



U2023

PSA Online Application User Guide

General Contractors (GC)

V2 2023

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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)

OVERVIEW of RELEASE AND FUNCTIONS

Release 1

1. Business Process:

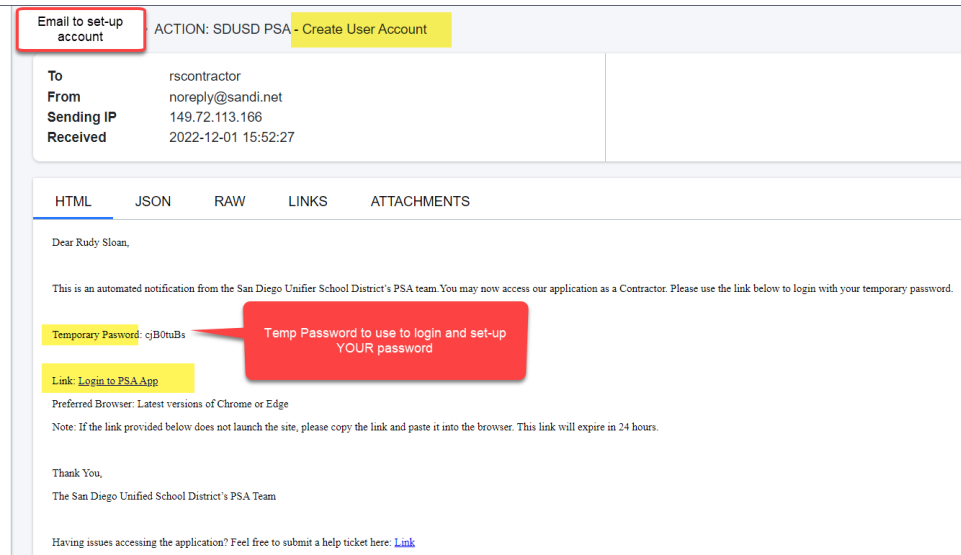
- a. Dashboard
- b. Create Pre-Job Conference Form
- c. Pre-Job Conference Meeting
- d. Support

2. Letter of Assent (LOA) - GC will be required to upload to the Cloud

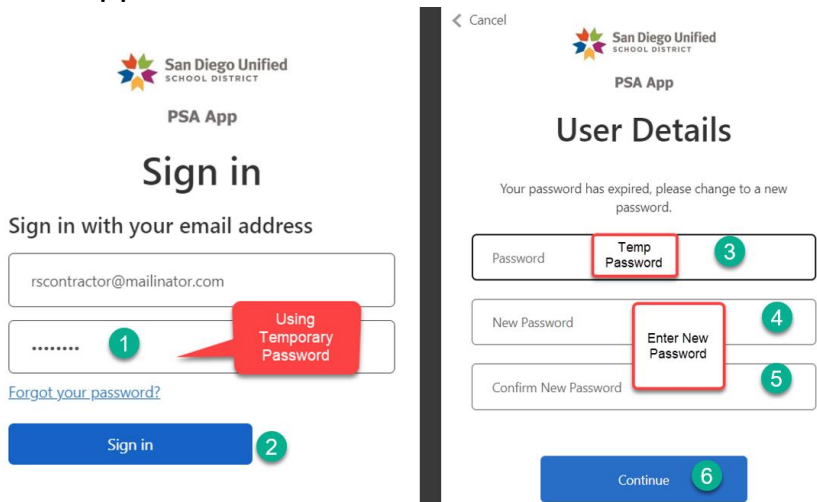
LINK TO PRODUCTION SITE: <https://psa.sandi.net>

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

San Diego Unified SCHOOL DISTRICT

Report Issues Help Straight Line

PSA Projects for STRAIGHT LINE GENERAL CONTRACTORS, INC.

