 5px;"> Pre-Award Activity Information Bid Number CS092024-01-LW Bid Title Euclid ES WSM LW Prevailing Wage Determination 2024-04 </td> <td style="width: 34%; vertical-align: top; padding: 5px;"> Contract Information <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Contract Number CS092024-01-LW</td> <td style="width: 50%;">Contract Estimated START Date 09/02/2024</td> </tr> <tr> <td>Contract Title Euclid ES WSM LW</td> <td>Contract Estimated END Date 10/31/2026</td> </tr> <tr> <td>Contract Amount \$5,000,000.00</td> <td>DIR Project Number 4553443</td> </tr> </table> </td> </tr> </table>	General Contractor Information General Contractor BALFOUR BEATTY CONSTRUCTION, LLC CSLB License Number 979126 DIR Number 1000000529	Pre-Award Activity Information Bid Number CS092024-01-LW Bid Title Euclid ES WSM LW Prevailing Wage Determination 2024-04	Contract Information <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Contract Number CS092024-01-LW</td> <td style="width: 50%;">Contract Estimated START Date 09/02/2024</td> </tr> <tr> <td>Contract Title Euclid ES WSM LW</td> <td>Contract Estimated END Date 10/31/2026</td> </tr> <tr> <td>Contract Amount \$5,000,000.00</td> <td>DIR Project Number 4553443</td> </tr> </table>	Contract Number CS092024-01-LW	Contract Estimated START Date 09/02/2024	Contract Title Euclid ES WSM LW	Contract Estimated END Date 10/31/2026	Contract Amount \$5,000,000.00	DIR Project Number 4553443
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Contract Title Euclid ES WSM LW	Contract Estimated END Date 10/31/2026															
Contract Amount \$5,000,000.00	DIR Project Number 4553443															

Contract Summary Comments

No Comments...

Contractors Sub List – Displays Published forms for review, details of form & assignment status will be assigned by Specialist after meeting

Contractor List

IS ATTENDING - CONTRACTOR	Published
General Contractor -BALFOUR BEATTY CONSTRUCTION, LLC (NSP)	Published
Subcontractor -ACH MECHANICAL CONTRACTORS, INC. (NSP)	Draft
Tiered Subcontractor ASSOCIATE MECHANICAL CONTRACTORS, INC. (NSP)	Not Started
Tiered Subcontractor -BAY CITY MECHANICAL, INC. (SP)	Revise and Resubmit
Subcontractor -FAITH UTILITY INSTALLATION INC. (SP)	Published NOT DISCUSSED
Subcontractor -NEWMAN BACKHOE SERVICE, INC (SP)	Published NOT DISCUSSED
Subcontractor -PACIFIC SOUTHWEST STRUCTURES, INC. (SP)	Published NOT DISCUSSED
Subcontractor -WINEGARDNER MASONRY, INC. (NSP)	Not Started

Contractor Name
FAITH UTILITY INSTALLATION INC.

CSLB License Number
988105

DIR Number
PW-LR-1000572046

Overall Scope
Scope of Work.....

Crew: Exterior Installation #1 Pre-Job Conference From Information

Scope Of Work To Be Performed
Scope of Work Exterior Installation

Equipment To Be Utilized
Equipment Install Lift, other tools

DIR CLASSIFICATION	UNION	ASSIGNMENT STATUS	ASSIGNMENT ACTIVITIES	ASSIGNMENT ACTIVITIES STATUS
Drywall Installer Lather	Operating Engineers Local 17	<input type="radio"/> Final <input type="radio"/> Final Challenged <input type="radio"/> Rejected <input checked="" type="radio"/> Pending	Exterior Installation	<input type="radio"/> Accepted <input type="radio"/> Rejected <input checked="" type="radio"/> Pending

Comments 0

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**

Send Update

From: lwalden@sandi.net

Title: Outlook invite to attend Pre-Job Conf. Meeting Teams Webinar

Required

Optional

Start time: Tue 3/26/2024 1:00 PM All day Time zones

End time: Tue 3/26/2024 2:00 PM [Make Recurring](#)

