

Appia

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

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Table of Contents

1 -	Basic Navigation	6
2 -	Accessing Your Project	8
A.	Project Listing	9
B.	Project Overview Page	10
3 -	Integrating Appia with Doc Express for Submittals	11
4 -	Reports	18
5 -	Daily Reports and Postings	21
A.	Overview Tab	25
B.	Personnel Tab	27
C.	Equipment Tab	31
D.	Item Postings Tab	36
E.	Attachments Tab	47
F.	Submitting Daily Reports for Approval & Reviewing Materials	51
G.	Limiting Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages	55
H.	Additional “Daily Activities” Information	61
I.	Un-approving a Daily Report	65
6 -	Items	66
7 -	Materials	74
A.	Releasing Previously Limited Payment on Items for Certifications, Payroll, and Anticipated Liquidated Damages	75
B.	Reserved for Future Use	81
8 -	Stockpiles	82
A.	Adding a Stockpile Item	83

B.	Editing an Existing Stockpile.....	94
9 -	Time Limits.....	104
A.	Entering Time Charges.....	108
B.	Generating a Time Limit Report (Weekly Working Day Report).....	119
10 -	Change Orders.....	123
A.	General Change Order Information.....	125
B.	Change Order Descriptive Information Screen (Initial Creation) / Overview Tab (Edit Mode).....	127
C.	Creating an Auto-Populated Balancing Change Order Using a Standard Change Order.....	132
D.	Numerical Values Change Order Entry Screen.....	134
1)	Quantity Changes / Quantities Tab (Edit Mode).....	135
2)	New Items / New Items (Edit Mode).....	144
3)	Time Limit Changes / Time Limit Changes (Edit Mode).....	156
4)	New Time Limits / New Time Limits (Edit Mode).....	160
5)	Attachments / Attachments (Edit Mode).....	165
E.	Producing a PDF of the Change Order.....	173
F.	Approval Process for Change Orders.....	178
1)	Submitting Change Orders for Approval NOT Using the Doc Express Integration.....	179
2)	Submitting Change Orders for Approval Using the Doc Express Integration.....	183
11 -	Punch List.....	195
12 -	Payments.....	197
A.	Overview Tab.....	200
B.	Exclusions of Daily Reports from Payments.....	202
C.	Summary Tab.....	204
D.	Work Performed Tab.....	205
E.	Stockpiles Tab.....	207

F.	Attachments Tab.....	208
G.	Approving & Submitting a Payment – FOR CITY, COUNTY NON-FM, & COUNTY FM PROJECTS LET PRIOR TO JANUARY 2024	209
1)	Submitting Payments for Approval	210
2)	Uploading Payment to Doc Express for Signatures.....	211
3)	Making a Progress Payment.....	211
4)	Making a Final Payment.....	213
H.	Approving & Submitting an Automated Payment – FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY	214
1)	Submitting Payments for Approval	215
2)	Making a Final Payment.....	232
I.	Early or Partial Retainage Release	234
J.	Final Payment.....	236
1)	Standard Payment for Final Payment	238
2)	Appia’s Final Payment Process – Including Balancing Change Order	240
3)	Appia’s Final Payment Process – Without Balancing Change Order	261
4)	Troubleshooting Common Final Payment Issues.....	276
K.	Editing a Payment	278
L.	Generating a Payment Report (Payment).....	282
13 -	Contractors	287
14 -	Funding	289
15 -	More: Adjustments	293
16 -	More: Worksheets	295
17 -	More: Project Settings	297
18 -	Exporting Data: Export Reports (For Audit/Review by Local Systems).....	300
19 -	EZ Forms Exports.....	313
A.	EZ Forms (E-Sheets)	314

B.	Materials 101 EZ Form	322
20 -	Help Section & Local Systems Contact Information for Questions and Assistance	329

1 - Basic Navigation

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

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

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

The screenshot shows the Appia software interface. On the left is a dark navigation menu with icons for 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', and 'EXPORT DATA'. The top of the interface has a blue status bar with text about the current business account. Below this is a 'My Projects' section with a search bar and buttons for 'Create Project' and 'Import Project'. A 'Status' filter is set to 'Favorites'. The main area displays a table of project favorites.

Project ID	Description	Project Status
★ 01-C001-116 Imported	WORKDAY TEST_FM-C001(116)--55-01, AcctID- 37895, FM-C001(116)--55-01, AcctID- 37896, Letting date- 17 Aug 2021	Construction [Archive]
★ 01-C001-121 Imported	FM-C001(121)--55-01, Acct ID- 39562, Letting Date- July 18, 2023	Construction [Archive]
★ 04-C004-116 Imported	FM-C004(116)--55-04, Acct ID- 38373, Letting Date- February 15, 2022	Construction [Archive]
★ 09-C009-088 Imported	TEST FOR WORKDAY_Construction NTP date_BROS-SWAP-C009(88)--FE-09, AcctID- 37865, Letting Date- 20 July 2021	Construction [Archive]
★ 15-C015-072 Imported	BROS-SWAP-C015(72)--FE-15, AcctID- 37709, Letting Date- 20 April 2021	Construction [Archive]

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

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

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

2 - Accessing Your Project

A. Project Listing

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

The screenshot displays the 'My Projects' interface. On the left is a dark sidebar with navigation icons for 'MY PROJECTS', 'REFERENCE DATA', 'SYSTEM MGT', and 'EXPORT DATA'. The main content area is titled 'My Projects' and includes a search bar 'Find Project', a status filter 'Under Construction', and an 'Advanced' filter icon. Below this is a table of projects under construction. The table has two columns: 'Project ID' and 'Description'. The project '86-C086-060 - 31961' is circled in green. At the bottom right of the table is a 'Help' button.

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

B. Project Overview Page

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

The screenshot displays the 'Overview' page for project 75-C075-166. The interface includes a sidebar with navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area shows the project name '75-C075-166' with a status 'Under Construction'. Below this, the project details are organized into sections: General Information, Location, and Management. The General Information section includes the Work Type 'PCC PAVEMENT WIDENING / PCC RESURFACING'. The Location section describes the project site as 'On K 49, from C38 N 1 miles to 231 ft. north of 200th St.; In the city of Le Mars, on K49 from 18th Street SE south to 774 ft. south of 200th St.'. The Management section lists the Prime Contractor as 'GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.' and includes a 'Created By' field. On the right side, there are summary cards for 'Awarded Amount' (\$2,482,485.15), 'Authorized Amount' (\$2,482,485.15), and 'Approved Changes' (\$0.00). Below these, a 'Description' card provides a detailed project description. At the bottom right, an 'Amount Paid' section shows progress indicators for 'Amount paid so far' (0% of your Awarded), 'Authorized' (0% of your Authorized), and 'Authorized' (0% of your Authorized).

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Projects / 75-C075-166

75-C075-166 Under Construction

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

Overview Edit

General Information

▼ Project

Work Type
PCC PAVEMENT WIDENING / PCC RESURFACING

▼ Location

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

▼ Management

Prime Contractor
GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.

Created By

Awarded Amount \$
\$2,482,485.15

Authorized Amount ✓
\$2,482,485.15

Approved Changes ↗
\$0.00

Description

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

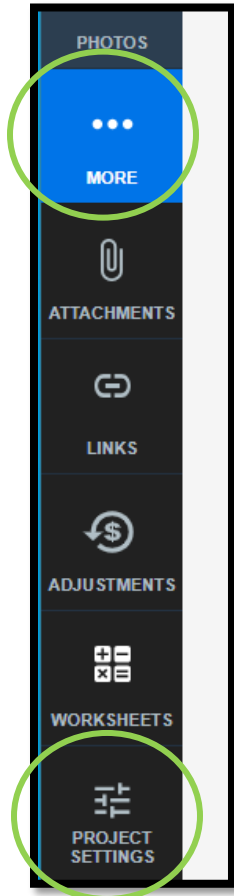
Amount Paid

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

3 - Integrating Appia with Doc Express for Submittals

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

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



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

The screenshot shows the 'Project Settings' window for project '17-C017-035', which is marked as 'Under Construction'. The breadcrumb trail is 'Projects / 17-C017-035 / Settings'. The project details include 'BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024'. A horizontal tab bar at the top contains 'GENERAL', 'CONSTRUCTION', 'CUSTOM FIELDS', 'INTEGRATIONS' (highlighted with a green circle), 'PROJECT SECURITY', and 'CONTRACTOR ACCESS' (marked as BETA). The 'Project Settings' form includes a 'Report Display Name' text field with a note: 'Name to use in place of the agency name on PDF reports. If left blank, the agency name will be used.' Below this is the 'Report Logo Preference' section with three radio buttons: 'Do not display a logo', 'Display the Appia product logo', and 'Display your organization's logo' (which is selected). To the right, the 'Report Logo' section features a 'Choose File' button and the text 'No file chosen', with a preview of the 'IOWA DOT' logo below.

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

The screenshot shows the 'Project Settings' page for project '15-C015-065' in the 'Integrations' tab. The left sidebar contains navigation links: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, and MATERIALS. The main content area has a breadcrumb trail 'Projects / 15-C015-065 / Settings' and a status 'Under Construction'. Below the project name, it lists 'BRS-SWAP-C015(65)–FF-15, Acct ID: 36986, Letting Date: July 21, 2020'. The 'Integrations' tab is selected, showing a 'Doc Express® Integration' box. This box contains instructions to send Appia reports to Doc Express and establish links with existing documents, and a note to ensure users have access to the appropriate Doc Express contract and drawers. At the bottom of the box is a blue button labeled 'Enable Integration', which is circled in green.