+ Expand All - Collapse All

▼ C01.Train.T17 - Hoover HS CTE Classroom Remodels -SL-Train

Company	Project Role	Assigned Specialist	Pre-Job Form	Actions
STRAIGHT LINE GENERAL CONTRACTORS, INC.	General Contractor	psatester@mailinator.com	Status: Not Started Assigned to: Straight Line Email: sline@mailinator.com	Complete Form
CSM Plumbing Inc	Subcontractor	--	Status: Not Started Assigned to: Jim Rice Email: csm@mailinator.com	View Form
BAKER ELECTRIC, INC	Subcontractor	--	Status: Published Assigned to: Baker Electric Email: baker@mailinator.com	View Form

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**

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

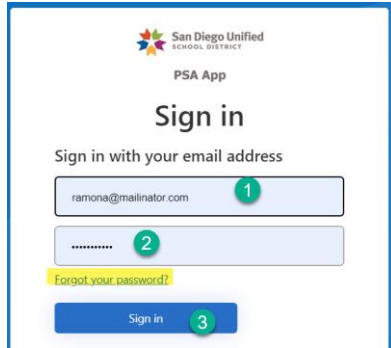
NOTE: NEW PROJECTS & 1ST MEETING FOR CONSTRUCTION WILL REQUIRE YOU TO USE THE APPLICATION

*Preparing & gathering the DETAILED information required is the MOST TIME CONSUMING, entering info. in App is quick

ONGOING PROJECTS WILL BE PDF FORMS SUBMITTED "BUSINESS AS USUAL". SEND TO YOUR SUBCONTRACTOR & GENERAL CONTRACTOR WILL UPLOAD TO CLOUD

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

Sign in Screen – Email & Password. If you **forgot password**, use link below to reset & resend Temp Password



4. CONTRACTOR DASHBOARD

Dashboard display of information:

- a. Role – General Contractor, Subcontractor or Tier Subcontractor
- b. Assigned Specialist Email
- c. Pre-Job Form Status
 - Not Started-no activity entered into form
 - Draft (In Progress) – currently being updated by “YOU GC “or Returned by Specialist
 - Submitted – sent to Specialist for review
 - i. **Revise & Resubmit** - if Specialist returns to Subcontractor
 - Published – Specialist accepted & will review in Pre-Job Meeting
 - Final Published – accepted/completed for record
- d. PreJob Form Assigned To: & Email from Company to complete form
- e. Actions: Red - Complete Form & Blue – No Action, View Form
- f. Collapse & Expand to view all projects
 - View General Contractor, Subcontractors & Tiered Subcontractors forms (see all forms for project)

Company	Project Role	Assigned Specialist	Pre-Job Form	Actions
STRAIGHT LINE GENERAL CONTRACTORS, INC.	General Contractor	psatester@mailinator.com	Status: Not Started Assigned to: Straight Line Email: sline@mailinator.com	Red - Requires Action Complete Form
CSM Plumbing Inc	Subcontractor	--	Status: Not Started Assigned to: Jim Rice Email: csm@mailinator.com	Blue - No Action View Form
BAKER ELECTRIC, INC	Subcontractor	--	Status: Published Assigned to: Baker Electric Email: baker@mailinator.com	View Form

5. PRE-JOB CONFERENCE FORM STEPS

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

San Diego Unified
KUMON DISTRICT

Report Issues Help Rudy Sloan

Assigned PSA Specialist: PSA Tester
Email: psatester@mailinator.com
Phone Number: 212-555-1212
Need Help?

1 Project Info 2 Contract Summary 3 Jobsite Information 4 Self-performing 5 Jobsite Scheduling/Administration

1.1 Review the Project, Pre-Award, & Contract information below. Click the "Next" button if the information below is accurate. If not accurate, contact the assigned PSA Specialist to report inaccuracy, and delay completing this Pre-Job Conference Form until notified that the reported issue has been resolved.