Location: <https://events.teams.microsoft.com/event/8a21c921-b96e-4c9e-9e4d-962d352778a1@ab9f5dac-33ac-4f91-a9f4-8720b942f1a8>

1ST TIME ATTENDING A TEAMS WEBINAR. YOU NEED TO DOWNLOAD TEAMS APP. OR USE TEAMS WEB BROWSER. **NOTES: Teams Webinar DOES NOT HAVE A CALL IN NUMBER.**

GENERAL LINK to REGISTER in advance for this webinar (Subcontractors, Tiers & Unions):
 Webinar Date & Time: March 26, 2024 1pm
<https://events.teams.microsoft.com/event/8a21c921-b96e-4c9e-9e4d-962d352778a1@ab9f5dac-33ac-4f91-a9f4-8720b942f1a8>

Click on link to register for meeting

After registering, you will receive a confirmation email containing information about joining the webinar & reminder email with a join link will be sent 1 hr. prior to mtg. Support Specialist Loretta Walden.

Organizer: Loretta Walden
 Presenter: George Harris

- **Click on Register Icon**



SAMPLE-Pre-Job Conference III for Correia MS WSM Modernization, Lease-Leaseback (LLB) with Soltek Pacific Construction; CC23-0018-52-A1-G1



Details

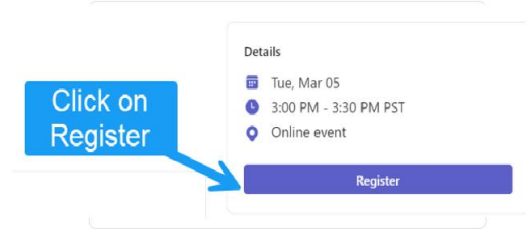
Thursday, April 24, 2024 10:30 a.m.

Co-Organizers:

George Harris III gharris@sandi.net
 Todd Ethridge tethridge1@sandi.net

Presenters:

Ivory Anderson ianderson1@sandi.net
 Edmundo Avila II eavilaii@sandi.net
 Maria Cruz mcruz5@sandi.net
 Rey Pedregon rpedregon@sandi.net
 Valerie Doering vdoering@soltekpacific.com
 Eric Harmon eharmon@soltekpacific.com
 Andrew Clevenger aclevenger@soltekpacific.com
 Carol Kim carol@sdbuildingtrades.com
 Francisco Pena fpena@swcarpenters.org



Speakers (2)

CM

Cruz Maria
 Specialist
 PSA-SDUSD

Maria Cruz is Specialist managing project and any questions on Pre-Job Forms or project, contact Maria @ mcruz5@sandi.net or mobile: 619-303-3030.

VD

Valerie Doering-Soltek
 Project Manager
 Soltek-General Contractor

Soltek is General Contractor managing project. Questions to emails to: 1. Valerie Doering vdoering@soltekpacific.com 2. Eric Harmon eharmon@soltekpacific.com 3. Andrew Clevenger aclevenger@soltekpacific.com