Projects / 15-C015-065 / Settings

15-C015-065 Under Construction

BRS-SWAP-C015(65)–FF-15, Acct ID: 36986, Letting Date: July 21, 2020

GENERAL CONSTRUCTION CUSTOM FIELDS **INTEGRATIONS** PROJECT SECURITY

Project Settings

D Doc Express® Integration

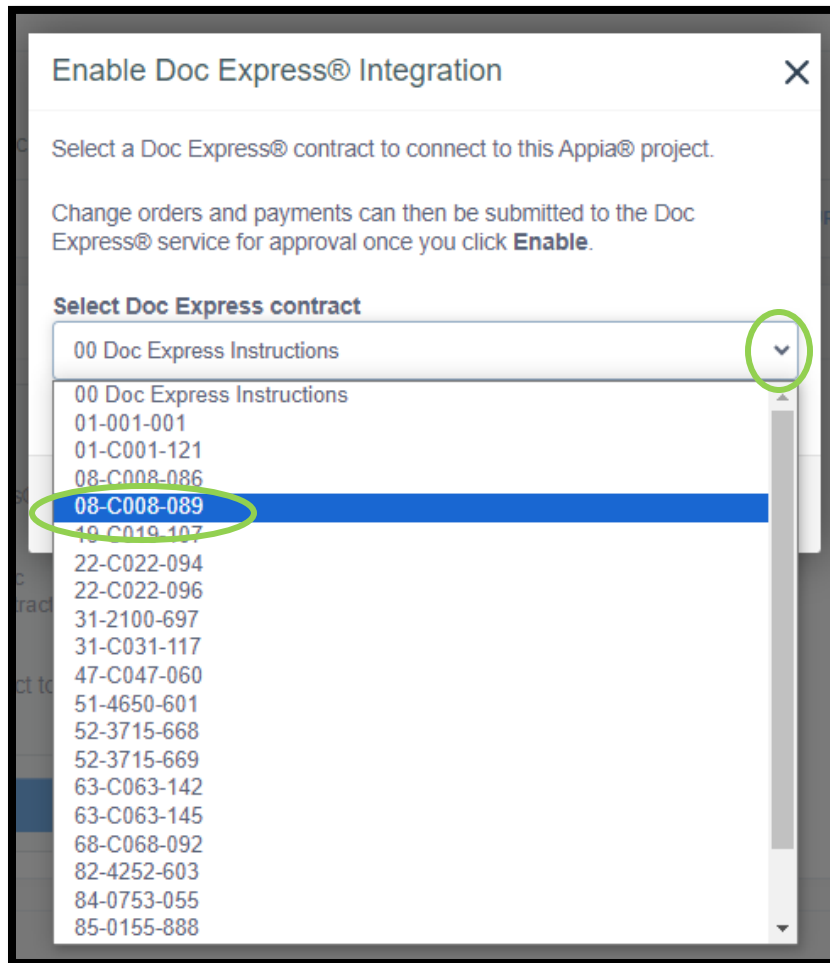
Send Appia reports to the Doc Express service and establish links with existing documents.

Make sure that users have access to the appropriate Doc Express contract and drawers.

Click **Enable Integration** to connect this Appia® project to a Doc Express® contract.

Enable Integration

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



The screenshot shows the 'Enable Doc Express® Integration' dialog box. It contains instructions to select a Doc Express contract and a list of available contracts. The contract '08-C008-089' is highlighted in blue. A green circle highlights the dropdown arrow on the right side of the list.

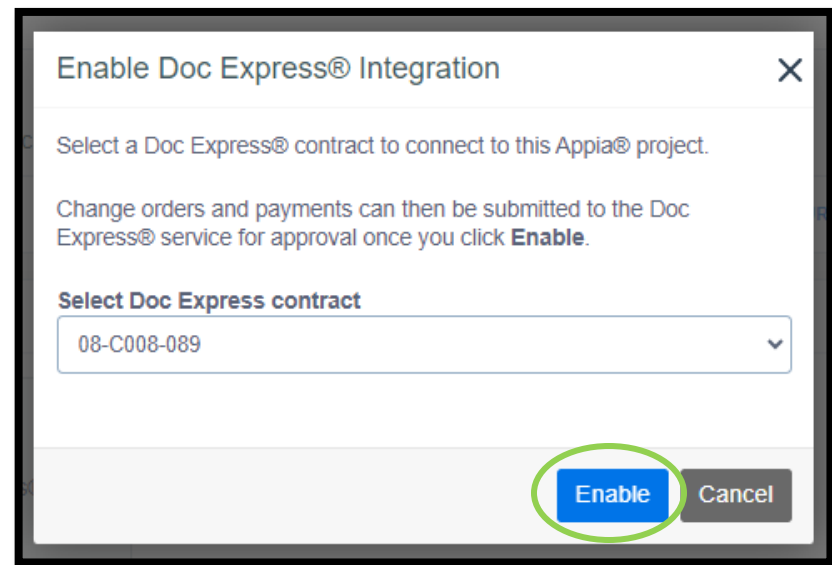
Enable Doc Express® Integration [X]

Select a Doc Express® contract to connect to this Appia® project.

Change orders and payments can then be submitted to the Doc Express® service for approval once you click **Enable**.

Select Doc Express contract

- 00 Doc Express Instructions
- 00 Doc Express Instructions
- 01-001-001
- 01-C001-121
- 08-C008-086
- 08-C008-089**
- 19-C019-107
- 22-C022-094
- 22-C022-096
- 31-2100-697
- 31-C031-117
- 47-C047-060
- 51-4650-601
- 52-3715-668
- 52-3715-669
- 63-C063-142
- 63-C063-145
- 68-C068-092
- 82-4252-603
- 84-0753-055
- 85-0155-888



The screenshot shows the 'Enable Doc Express® Integration' dialog box with the contract '08-C008-089' selected in the dropdown menu. The 'Enable' button is highlighted with a green circle.

Enable Doc Express® Integration [X]

Select a Doc Express® contract to connect to this Appia® project.

Change orders and payments can then be submitted to the Doc Express® service for approval once you click **Enable**.

Select Doc Express contract

08-C008-089

Enable Cancel

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

Projects / 17-C017-035 / Settings

17-C017-035 Under Construction

BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024

GENERAL CONSTRUCTION CUSTOM FIELDS **INTEGRATIONS** PROJECT SE

Project Settings

D Doc Express® Integration ☒ Enabled

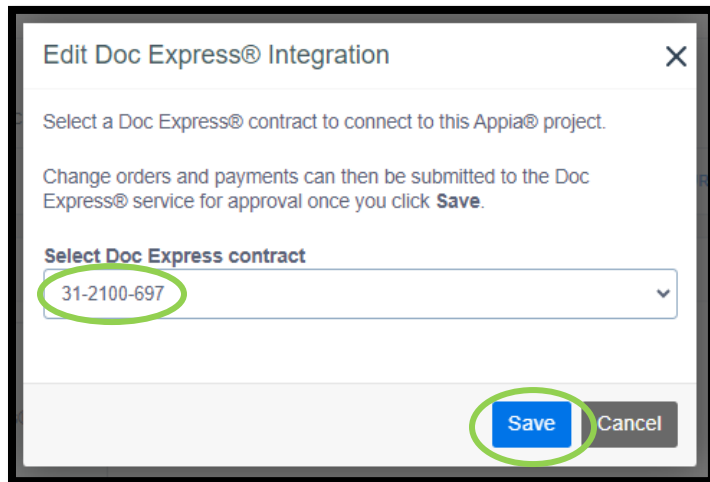
Send Appia reports to the Doc Express service and establish links with existing documents.

Make sure that users have access to the appropriate Doc Express contract and drawers.

Doc Express Contract **17-C017-035**

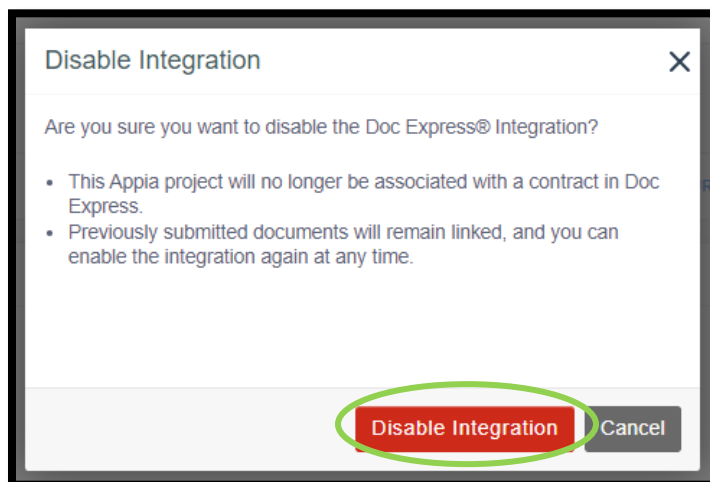
[Change Contract](#) [Disable Integration](#)

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



The screenshot shows a pop-up window titled "Edit Doc Express® Integration" with a close button (X) in the top right corner. The window contains the following text: "Select a Doc Express® contract to connect to this Appia® project." and "Change orders and payments can then be submitted to the Doc Express® service for approval once you click **Save**." Below this is a section labeled "Select Doc Express contract" with a dropdown menu showing "31-2100-697". At the bottom right, there are two buttons: a blue "Save" button and a gray "Cancel" button. Both the dropdown menu and the "Save" button are circled in green.