General Contractor's Information			Pre-Award & Contract Information		
Contractor Name "RUDOLPH AND SLETTEN, INC."	Contractor License Classification B - GENERAL BUILDING		Bid Number CZ-22-CMGCTrain-01	Bid Title PSA App CMGC Train-01	Prevailing Wage Determination 2022.02
Company Address "2 CIRCLE STAR WAY, 4TH FLOOR" SAN CARLOS, CA 94070	Phone Number	Fax Number	Contract Number	Contract Title	Contract Amount
CSLB License Number 198069	DIR Number 1000000658				

Previous Next

Select Next if all data is correct

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.**

1 Project Info 2 Contract Summary 3 Jobsite Information 4 Self-performing 5 Jobsite Scheduling/Administration

2.1 In the section below provide descriptive and accurate details about the Contract.

Contract Summary

Estimated Construction Start Date* 1
01/10/2023
If this contract has multiple construction start dates, enter the earliest estimated date

Estimated Construction End Date* 2
01/10/2024
If this contract has multiple construction end dates, enter the latest estimated date

Contract Summary* 3
Modernization of CDC Center & Technology

Previous Next

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

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

1 Project Info 2 Contract Summary 3 Jobsite Information 4 Self-performing 5 Jobsite Scheduling/Administration 6 Crews and Assignments

5.1 Enter the Jobsite Scheduling

Jobsite Scheduling Information

Number of Shifts* 1

Shift Description* Shift 1 6:30 am to 3:30 pm

Pay Day* Friday

Pay Period End Day* Sunday

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

5.2 Enter the Jobsite Administrators. If there are additional Jobsite administrator roles, click the “Add ‘Other’ Jobsite Administrator(s)” button”. Indicate the role that is the site contact by selecting the Jobsite Contact checkbox. At least one role must be selected as the Jobsite Contact.

Jobsite Administration Add ‘Other’ Jobsite Administrator(s)

JOBSITE CONTACT ?	ADMINISTRATIVE ROLE	FIRST NAME	LAST NAME	EMAIL	PHONE
<input checked="" type="checkbox"/>	Project Manager	Rudy	Sloan	rs@na.com	(858) 333-2224
<input checked="" type="checkbox"/>	Superintendent	Mike	Smith	ms@na.com	(858) 332-3234
<input type="checkbox"/>	Safety Rep	Type the Name 3...	Type the Last Name 3...	Ex. user@organization.com	Type the Phone Number 3...
<input type="checkbox"/>	Document Control	Type the Name 4...	Type the Last Name 4...	Ex. user@organization.com	Type the Phone Number 4...

Previous Next

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

- **Click Add Crew+**

1 Project Info 2 Contract Summary 3 Jobsite Information 4 Self-performing 5 Jobsite Scheduling/Administration 6 Crews and Assignments

6.1 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 Submit

- 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

1 Project Info 2 Contract Summary 3 Jobsite Information 4 Self-performing 5 Jobsite Scheduling/Administration 6 Crews and Assignments

6.1 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: Demo #1

Scope of Work your firm will perform on this project* Demo of temp portables

Equipment to be utilized in performing work on this Project* Hand tools

Save Delete

• **Add Assignments+**

- **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**
- **Activities / Responsibilities**
- **Date – start & end**
- **Estimated Works Average & Peak & SAVE. Add another Crew or SUBMIT**
- **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	CREW MEMBER ACTIVITIES/RESPONSIBILITIES	SUMMARY OF WORK STATUS	ESTIMATED START DATE	ESTIMATED END DATE	ESTIMATED WORKFORCE AVERAGE	ESTIMATED WORKFORCE PEAK	ACTIONS
- Operator	--	All equipment work, including rough grading and minor excavation.	--	03/06/2023	03/10/2023	3	6	Edit Delete
- Laborer	--	Set up: stabilizers, prefabbed decks and stairs, any hand grading.	--	03/20/2023	03/24/2023	2	5	Save Edit Delete
Painters Local 1399 -- Industrial Painter	--	Application of anti-slip paint application to decks and stairs	--	03/27/2023	03/31/2023	2	2	Save Edit Delete