NEXT PAGE

- **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.***



PSA Subcontractor App Training & New Features/Updates

Thu, Oct 10, 4:00 PM - 4:30 PM PDT

Registration Information

First name * Last name *

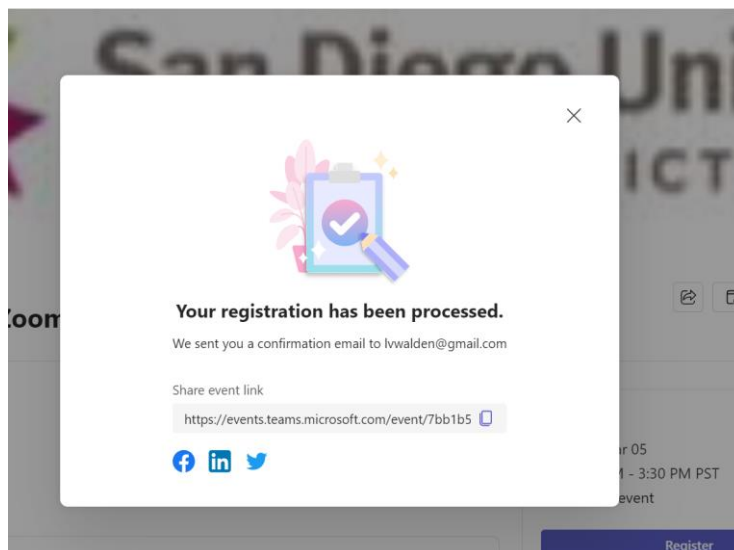
Email *

Organization *

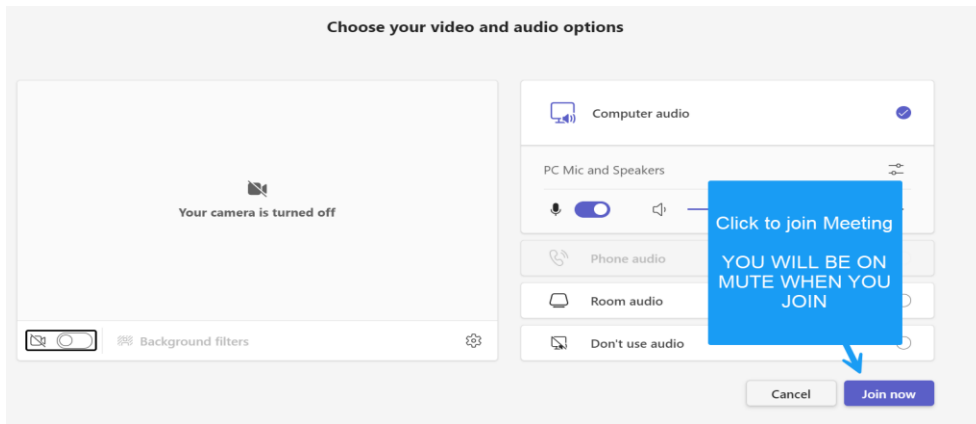
Contact Number *

I have read and agree to the [Microsoft Event Terms and Conditions](#) *

CONFIRMED REGISTRATION & can copy link to Share with other teammates or other stakeholders

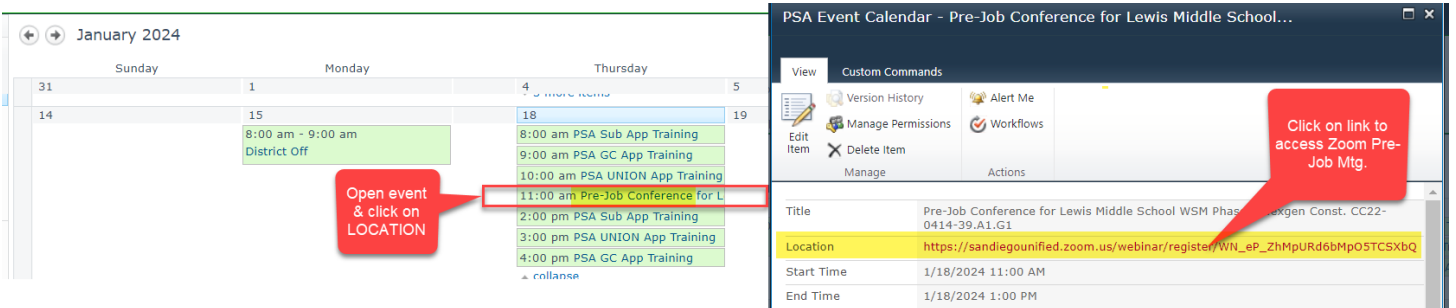


- Join Webinar with invitation or join from your Calendar. **CLICK ON JOIN NOW & OPEN INTO TEAMS MEETING**