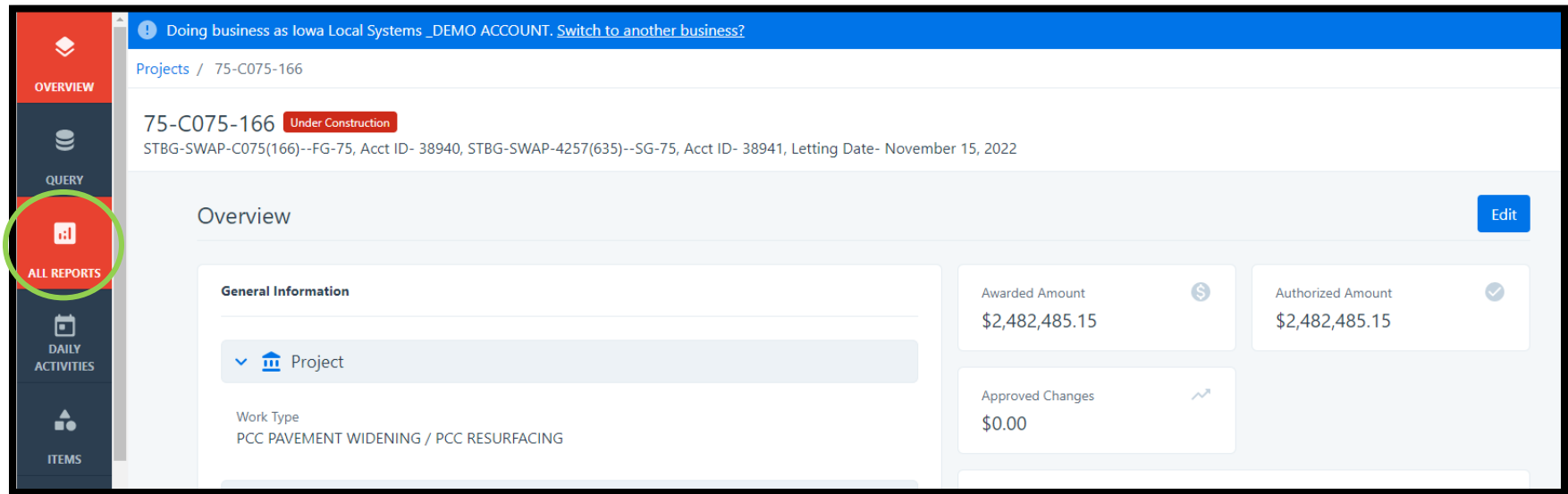
If you want to disable the Doc Express integration, click the gray “Disable Integration” button in the lower, right corner of the Doc Express® Integration box. A pop-up window will appear titled, “Disable Integration”. If you want to disconnect/disable the integration, click on the red “Disable Integration”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



The screenshot shows a pop-up window titled "Disable Integration" with a close button (X) in the top right corner. The window contains the following text: "Are you sure you want to disable the Doc Express® Integration?" and a bulleted list: "• This Appia project will no longer be associated with a contract in Doc Express." and "• Previously submitted documents will remain linked, and you can enable the integration again at any time." At the bottom right, there are two buttons: a red "Disable Integration" button and a gray "Cancel" button. The "Disable Integration" button is circled in green.

4 - Reports

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



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

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

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

The screenshot displays the Appia software interface. On the left is a vertical sidebar with navigation icons and labels: OVERVIEW, QUERY, ALL REPORTS (highlighted in red), DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, and CHANGE. The main content area is titled 'Projects / 75-C075-166 / Reports'. Below this, the project name '75-C075-166' is shown with a red 'Under Construction' status tag, followed by a detailed project description: 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- Nov...'. The 'All Reports' section is divided into two categories: 'Contractors' and 'Items'. Under 'Contractors', there is a report card titled 'Items by Contractor' with the description 'Lists all the items assigned to each contractor.' Under 'Items', there are six report cards: 'Item Material Associations' (Displays all materials associated to each item in the project.), 'Item Overruns' (Lists all items with overruns.), 'Item Overruns by Fund Package' (Lists all items with overruns by fund package.), 'Items by Fund Package' (Lists all items associated with each fund package.), 'Posted Quantity' (Displays quantities posted in daily reports across a range of dates.), and 'Statement of Quantities' (Displays all items with quantities placed in daily reports.).

5 - Daily Reports and Postings

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

The screenshot displays the Appia software interface. On the left, a vertical navigation menu contains several icons and labels: 'OVERVIEW', 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES' (highlighted with a red circle), 'ITEMS', and 'MATERIALS'. The main content area is titled '75-C075-166 Under Construction' and includes a sub-header 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022'. Below this, the 'Overview' section is visible, featuring a 'General Information' tab. The 'General Information' tab shows a 'Project' section with a 'Work Type' of 'PCC PAVEMENT WIDENING / PCC RESURFACING' and a 'Location' section with a description: 'On K 49, from C38 N 1 miles to 231 ft. north of 200th St.; In the city of Le Mars, on K49 from 18th'. To the right of the 'General Information' tab, there are two summary boxes: 'Awarded Amount \$2,482,485.15' and 'Authorized Amount \$2,482,485.15'. Below these, there is a box for 'Approved Changes \$0.00'. At the bottom right, there is a 'Description' section with the text: 'STBG-SWAP-C075(166)--FG-75, Acct ID- 38940, STBG-SWAP-4257(635)--SG-75, Acct ID- 38941, Letting Date- November 15, 2022'. An 'Edit' button is located in the top right corner of the 'Overview' section.

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

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

Projects / 75-C075-166 / Daily Activities

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

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

< January >
< 2024 >

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

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

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

The screenshot displays the Appia software interface. On the left is a dark sidebar with icons and labels for various functions: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main window has a blue header bar with a warning message: "Doing business as Iowa Local Systems _DEMO ACCOUNT. Switch to another business?". Below the header, the breadcrumb trail reads "Projects / 75-C075-166 / Daily Activities / 01-03-2024". The project name "75-C075-166" is followed by a red "Under Construction" tag. A search bar labeled "Search Daily Activities" is in the top right. The section is titled "Showing Daily Activities for" with a date range of "< 01/03/2024 >". The "Daily Reports" section is currently empty, showing a placeholder with the text "No daily reports found." and a green circle highlighting a blue "Add" button in the top right corner. Below this is the "Daily Diary" section, which also has an "Add" button in the top right corner.

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

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

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

A. Overview Tab

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

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

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

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

OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

CONTRACTORS

FUNDING

...

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW

PERSONNEL

EQUIPMENT

ITEM POSTINGS

ATTACHMENTS

Edit

Save

Cancel

Report Date

06/05/2019

Prime Contractor

PETERSON CONTRACTORS INC.

Created By

Nicole Stinn

Report Status

Draft

Weather

Sunny

Temperature

Low

75

High

80

Weather Day

☐ NO

Remarks

14px

B *I* U

At 7:30am PCI continued to drive the piling for the south abutment. Piles 3 through 9 reached at least 48.0 tons of bearing that was needed. At 3:00pm PCI retapped piles 1 and 2. Pile 1 retapped at 2" with a 7' hammer drop. The 2nd piling retapped had a hammer drop of 7" and in 10 blows achieved 2". This means that both piles that were retapped passed.

The bentonite showed up at the site and PCI unloaded it and placed it into hole #5 of the north abutment. They then added water to the bentonite so that it would firm up. Later in the afternoon the rest of the holes were filled with bentonite and water pumped onto it.

GreenTech showed up to the site at 9:00am and dropped off some of their equipment. They did get most of the disturbed area cultivated with the exceptions of a couple ditch bottoms due to standing water or too muddy to get equipment in there.

Controlling Item of Work

14px

B *I* U

Piles, Steel, HP 10x57

Bid Items Affected

14px

B *I* U

Native Grass Seeding

Wetland Grass Seeding

Seeding and Fertilizing (Rural)

Stabilizing Crop - Seeding and Fertilizing

Reinforcing Steel

Help

B. Personnel Tab

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

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

The screenshot displays the Appia software interface. At the top, a green notification bar states "The daily report has been saved successfully." Below this, the breadcrumb trail reads: "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag, and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014".

The interface features a vertical sidebar on the left with icons for OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST. At the top of the main content area, there are five tabs: OVERVIEW, PERSONNEL (circled in green), EQUIPMENT, ITEM POSTINGS, and ATTACHMENTS. The PERSONNEL tab is currently selected.

The "Edit" form contains several sections:

- Report Date:** 12/19/2018
- Prime Contractor:** PETERSON CONTRACTORS INC.
- Created By:** Nicole Stinn
- Report Status:** Draft
- Weather:** A text input field.
- Temperature:** Two input fields labeled "Low" and "High".
- Weather Day:** A toggle switch currently set to "NO".
- Remarks:** A rich text editor with a toolbar (bold, italic, underline, bulleted list, numbered list, link, unlink, font color) and a text area.
- Bid Items Affected:** Another rich text editor with a similar toolbar and text area.

At the top right of the form are "Save" and "Cancel" buttons. At the bottom right is a blue "Help" button with a question mark icon.

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

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Submit For Approval

Actions

Reports

Daily Report

Edit

Report Date

12/22/2018

Report Status

Draft

Prime Contractor

PETERSON CONTRACTORS INC.

Weather Day?

No

Weather

Cloudy, Drizzle

Temperature

Low: 30° High: 39°

Created By

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

Remarks

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

Controlling Item of Work

Clearing and Grubbing

Personnel

Edit

No personnel found.

Equipment

Edit

No equipment found.

Item Postings

Edit

No items found.

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

The screenshot shows the 'Personnel' screen for project 'BROS-C086(60)--8J-86 - 31961' with status 'Under Construction'. The breadcrumb trail is 'Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-22-2018 / Daily Report / Personnel'. The left sidebar includes 'OVERVIEW', 'LABS', 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', and 'STOCKPILES'. The top navigation bar has 'OVERVIEW', 'PERSONNEL', 'EQUIPMENT', 'ITEM POSTINGS', and 'ATTACHMENTS'. The 'Personnel' section has a table with columns 'Worker' and 'Crew'. The 'Worker' column has a dropdown menu showing 'Worker Type #1'. The 'Crew' column has a dropdown menu showing 'Crew #1', a 'Contractor' dropdown showing 'PETERSON CONTRACTORS INC.', and a table with 'Number' (0) and 'Hours' (0.00). On the right side, there are four buttons: 'Save' (blue), 'Add Crew' (gray), 'Add Worker Type' (gray), and 'Cancel' (gray). The 'Save', 'Add Crew', and 'Add Worker Type' buttons are circled in green.