1 Type Union number

2

3

4

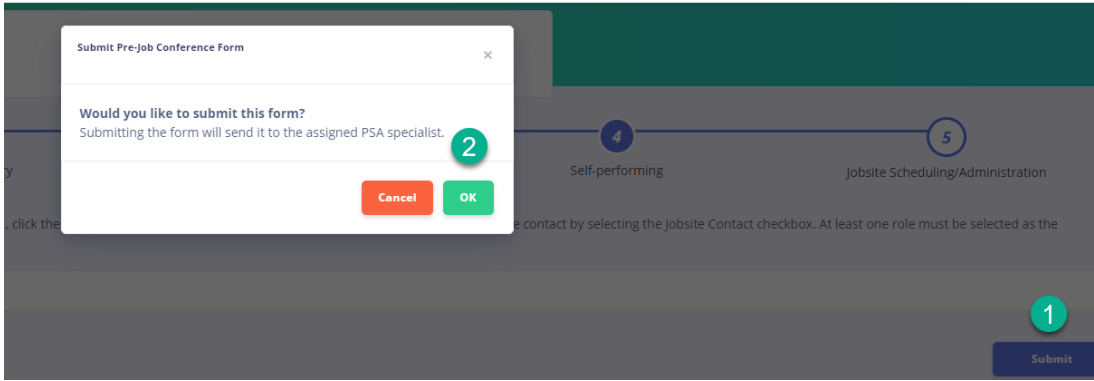
Save

Add crew (+)

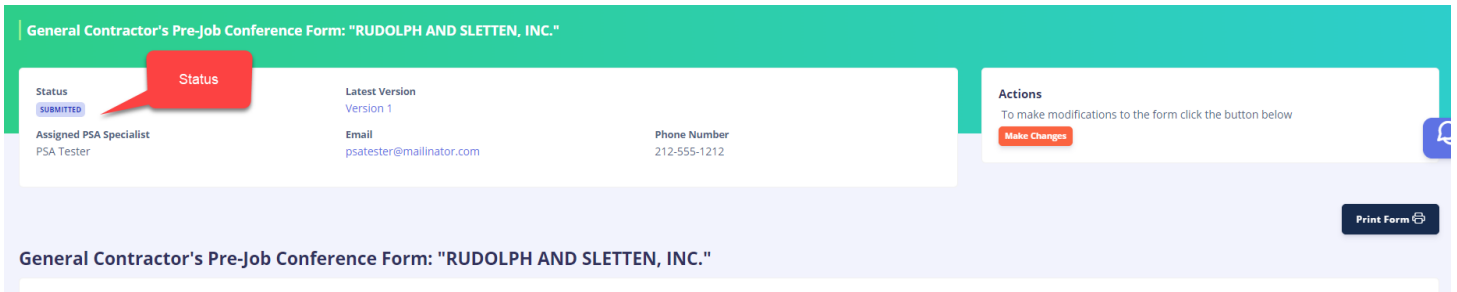
Use to add another crew if required

SDUSD PSA Signatory Building and Construction Local Unions	
<ul style="list-style-type: none"> • Boilermakers Local 92 • Bricklayers & Allied Craftsmen Local 4 • Cement Masons Local 500/Area 744 • Floor Covers Local 1399 • Glaziers Local 1399 • IBEW - Electrical Workers Local 669 • Insulators & Allied Trades (Heat & Frost) Local 5 • International Union of Elevator Constructors Local 18 • Iron Workers Local 229 • Laborers Local 89 • Laborers Local Environmental Workers Local 300 • Laborers International Union Highway & Street Stripers' LU 1184 • Millwrights & Machine Erectors Local 1607 • Pile Drivers Local 2375 • Operating Engineers Local 12 	<ul style="list-style-type: none"> • Painter & Allied Trades DC 36 • Paint & Tapers Local 1399 • Plasterers Local 200 • Plaster Tenders of So Cal Local 1414 • Plumbers & Steamfitters UA Local 230 • Road Sprinkler Fitters Local 669 • Roofers & Water Proofers Local 45 • So Cal Drywall Finishers Local 1136 • Southwest Regional Council of Carpenters Local 619 • Sheet Metal Workers Local 205 • Steamfitters & Pipefitters Local 250 • Teamsters Local 166 • Tile/Marble/Terrazzo Local 18 • Tradeshow and Sign Craft Local 831 • UA Plumbers Local 345: Landscape, Irrigation, Underground and Specialty Piping Applications