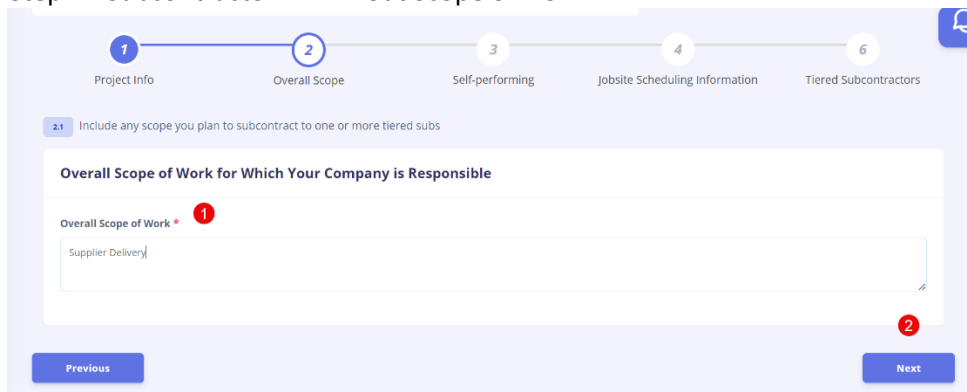
PSA EVENT CALENDAR TO ACCESS PRE-JOB MTG. GENERAL LINK -

<https://fpcprojects.sandi.net/sites/PSA/App%20Support/Lists/PSA%20Event%20Calendar/calendar.aspx>