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

The screenshot shows the 'Personnel' screen with multiple worker entries. The 'Worker' column has dropdown menus for 'Laborer', 'Equipment Operator', and 'Worker Type #3'. The 'Crew' column has dropdown menus for 'Excavation Crew' and 'Structure Crew'. The 'Contractor' column has dropdown menus for 'PETERSON CONTRACTORS INC.'. The table has columns for 'Number' and 'Hours'. The 'Laborer' entry has 'Number' 3 and 'Hours' 30.00. The 'Equipment Operator' entry has 'Number' 2 and 'Hours' 20.00. The 'Worker Type #3' entry has 'Number' 1 and 'Hours' 10.00. The 'Structure Crew' entry has 'Number' 1 and 'Hours' 10.00. The 'Add Crew' and 'Add Worker Type' buttons are circled in green.

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

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

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Daily Report [Edit](#)

Report Date
12/22/2018

Report Status
Draft

Prime Contractor
PETERSON CONTRACTORS INC.

Weather
Cloudy, Drizzle

Weather Day?
No

Temperature
Low: 30° High: 39°

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

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

Controlling Item of Work
Clearing and Grubbing

Personnel [Edit](#)

Excavation Crew – PETERSON CONTRACTORS INC.

Laborer	3	30.00 hours
Equipment Operator	2	20.00 hours
Worker Type #3	1	10.00 hours

Structure Crew – PETERSON CONTRACTORS INC.

Laborer	1	10.00 hours
Equipment Operator	1	10.00 hours

Displaying all 2 crews

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

C. Equipment Tab

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

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

The screenshot displays the Appia software interface. At the top, a green banner indicates "The daily report has been saved successfully." Below this, the breadcrumb trail reads: "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag, and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014".

The left sidebar contains a vertical menu with icons and labels: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST.

The top navigation bar includes tabs: OVERVIEW, PERSONNEL, EQUIPMENT (circled in green), ITEM POSTINGS, and ATTACHMENTS. The EQUIPMENT tab is the active tab.

The main content area is titled "Edit" and contains the following fields:

- Report Date:** 12/19/2018
- Prime Contractor:** PETERSON CONTRACTORS INC.
- Created By:** Nicole Stinn
- Report Status:** Draft
- Weather:** A text input field.
- Temperature:** Two input fields labeled "Low" and "High".
- Weather Day:** A toggle switch currently set to "NO".

Below these fields are two rich text editors:

- Remarks:** A text area with a toolbar showing font size (14px), bold (B), italic (I), underline (U), bulleted list, numbered list, and text color (A).
- Bid Items Affected:** A text area with a similar toolbar.

At the bottom right, there is a blue "Help" button with a question mark icon.

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

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Submit For Approval

Actions

Reports

Daily Report

Edit

Report Date

12/22/2018

Report Status

Draft

Prime Contractor

PETERSON CONTRACTORS INC.

Weather Day?

No

Weather

Cloudy, Drizzle

Temperature

Low: 30° High: 39°

Created By

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

Remarks

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

Controlling Item of Work

Clearing and Grubbing

Personnel

Edit

No personnel found.

Equipment

Edit

No equipment found.

Item Postings

Edit

No items found.

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

The screenshot displays a web application interface for managing equipment. The top navigation bar shows the breadcrumb: Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-22-2018 / Daily Report / Equipment. Below this, the main header identifies the project as BROS-C086(60)--8J-86 - 31961, marked as 'Under Construction', with a letting date of October 21, 2014. A secondary navigation bar includes tabs for OVERVIEW, PERSONNEL, EQUIPMENT (which is active), ITEM POSTINGS, and ATTACHMENTS. The main content area is titled 'Equipment' and contains a message: 'No equipment found.' Below this message are two buttons: 'Save' and 'Add'. The 'Add' button is highlighted with a green circle. Additionally, there is a 'Save' button and an 'Add' button (also highlighted with a green circle) located in the top right corner of the main content area. A left sidebar contains various navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, and MATERIALS.

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

The screenshot displays the 'Equipment' management interface. On the left is a vertical sidebar with navigation options: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, STOCKPILES, TIME LIMITS, CHANGE ORDERS, and PUNCH LIST. The main content area has tabs for OVERVIEW, PERSONNEL, EQUIPMENT (selected), ITEM POSTINGS, and ATTACHMENTS. A green success message at the top states 'The equipment has been saved successfully.' Below this, two equipment entries are shown. Each entry includes a Description dropdown, an Active Count and Active Hours input, a Contractor dropdown, an Idle Count and Idle Hours input, and a Comments text area. The first entry is for a 'Bulldozer' with 1 active count and 8.00 active hours, and 1 idle count and 2.00 idle hours. The second entry is for an 'Excavator' with the same counts. At the top right of the equipment list, there are 'Save', 'Add', and 'Cancel' buttons. At the bottom center, there are 'Save' and 'Add' buttons. The 'Save' buttons are blue, and the 'Add' buttons are gray.

Description	Contractor	Active Count	Active Hours	Idle Count	Idle Hours	Comments
Bulldozer	PETERSON CONTRACTORS INC.	1	8.00	1	2.00	Bulldozer pushing downed trees to pile for disposal.
Excavator	PETERSON CONTRACTORS INC.	1	8.00	1	2.00	Excavation grabbing downed trees and moving where they can be pushed by bulldozer.

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

The screenshot shows a software interface for daily activity tracking. A green oval highlights the 'Equipment' section and the 'CONTRACTORS' menu item in the sidebar.

Left Sidebar:

- MATERIALS
- STOCKPILES
- TIME LIMITS
- CHANGE ORDERS
- PUNCH LIST
- PAYMENTS
- CONTRACTORS** (highlighted)
- FUNDING
- MORE

Main Content Area:

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

Controlling Item of Work
Clearing and Grubbing

Personnel Edit

Excavation Crew – PETERSON CONTRACTORS INC.

Laborer	3	30.00 hours
Equipment Operator	2	20.00 hours
Worker Type #3	1	10.00 hours

Structure Crew – PETERSON CONTRACTORS INC.

Laborer	1	10.00 hours
Equipment Operator	1	10.00 hours

Displaying all 2 crews

Equipment Edit

Description	Active	Idle	Comments	Contractor
Bulldozer	1 (8.00 hours)	1 (2.00 hours)	Bulldozer pushing downed trees to pile for disposal.	PETERSON CONTRACTORS INC.
Excavator	1 (8.00 hours)	1 (2.00 hours)	Excavation grabbing downed trees and moving where they can be pushed by bulldozer.	PETERSON CONTRACTORS INC.

Displaying all 2 equipment

Item Postings Edit

No items found.

Attachments Edit

No attachments found.

D. Item Postings Tab

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

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

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

The screenshot displays the Appia software interface. At the top, a green banner states "The daily report has been saved successfully." Below this, a breadcrumb trail reads: "Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 12-19-2018 / Daily Report / Edit". The main header area shows the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" status tag, and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014". A horizontal tab bar contains five tabs: "OVERVIEW", "PERSONNEL", "EQUIPMENT", "ITEM POSTINGS" (which is circled in green), and "ATTACHMENTS". The "Edit" form is divided into two columns. The left column contains fields for "Report Date" (12/19/2018), "Prime Contractor" (PETERSON CONTRACTORS INC.), "Created By" (Nicole Stinn), and "Report Status" (Draft). The right column contains a "Weather" text input, a "Temperature" section with "Low" and "High" input fields, and a "Weather Day" toggle switch set to "NO". Below these fields is a "Remarks" section with a rich text editor toolbar (font size 14px, bold, italic, underline, bulleted list, numbered list, link, unlink, text color) and a large text area. At the bottom, there is a "Bid Items Affected" section with a similar rich text editor toolbar and text area. A vertical sidebar on the left contains icons and labels for "OVERVIEW", "LABS", "QUERY", "ALL REPORTS", "DAILY ACTIVITIES" (highlighted in red), "ITEMS", "MATERIALS", "STOCKPILES", "TIME LIMITS", "CHANGE ORDERS", and "DITCH LIST".

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

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

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

Under Construction

Submit For Approval

Actions

Reports

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Daily Report

Edit

Report Date

12/22/2018

Report Status

Draft

Prime Contractor

PETERSON CONTRACTORS INC.

Weather Day?

No

Weather

Cloudy, Drizzle

Temperature

Low: 30°

High: 39°

Created By

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

Remarks

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

Controlling Item of Work

Clearing and Grubbing

Personnel

Edit

No personnel found.

Equipment

Edit

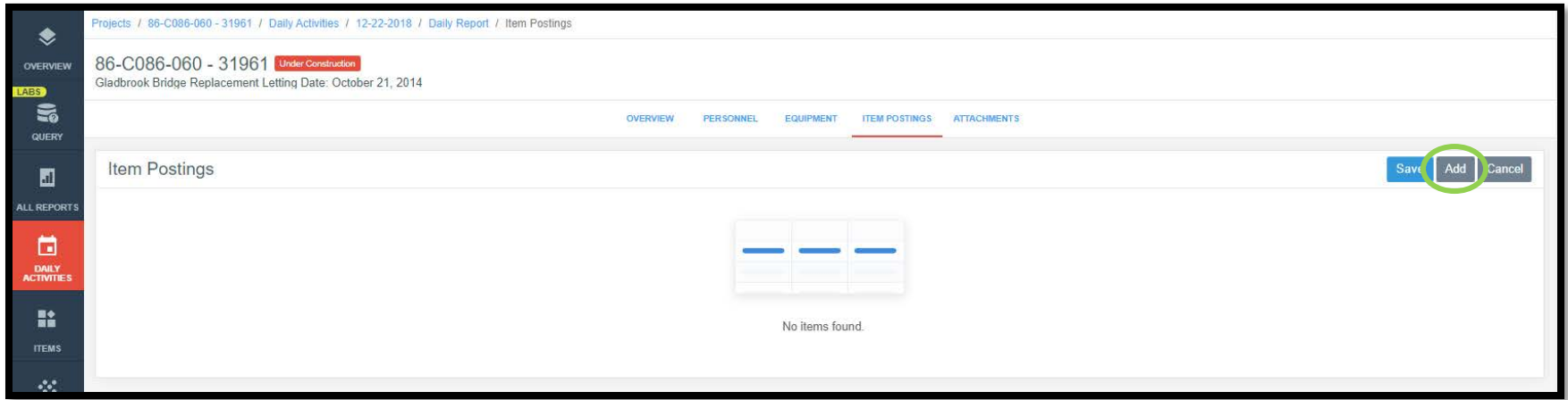
No equipment found.