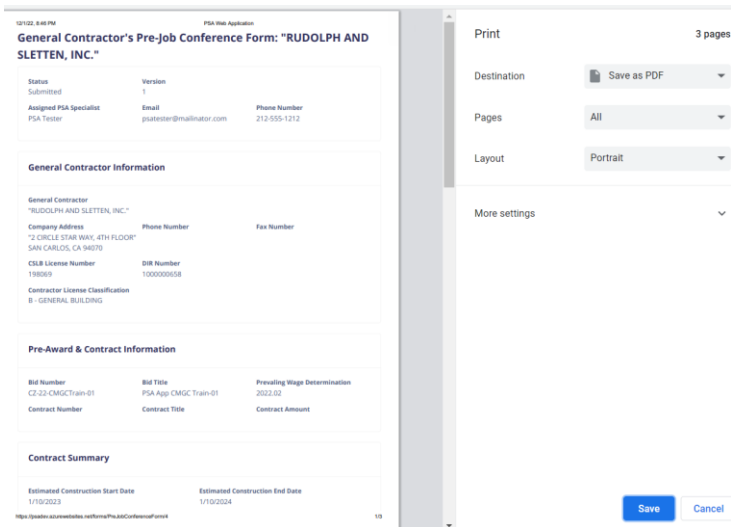
SUBMIT – Would like to submit form? Cancel to go to previous or OK to notify Specialist



VIEW OF SUBMITTED FORM & PRINT FORM



Print View



NEW PROJECTS & 1ST MEETING FOR CONSTRUCTION WILL REQUIRE YOU TO USE THE APPLICATION

ONGOING PROJECTS WILL BE PDF FORMS SUBMITTED “BUSINESS AS USUAL”. SEND TO YOUR SUBCONTRACTOR & GENERAL CONTRACTOR WILL UPLOAD TO CLOUD

6. 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.*

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

Status: SUBMITTED

Latest Version: Version 1

Assigned PSA Specialist: PSA Tester

Email: psatester@mailinator.com

Phone Number: 212-555-1212

Actions: To make modifications to the form click the button below. **Make Changes**

Select to request Specialist to return to CM/GC

Print Form

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

Modify the Form

Message to send to the PSA Specialist *

Need to document control assigned to project 1

Please write a descriptive message that will let the PSA Specialist know why you need to make modifications to the form.

2

Yes Cancel

7. ACCESSING DASHBOARD

- From Pre-Job Form Display, click on **“San Diego Unified”** icon

San Diego Unified SCHOOL DISTRICT

Assigned PSA Specialist: PSA Tester

Email: psatester@mailinator.com

Phone Number: 212-555-1212

Use to Navigate Back to Dashboard

1 Project Info

2 Contract Summary

3 Jobsite Information

- Dashboard View – Draft will be the status, Specialist returned & in GC court

San Diego Unified SCHOOL DISTRICT

Report Issues Help Rudy Sloan

Contractor Dashboard

Pre-Job Conference Forms Assigned to Me

TYPE	PRE-AWARD ACTIVITY	CONTRACT	LOA?	FORM STATUS	
General Contractor	CZ-22-CMGCTrain-01 - PSA-App CMGC Train-01	--	YES	Draft	Complete Form

Status when form is returned prior to Publishing

- **Submitted form pending Specialist Review for Publishing for Pre-Job Meeting**