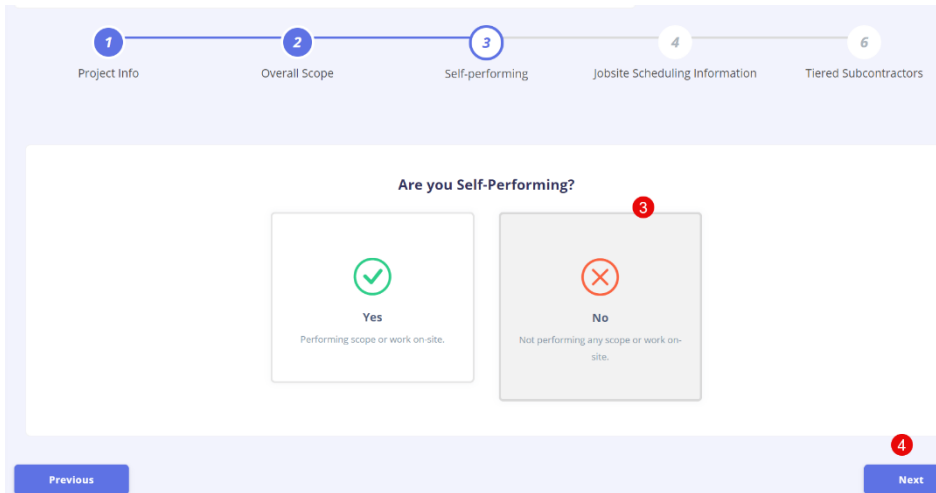


10. PRE-JOB FORM SUPPLIERS TO COMPLETE

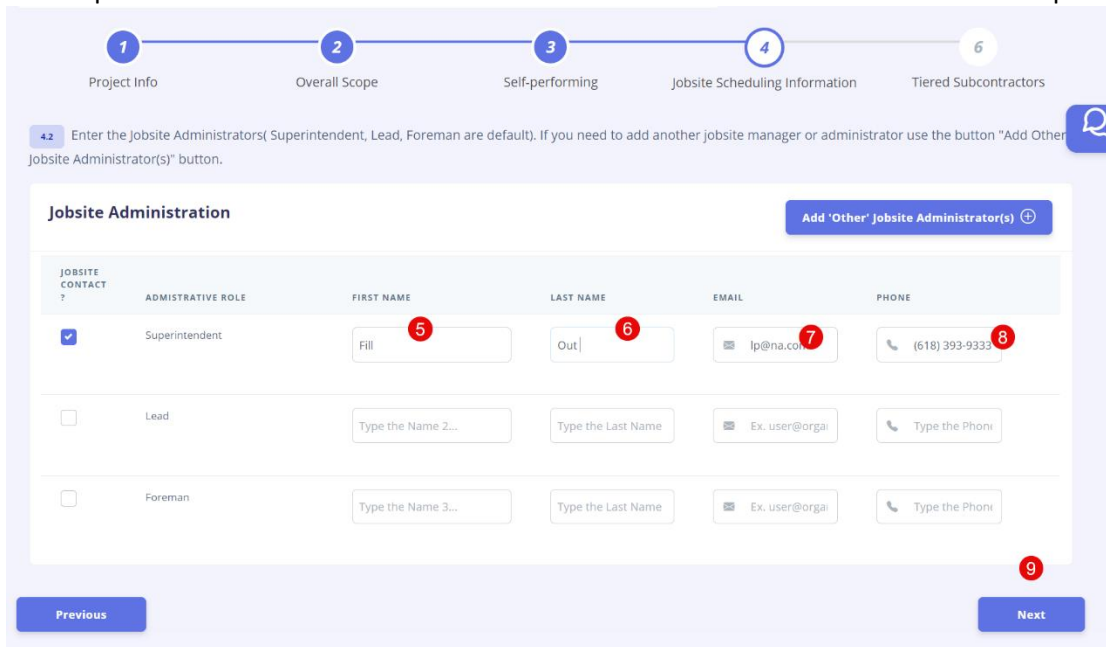
- Step 2 - Subcontractor will fill out Scope of work