Item Postings

Edit

No items found.

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



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

Add Project Items










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

3 Item(s)

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

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

Add Project Items

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

1

2

Next >

Last »

Displaying items 1 - 30 of 60 in total

3 Item(s)

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

OVERVIEW

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

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

75-C075-166

Under Construction

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

OVERVIEW

PERSONNEL

EQUIPMENT

ITEM POSTINGS

ATTACHMENTS

Item Postings

Import FieldGenius® Save Add Cancel

0020: 2102-2710070

CY

EXCAVATION, CLASS 10, ROADWAY AND BORROW

x

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
620.000	0.000	620.000	0.000	0.000

view more

0120: 2303-1258283

TON

ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC

x

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
23.000	0.000	23.000	0.000	0.000

view more

0030: 2105-8425015

CY

TOPSOIL, STRIP, SALVAGE AND SPREAD

x

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
2,200.000	0.000	2,200.000	0.000	0.000

view more

0690: 2533-4980005

LS

MOBILIZATION

x

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
---------------------	------------------	--------------------	-----------------	--------------

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

The screenshot displays the 'Item Postings' interface. On the left is a sidebar with navigation icons for Overview, Query, All Reports, Daily Activities (highlighted in red), Items, Materials, Stockpiles, Time Limits, and Source. The main area shows a list of items with columns for Authorized Quantity, Pending Quantity, Remaining Quantity, Quantity Placed, and Total Placed. Item 0120 is expanded, showing a 'view more' button and additional data entry fields. A green oval highlights the expanded section for item 0120, which includes fields for Contractor, Remarks, Location, Station From, Station To, Offset Distance, and Offset Direction. The 'view more' button is located between the item header and the expanded fields.

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

Expanded Item 0120 Details:

- Contractor: GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.
- Remarks: [Empty text area]
- Location: [Empty text area]
- Station From: [Empty text field] + [Empty text field]
- Station To: [Empty text field] + [Empty text field]
- Offset Distance: [Empty text field]
- Offset Direction: [No Type] (dropdown)

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

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

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

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** ATTACHMENTS

Item Postings Import FieldGenius® Save Add Cancel

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

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

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

Projects / 86-C086-060 - 31961 / Daily Activities / 12-23-2018 / Daily Report / Item Postings

86-C086-060 - 31961 Under Construction
 Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW PERSONNEL EQUIPMENT **ITEM POSTINGS** ATTACHMENTS

Item Postings

0190: 2533-4980005 FA
 MOBILIZATION

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed
1.000	0.000	0.750	0.250

0210: 2101-0850001 ACRE [view more](#)
 CLEAR+GRUBB

Authorized Quantity	Pending Quantity	Remaining Quantity
2.700	0.000	2.700

Contractor: PETERSON CONTRACTORS INC

Station From: 48

Station To: 48

Remarks: Trees have been cut down, but stumps remain in place

Location: SW corner of existing bridge

0210: 2101-0850001 ACRE [view less](#)
 CLEAR+GRUBB

Authorized Quantity	Pending Quantity	Remaining Quantity
2.700	0.000	2.700

0280: 2518-0910000 FA [view more](#)
 SAFETY CLOSURE

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed
---------------------	------------------	--------------------	-----------------

Area: Acre

[Preview](#)

CALCULATED RESULT
 length * width / 43560
1.033

* Length (FT)
 450.000

* Width (FT)
 100.000

[Use](#) [Help](#) [Cancel](#)

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

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

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

Projects / 86-C086-060 - 31961 / Daily Activities / 12-22-2018 / Daily Report / Item Postings

86-C086-060 - 31961 Under Construction
Gladbrook Bridge Replacement Letting Date: October 21, 2014

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

Item Postings Save Add Cancel

Authorized Quantity	Pending Quantity	Remaining Quantity	Quantity Placed	Total Placed
0190: 2533-4980005 LS MOBILIZATION ✕				
1.000	0.000	0.750	0.250	0.250
0210: 2101-0850001 ACRE CLEAR+GRUBB view more ✕				
2.700	0.000	1.167	1.033	1.533
0210: 2101-0850001 ACRE Manual CLEAR+GRUBB view more ✕				
2.700	0.000	1.167	0.500	1.533
0380: 2518-6910000 EACH SAFETY CLOSURE view more ✕				
4.000	0.000	3.000	1.000	1.000

Displaying all 4 item postings

Save Add

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

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES ITEMS

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

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS REVIEW MATERIALS ATTACHMENTS

Item Postings Save Add Cancel

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

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

view more

Displaying 1 item posting

Save Add

QUERY ALL REPORTS DAILY ACTIVITIES ITEMS MATERIALS STOCK PILES TIME LIMITS CHANGE ORDERS PUNCH LIST

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

Item Postings Save Add Cancel

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

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

Contractor
 PETERSON CONTRACTORS INC.

Remarks
 CY Used = 17 1/4
 Load Number Tested = 1
 Air Test = 6.5%
 Slump Test = 3 1/2"
 Mix = C4WR-C20-S20
 Plant = Manatts (Tama)

Location
 South Pier - Piling #s 1-5

Station From
 48 + 34.00

Station To
 +

view less

Displaying 1 item posting

Save Add

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

E. Attachments Tab

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

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

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

The screenshot displays the Appia software interface. On the left is a dark sidebar with navigation icons and labels: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area has a breadcrumb trail: Projects / 75-C075-166 / Daily Activities / 01-03-2024 / Daily Report / Edit. Below this, the project ID '75-C075-166' is shown with a red 'Under Construction' tag, followed by a long alphanumeric string. A horizontal tab bar contains OVERVIEW, PERSONNEL, EQUIPMENT, ITEM POSTINGS, and ATTACHMENTS (which is circled in green). The 'Edit' form includes fields for Report Date (01/03/2024), Prime Contractor (GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.), Created By (Nicole Stinn), and Report Status (Draft). There are also input fields for Weather, Temperature (Low and High), and a Weather Day toggle switch set to 'NO'. At the bottom is a Remarks section with a text editor toolbar showing options for font size (14px), bold, italic, underline, and alignment.

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

The screenshot displays a software interface for project management. On the left is a vertical sidebar with icons and labels for different sections: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area at the top shows project details for '75-C075-166' with a status of 'Under Construction'. It includes buttons for 'Submit For Approval', 'Actions', and 'Reports'. Below this, the 'Daily Report' section contains fields for Report Date (01/03/2024), Report Status (Draft), Prime Contractor (GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.), Weather Day? (No), and Created By (Nicole Stinn on 01/12/2024 04:35 PM EST). An 'Edit' button is located in the top right of this section. The subsequent sections are 'Personnel', 'Equipment', 'Item Postings', and 'Attachments', each with a message 'No [category] found.' and an 'Edit' button. The 'Edit' button for the 'Attachments' section is circled in green.

75-C075-166 Under Construction Submit For Approval Actions Reports

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

Daily Report Edit

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

Personnel Edit

! No personnel found. ×

Equipment Edit

! No equipment found. ×

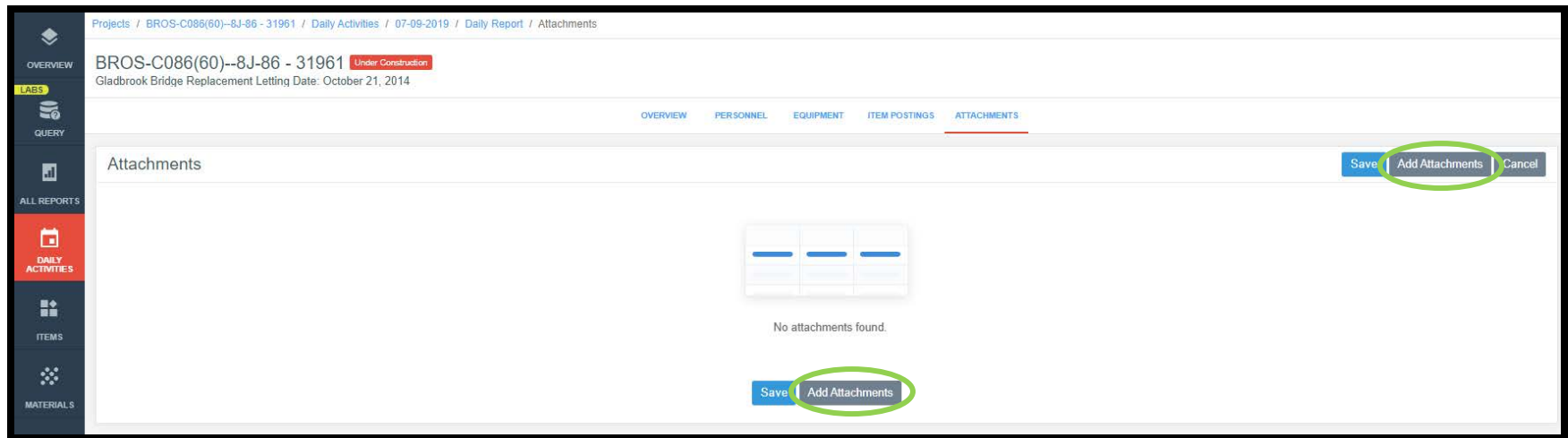
Item Postings Edit

! No items found. ×

Attachments Edit

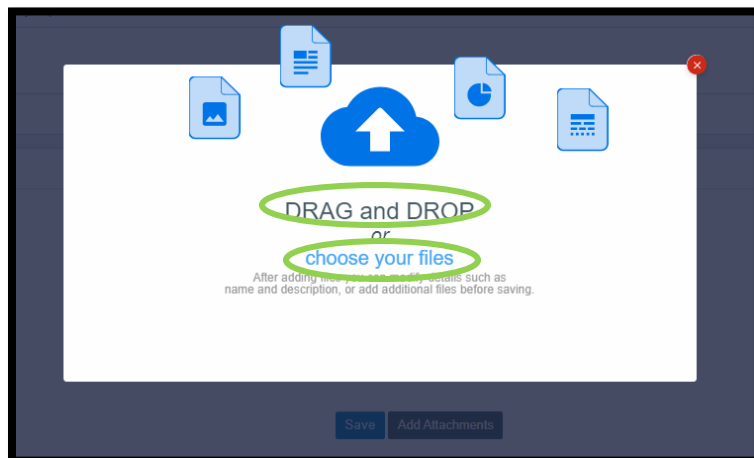
! No attachments found. ×

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



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

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



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

Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 07-09-2019 / Daily Report / Attachments

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

OVERVIEW PERSONNEL EQUIPMENT ITEM POSTINGS ATTACHMENTS

Attachments

Save Add Attachments Cancel

Log of Piling Driven (North Abutment).pdf 621 KB

* Name
Log of Piling Driven (North Abutment).pdf

Description

TC Diary WE 04-04-15.pdf 169 KB

* Name
TC Diary WE 04-04-15.pdf

Description

Save Add Attachments

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

Item Postings

No items found.