Contractor Dashboard

Pre-Job Conference Forms Assigned to Me

TYPE	PRE-AWARD ACTIVITY	CONTRACT	LOA?	FORM STATUS	
General Contractor	CZ-22-CMGCTrain-01 - PSA App CMGC Train-01	--	YES	Submitted	View Form

Submitted to Specialist for Publishing

- **Published Specialist Review for Publishing for Pre-Job Meeting**

Contractor Dashboard

Pre-Job Conference Forms Assigned to Me

TYPE	PRE-AWARD ACTIVITY	CONTRACT	LOA?	FORM STATUS	
General Contractor	CZ-22-CMGCTrain-01 - PSA App CMGC Train-01	--	YES	Published	View Form

Specialist accepted & published for Meeting

- **Final Published assigned after Pre-Job Mtg. of scope & assignments accepted**

Pre-Job Conference Forms Assigned to Me

TYPE	PRE-AWARD ACTIVITY	CONTRACT	LOA?	FORM STATUS	
Subcontractor	CZ-22-CMGC-SUB Train 12-06-2022 - CZ-22-CMGC-SUB Train 12-06-2022	CZ-22-CMGC-SUB Train 12-06-2022 - CZ-22-Train 12-06-2022 Euclid CDC	YES	Final Published	View Form

Published after meeting

8. PRE-JOB MEETING

- Meeting will start with the Specialist introducing the meeting. The 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

Pre-Job Conference Meeting

Close Meeting
Print

Meeting Details

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

Project Information

Assigned PSA Specialist:PSA Tester

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

Contractor List Expand All Collapse All

CONTRACTOR TYPE	CONTRACTOR NAME	LOA RECEIVED	PRE-JOB FORM STATUS	ACTIONS
General Contractor	STRAIGHT LINE GENERAL CONTRACTORS, INC.	NO	Published	

Contractor Name STRAIGHT LINE GENERAL CONTRACTORS, INC.	CSLB License Number 760964	DIR Number 1000002142
Contract Summary Whole Site Modernization included upgrading Field & Track, HVAC units, adding 4 level Parking garage, Temp Swing Space with Nursing Station & New Administration Building		

Comments 0

Add comment

No Comments...

VIEW A SUBCONTRACTOR

Crew: Installation of trailers

Scope Of Work To Be Performed 1

Rough grade laydown are for trailer, assisting with off-loading trailers, set up and adjustment of under trailer stabilizers, installation of prefab'ed decks and stairs, safety anti-slip paint application to decks and stairs.

Equipment To Be Utilized 2

Bob Cat, Grader, Hand and power tools

DIR CLASSIFICATION 3	UNION	ASSIGNMENT STATUS 1	SUMMARY OF WORK	SUMMARY OF WORK STATUS	
Operator	Operating Engineers Local 12	Pending	All equipment work, including rough grading and minor excavation	Pending	⋮
Laborer	Laborers Local 89	Pending	Set up: stabilizers, prefab'ed decks and stairs, any hand grading	Pending	⋮
Industrial Painter	Painters Local 1399	Pending	Application of anti-slip paint application to decks and stairs	Pending	⋮

Pre-Job Tiered Scopes 4

TBD	TIERED SUB NAME	SCOPE OF WORK
NO	--	Hooking up temp power to trailers
NO	--	Hooking up water and sewer to trailers

Crew: Crew 1

Scope Of Work To Be Performed

Trenching, Excavation, and Installation of Site Utilities (Storm Drain, Sewer, Fire Water and Drain Water)

Equipment To Be Utilized

Backhoe Excavator Loader Skidsteer Wacker

DIR CLASSIFICATION	UNION	ASSIGNMENT STATUS 1	SUMMARY OF WORK	SUMMARY OF WORK STATUS	
Tradesman	Plumbers & Steamfitters Local 230	Rejected	Site Utilities		⋮

Assignment Status	Summary of Work Status
Final	Accepted
Final Challenged	Rejected
Rejected	