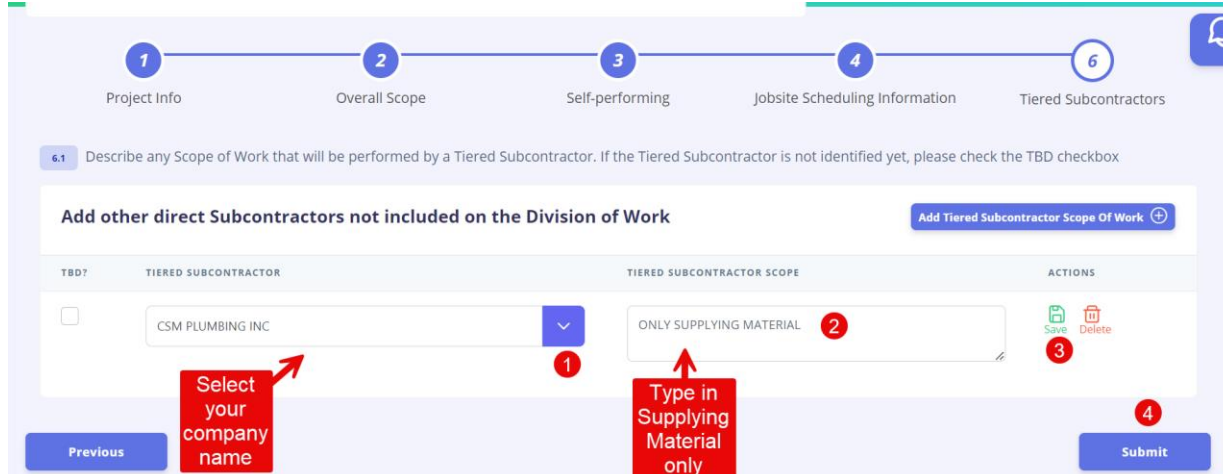
- Step 3 Not Performing



3. Step 4 – Job Site Admin Contacts – Need 1 main contact or use Add ‘Other’ to add specific title

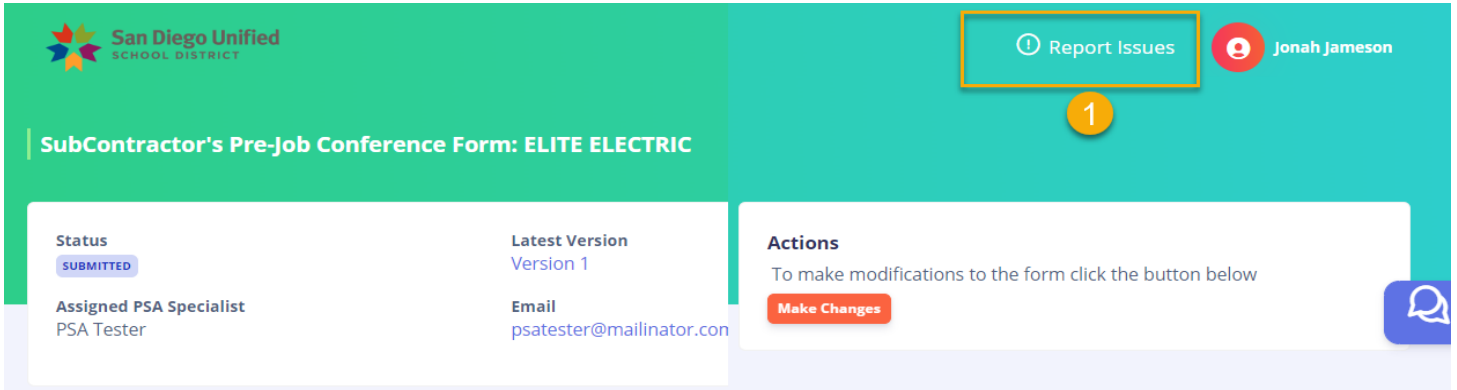


4. Step 6- Tiered Subcontractors – Use Add Tier, TBD & Scope enter SUPPLIER ONLY & SUBMIT to complete.

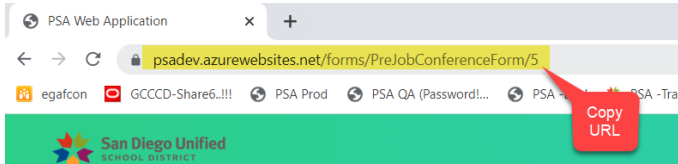


11.SUPPORT & REPORT ISSUES

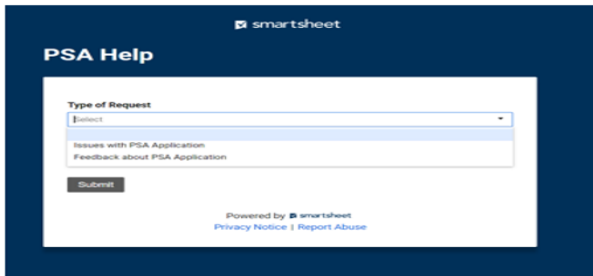
- Users can submit issues and submit support tickets from with the system



- 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**



Type of Request
 Issues with PSA Application

Date *
 Today's date.

Name *
 Your first and last name.

Email *
 Your email address. If you have an account with the PSA Application, please enter that email address.

Role *
 Please enter your role/position title and the company for which you work.

Company *
 Please list the full name of the company for which you are completing the Pre-Job Conference Form. If your company isn't listed, select "Other".

Project Information *
 Please enter the bid/contract number and bid/contract title.

URL *
 Please copy and paste the URL from the page you encountering the issue. Example: https://psa.sandi.net/forms/PreJobConferenceForm/#

Screenshot
 If you are able, please attach a screenshot of your full browser window within the application, including the error you're encountering.

Drag and drop files here or [browse files](#)

Use for Support, Issues/Errors or Feedback

Use to attach screen captures

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

The screenshot shows the San Diego Unified School District website. At the top left, there is a teal banner with 'Report Issues' and 'Help' icons, and a red callout box stating 'User Guides will be accessible from Help'. The main header features the San Diego Unified School District logo and 'PSA Home' link. Below the header is a navigation bar with links: 'PSA Home', 'RFPs', 'LED IDIQ', 'PV Specs', 'PSA FAQs', and 'Site Discretionary FAQs'. A left sidebar lists 'PSA Content' with sub-items: 'Rainbow Report', 'PSA Required Documents', 'RFPs', 'PV Specs', 'LED IDIQ', 'Site Discretionary Request User Guide', 'Vernal Pool Mitigation', and 'PSA and PWM Application Support'. A red callout box labeled 'User Guides' points to the 'PSA and PWM Application Support' link. The main content area is titled 'PSA Project Site' and contains text about a Project Stabilization Agreement.

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
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.