Attachments

Name	Description	Submission Date
Log of Piling Driven (North Abutment).pdf		02/18/2021 03:53 PM EST
TC Diary WE 04-04-15.pdf		02/18/2021 03:54 PM EST

Displaying all 2 attachments

F. Submitting Daily Reports for Approval & Reviewing Materials

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

The screenshot shows a web application interface for submitting a daily report. At the top, a green banner indicates "The item posting has been updated successfully." Below this, the breadcrumb trail reads: Projects / BROS-C086(60)--8J-86 - 31961 / Daily Activities / 02-08-2019 / Daily Report. The main header displays the project name "BROS-C086(60)--8J-86 - 31961" with a red "Under Construction" tag, and the location "Gladbrook Bridge Replacement Letting Date: October 21, 2014". In the top right corner, there is a blue "Submit For Approval" button, which is circled in green, along with "Actions" and "Reports" dropdown menus. The left sidebar contains navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES (highlighted in red), ITEMS, MATERIALS, STOCKPILES, and TIME LIMITS. The main content area is titled "Daily Report" and includes an "Edit" button. It contains several sections: "Report Date" (02/08/2019), "Report Status" (Draft), "Prime Contractor" (PETERSON CONTRACTORS INC.), "Weather Day?" (No), "Weather" (Sunny), "Temperature" (Low: 26°, High: 34°), "Created By" (Nicole Stinn on 12/31/2020 03:14 PM EST), "Remarks" (Today PCI poured the rest of the south pier encasements. 18 cubic yards of concrete was ordered and 17 3/4 was placed. I tested the 1st truck to the site for air and slump. The air was 6.5% and the slump was 3 1/2". They had a slight problem with encasement 5. The bottom of the encasement started to move which allowed some concrete to flow out of the encasement. Kenny (PCI foreman) got the hole fixed and there was no more concrete flowing out. Other than that the pour went very well. No other concerns or questions came up at that time.), "Controlling Item of Work" (Concrete Encasement of Steel H-Piles, HP 14x73 (P10L Type 3)), and "Personnel" (No personnel found.).

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

The screenshot shows a pop-up box with a light gray background and a dark border. It contains the text "The daily report has materials to be reviewed" in a dark gray font. At the bottom right, there are two buttons: a blue "Review Materials" button and a gray "Submit For Approval" button.

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

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

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

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

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

Example: Project imported prior to Reference Data Collections

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

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

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

Review Materials Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity
0140: 2501-5478073	LF	396.000	90.000	\$76.100	0.000
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73					

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
READY MIX CONCRETE FOR STRUCTURES	0.000 CY/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
STEEL REINFORCEMENT, APPROVED SUPPLIER	0.000 LB/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
COARSE AGGREGATE FOR CONCRETE, STRUCTURES	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
FINE AGGREGATE FOR CONCRETE, STRUCTURES	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
FLY ASH	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
ADMIXTURES, NORMAL WATER REDUCING	0.000 GAL/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
ADMIXTURES, AIR ENTRAINING	0.000 GAL/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
WATER FOR CONCRETE AND MORTAR	0.000 GAL/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000
PORTLAND CEMENT	0.000 TON/LF	0.000	0.000	HBP Federal Aid (Non-FM)	0.000	0.000

Display 1 item posting

Save Help

Actual materials listed.

Usage rate should be 0.000
for all materials.

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

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

OVERVIEW
PERSONNEL
EQUIPMENT
ITEM POSTINGS
REVIEW MATERIALS
ATTACHMENTS

Review Materials

Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity
0040: 2303-0000100	TON	407.000	156.780	\$108.790	0.000
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN					

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>
0000-0000001 PAYROLL	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	<input type="text" value="0.000"/>

Displaying 1 item posting

Save

Materials listed for bid item, payroll, and LDs.

Usage rate should be 0.000 for all materials.

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

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

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

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

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

Item Postings

0110: 2408-7800000 LB
STRUCTURAL STEEL

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

Contractor: CHRISTENSEN BROS. INC.

Station From: +

Offset Distance: Offset Direction: [No Type]

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

Option #1 (Preferred)

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

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

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

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

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

Review Materials
Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity
0040: 2303-0000100	TON	407.000	156.780	\$108.790	0.000
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN					

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	-120.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	120.000	120.000
0000-0000001 PAYROLL	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000

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

Review Materials
Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity
0040: 2303-0000100	TON	407.000	156.780	\$108.790	0.000
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN					

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000
0000-0000001 PAYROLL	0.000 None/TON	0.000	-156.780	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	156.780	156.780
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000

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

Review Materials


Save Cancel

Item	Unit	Authorized Quantity	Quantity Placed	Unit Price	Paid Quantity
0040: 2303-0000100	TON	407.000	156.780	\$108.790	0.000
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN					

Material	Usage Rate	Approved Quantity	Remaining Quantity	Fund Package	Used Quantity	* Material Quantity
2303-0000100 HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN	0.000 TON/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000
0000-0000001 PAYROLL	0.000 None/TON	0.000	0.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	0.000	0.000
0000-0000002 LIQUIDATED DAMAGES	0.000 None/TON	0.000	-50.000	46-C046-085-CAT-1 46-C046-085-CAT-1 46-C046-085	50.000	50.000

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

Example Payment screen

OVERVIEW SUMMARY WORK PERFORMED ATTACHMENTS							
Work Performed							In dollars? <input checked="" type="checkbox"/>
Line Number	Item ID	Unit	Authorized	Previous	Current	Overages	Insufficient
Section: 0001 - STP-S-C046(85)--5E-46, Roadway Items							
0040	2303-0000100	TON	\$44,277.53	\$0.00	\$0.00		
HOT MIX ASPHALT MIXTURE, COMMERCIAL MIX (INCLUDES ASPHALT BINDER), AS PER PLAN							
8010	2102-5020010	STA	\$30,000.00	\$0.00	\$7,500.00		
OBLITERATE OLD ROADBED							

Option #2 (Less Desirable)

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

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

Option #3 (Less Desirable)