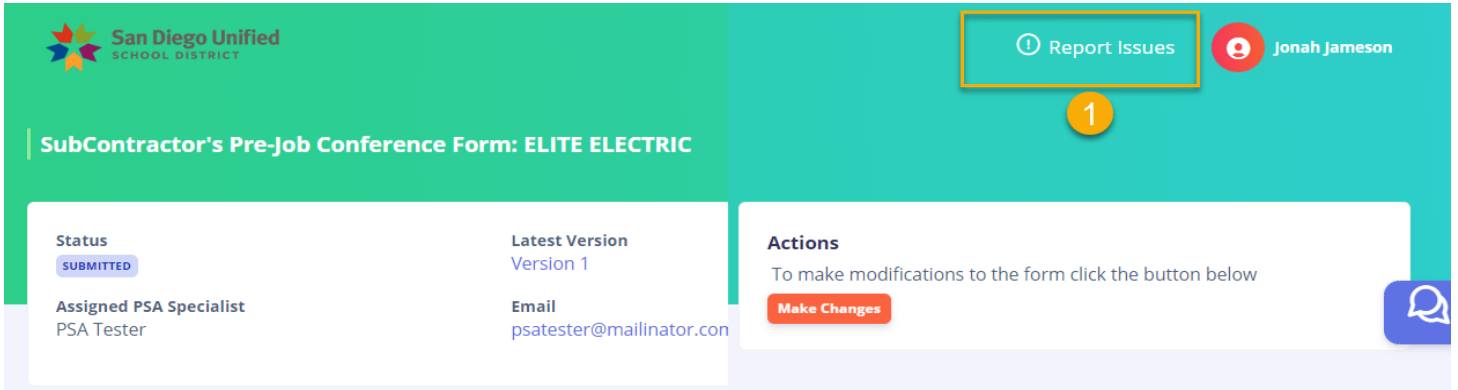
Assigned when Union(s) accept work or form needs to be revised

Pre-Job Tiered Scopes

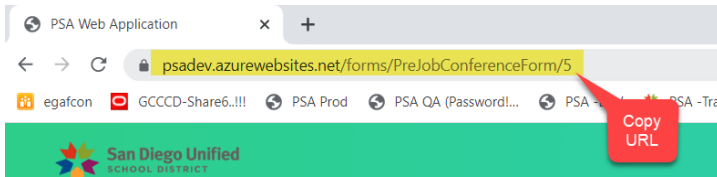
TBD	TIERED SUB NAME	SCOPE OF WORK
NO	MATT CHLOR, INC.	Water Chlorination
NO	SOLID STRUCTURES, INC.	Storm Drain Manholes

9. SUPPORT & REPORT ISSUES

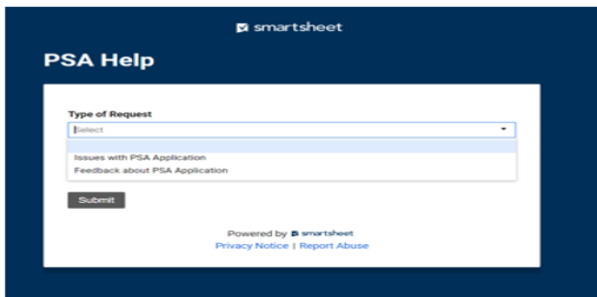
- Users can submit issues and submit support tickets from with the system



- 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

Report Issues Help

User Guides will be accessible from Help



San Diego Unified
SCHOOL DISTRICT

PSA Home

PSA Home RFPs LED IDIQ PV Specs PSA FAQs Site Discretionary FAQs

PSA Content

- Rainbow Report
- PSA Required Documents
- RFPs
- PV Specs
- LED IDIQ
- Site Discretionary Request User Guide
- Vernal Pool Mitigation
- PSA and PWM Application Support

PSA Project Site

A Project Stabilization Agreement District (SDUSD), San Diego Building & Carpenters. It establishes a standard for standards for hiring, dispute resolution other things. These basic standards co

User Guides

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.