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

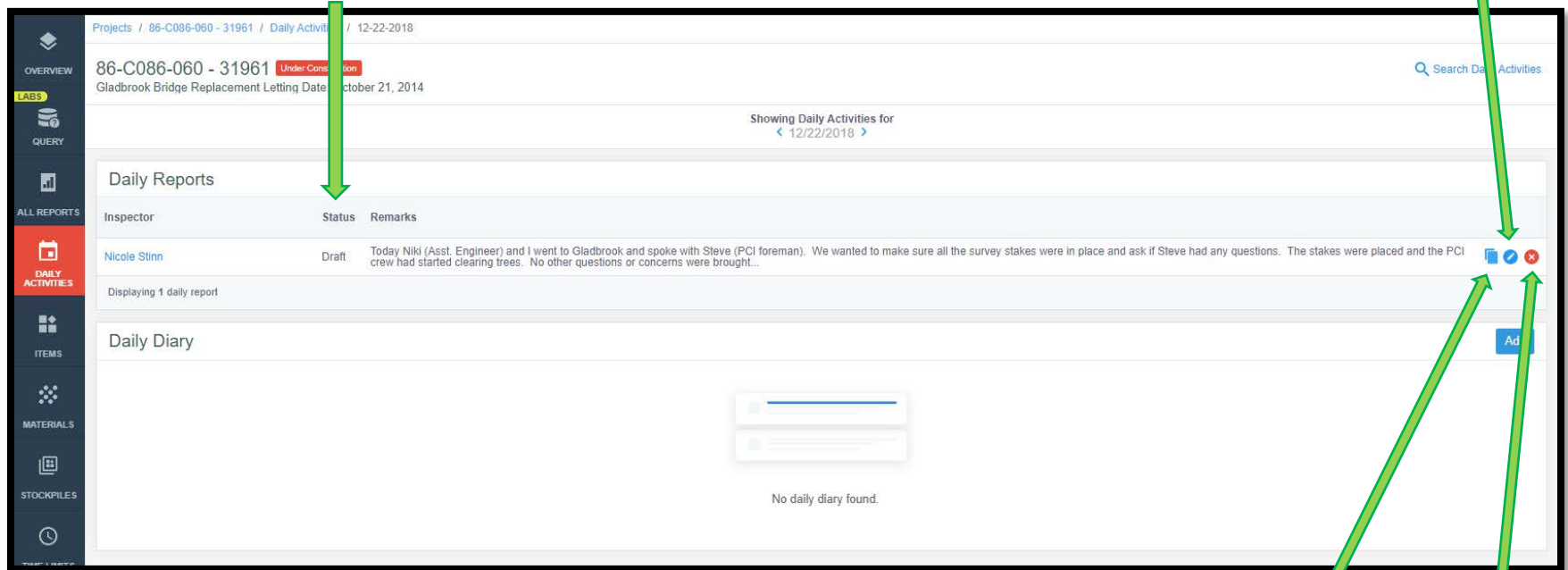
Option #4 – No payment

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

H. Additional “Daily Activities” Information

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

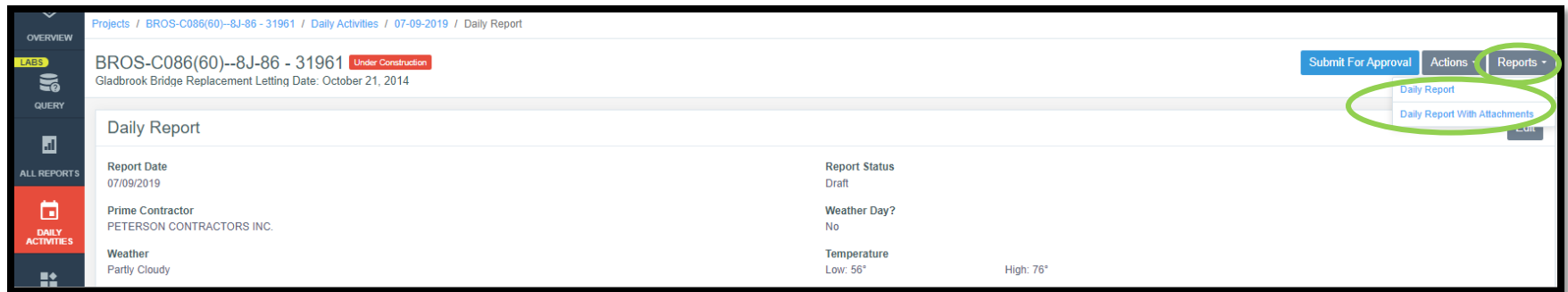
If you want to see what status your report is in (Draft, Pending, or Approved), you can look in the Status column on the view. Additionally, the calendar view will list the report’s status.



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

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

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



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



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

Description Gladbrook Bridge Replacement
Letting Date: October 21, 2014

Report Date 02/08/2019

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

Status Draft

Weather Sunny

Temperature 26° to 34°

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

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

Controlling Item of Work

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

Daily Report:
BROS-C086(60)--8J-86 - 31961

02/18/2021
Page 1 of 2

Item Postings

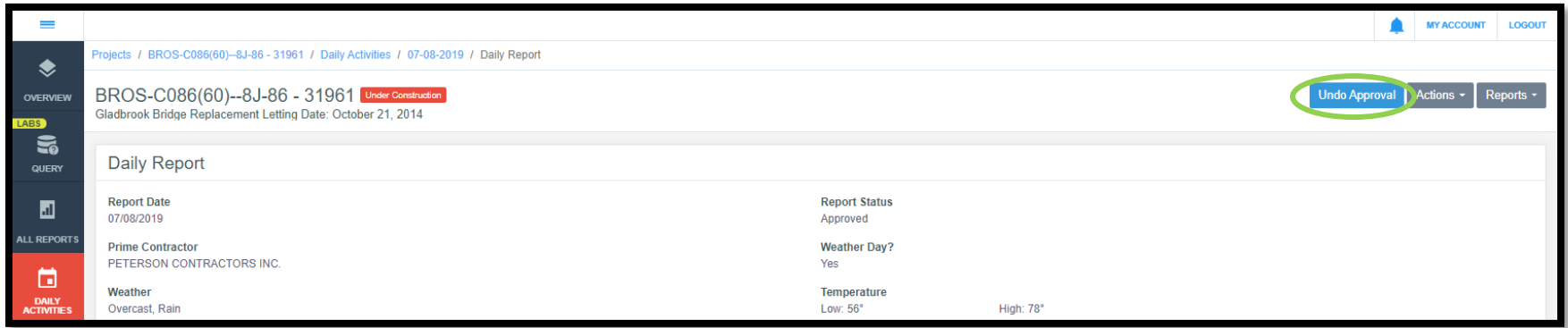
Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
Section: 1 - ITEMS FOR A 244'-0" X 30'-0" PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE					
0140	2501-5478073	LF	\$76.100	90.000	\$6,849.00
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73					
Contractor: PETERSON CONTRACTORS INC.		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

Daily Report:
BROS-C086(60)--8J-86 - 31961

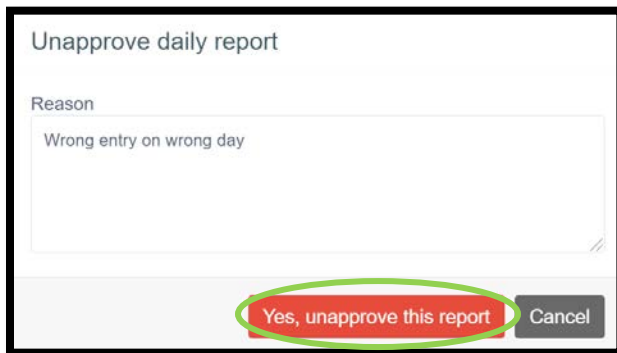
02/18/2021
Page 2 of 2

I. Un-approving a Daily Report

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



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



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

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

6 - Items

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

Projects / 75-C075-166

75-C075-166 Under Construction

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

Overview Edit

General Information

Project

Work Type
PCC PAVEMENT WIDENING / PCC RESURFACING

Location

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

Management

Prime Contractor
GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.

Created By

Awarded Amount \$
\$2,482,485.15

Authorized Amount ✓
\$2,482,485.15

Approved Changes ~
\$0.00

Description

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

Amount Paid

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

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

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

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

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

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

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

MOBILIZATION									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
<div><div></div><div>0200</div></div>	2536-6745045	LS	1.000		1.000	0.000	\$6,300.00		\$6,300.00
RMVL OF ASBESTOS									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
Displaying all 20 items									
Section: 2 - ROADWAY ITEMS									Section Total: \$913,128.99
<div>Add Item</div>									
<div><div></div><div>0210</div></div>	2101-0850001	ACRE	2.700		2.700	0.000	\$4,250.00		\$11,475.00
CLEAR+GRUBB									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
<div><div></div><div>0220</div></div>	2102-2625001	CY	36,540.000		36,540.000	0.000	\$6.750		\$246,645.00
EMBANKMENT-IN-PLACE, CONTRACTOR FURNISH									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
<div><div></div><div>0230</div></div>	2102-2710070	CY	24,950.000		24,950.000	0.000	\$3.500		\$87,325.00
EXCAVATION, CL 10, RDWY+BORROW									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
<div><div></div><div>0240</div></div>	2105-8425015	CY	5,920.000		5,920.000	0.000	\$4.000		\$23,680.00
TOPSOIL, STRIP, SALVAGE+SPREAD									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
<div><div></div><div>0250</div></div>	2115-0100000	CY	75.000		75.000	0.000	\$60.000		\$4,500.00
MODIFIED SUBBASE									
Quantity Placed					Quantity Paid				
<div><div></div><div>0.0%</div></div>					<div><div></div><div>0.0%</div></div>				
<div><div></div><div>0260</div></div>	2123-7450000	STA	14.000		14.000	0.000	\$225.000		\$3,150.00

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

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

Items

Add Section

Actions

Search for Line Number, Item ID, Description and Unit

Search

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

In the pop-out box, click “History”.

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

Items

Add Section

Actions

Search for Line Number, Item ID, Description and Unit

Search

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount
Section: 0001 - FM-C004(116)--55-04, Acct ID- 38373, ROADWAY ITEMS							
0010	2121-7425020	TON	2,461.550	2,461.550	3,503.690	\$31.300	\$77,046.52
GRANULAR SHOULDERS, TYPE B							
Quantity Placed			Quantity Paid				
100.0%			0.0%				
0020	2214-5145150	SY	83,157.890	83,157.890	88,697.767	\$1.710	\$142,199.99
PAVEMENT SCARIFICATION							
Quantity Placed			Quantity Paid				
100.0%			0.0%				
0030	2303-1042500	TON	8,146.030	8,146.030	8,131.100	\$56.240	\$458,132.73
HOT MIX ASPHALT HIGH TRAFFIC, INTERMEDIATE COURSE, 1/2 IN. MIX							
Quantity Placed			Quantity Paid				
99.9%			0.0%				
0040	2303-1043500	TON	7,625.090	7,625.090	7,755.500	\$56.950	\$434,248.88
HOT MIX ASPHALT HIGH TRAFFIC, SURFACE COURSE, 1/2 IN. MIX, NO SPECIAL FRICTION REQUIREMENT							

Materials

Add Stockpile

History

Edit

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

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

CONTRACTORS

FUNDING

Item History

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

Postings

Daily Report Date	Created By	Status	Quantity Placed	Amount Placed
07/31/2022	Nicole Stinn	Final	0.300	\$16.87
05/16/2022	Nicole Stinn	Final	8,130.800	\$457,276.19
Totals:			8,131.100	\$457,293.06

Displaying all 2 postings

Payments

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

Displaying all 2 payments

Help

7 - Materials

(Reserved for Future Instructions)

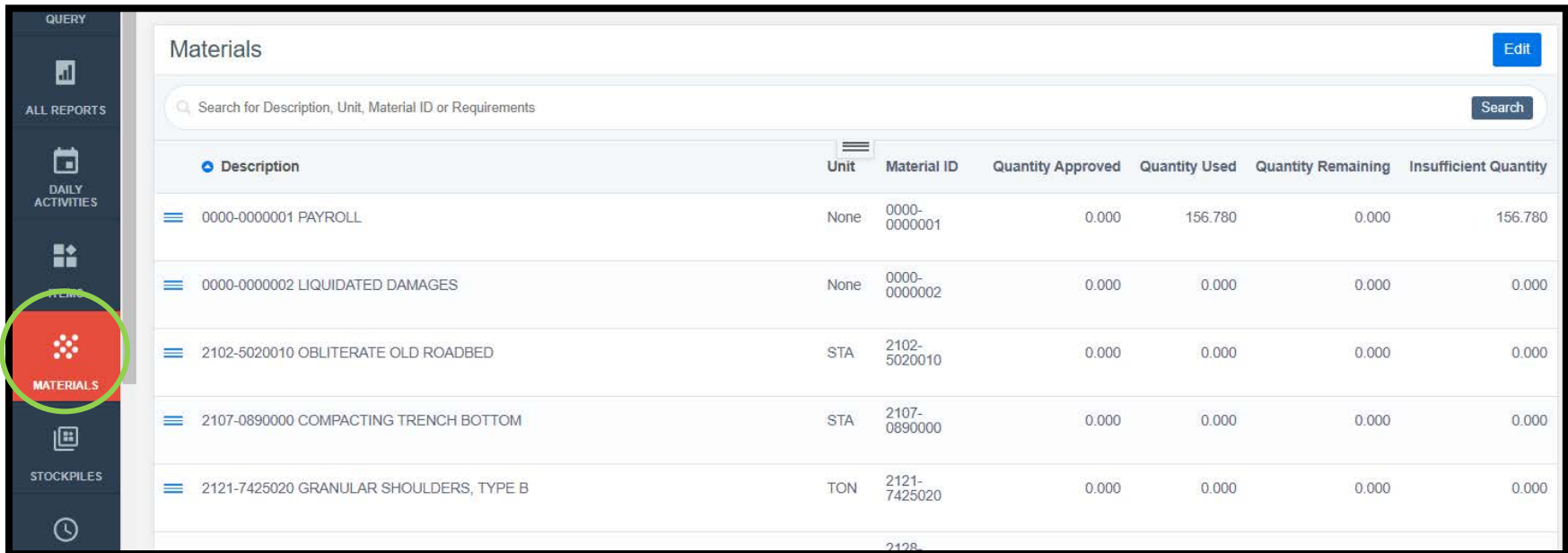
Reserved for future instructions on Materials Tab.

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

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

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

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



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

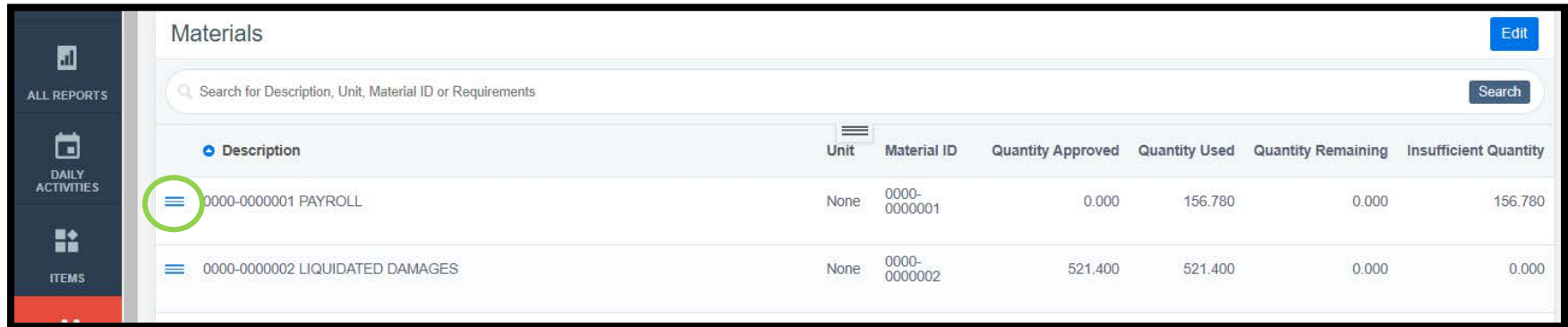
A list of the Materials associated to the project's bid items will display. If a shortage quantity was entered on the Daily Report's Review Materials screen, the shortage quantity will show in the "Quantity Used" column. If that shortage has not yet been approved, even in part, the full shortage quantity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

Materials Edit							
Search for Description, Unit, Material ID or Requirements Search							
Description	Unit	Material ID	Quantity Approved	Quantity Used	Quantity Remaining	Insufficient Quantity	
0000-0000001 PAYROLL	Non		0.000	156.780	0.000	156.780	Un-approved
0000-0000002 LIQUIDATED DAMAGES			521.400	521.400	0.000	0.000	Fully approved
2102-5020010 OBLITERATE OLD ROADBED	STA	2102-5020010	0.000	0.000	0.000	0.000	
2107-0890000 COMPACTING TRENCH BOTTOM	STA	2107-0890000	0.000	0.000	0.000	0.000	
2121-7425020 GRANULAR SHOULDERS, TYPE B	TON	2121-7425020	0.000	0.000	0.000	0.000	
2128-0000200 CONTRACTOR STOCKPILED SHOULDER MATERIAL	TON	2128-0000200	0.000	0.000	0.000	0.000	
2214-5145150 PAVEMENT SCARIFICATION			75.000	150.000	0.000	75.000	Partially approved
2301-9091000 RUMBLE STRIP PANEL (PCC SURFACE)	EACH	2301-9091000	0.000	0.000	0.000	0.000	

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

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

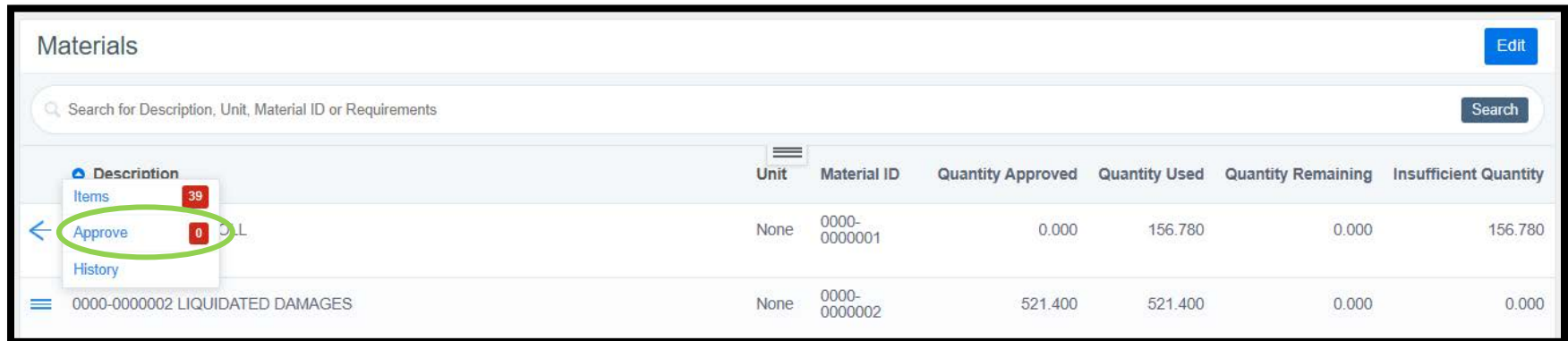
To approve a portion or all of the Insufficient Quantity for a Material, click on the three blue lines on the left side of the line containing the Material.



The screenshot shows the 'Materials' interface with a table containing two rows. The first row, '0000-0000001 PAYROLL', has an insufficient quantity of 156.780. A green circle highlights the three blue horizontal lines (menu icon) on the left side of this row. The second row, '0000-0000002 LIQUIDATED DAMAGES', has an insufficient quantity of 0.000.

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

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



The screenshot shows the same 'Materials' interface, but with a pop-up menu open for the first row. The menu contains three options: 'Items' (with a red badge showing '39'), 'Approve' (highlighted with a green circle), and 'History'. The 'Approve' button is a blue text link.

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

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

0000-0000001 PAYROLL

None

Material Approvals

Add

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

No approvals found.

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

The screenshot shows the 'New' approval screen with the following fields and controls:

- Material Description:** 0000-0000001 PAYROLL
- Material Unit:** None
- Approved Quantity:** 0.000
- Remaining Quantity:** 0.000
- Used Quantity:** 156.780
- Insufficient Quantity:** 156.780
- * Approval Date:** 12/05/2024 (circled in green)
- * Form:** Payrolls Received (dropdown menu, circled in green)
- Supplier:** ** None Selected ** (dropdown menu)
- Manufacturer:** ** None Selected ** (dropdown menu)
- Lot:** (empty text field)
- Approved By:** (empty text field)
- * Quantity:** 96.840 (circled in green)
- Remarks:** (empty text area)
- Made in America:** NO (toggle switch)
- Buttons:** 'Save' and 'Cancel' buttons in the top right corner (circled in green), and 'Save' and 'Add Attachment' buttons in the bottom center (circled in green).

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

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

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

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

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

0000-0000001 PAYROLL None

Material Approvals Add

Description
0000-0000001 PAYROLL

Material ID
0000-0000001

Approved Quantity
96.840

Used Quantity
156.780

Unit
None

Requirements

Remaining Quantity
0.000

Insufficient Quantity
59.940

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

Displaying 1 approval

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

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

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

[Projects](#) / [46-C046-085_8000ItemTest_3projects1contract](#) / [Materials](#) / 0000-0000001 PAYROLL

46-C046-085_8000ItemTest_3projects1contract

Under Construction

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

0000-0000001 PAYROLL None

Material Approvals

Add

Description

0000-0000001 PAYROLL

Material ID

0000-0000001

Approved Quantity

96.840

Used Quantity

156.780

Unit

None

Requirements

Remaining Quantity

0.000

Insufficient Quantity

59.940

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

Displaying 1 approval

96.840

B. Reserved for Future Use

Reserved for future use

81

8 - Stockpiles

A. Adding a Stockpile Item

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

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

21-C021-153 Under Construction

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

Overview Edit

General Information

Project

Work Type
PCC OVERLAY

Location

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

Management

Prime Contractor

Awarded Amount \$
\$4,553,445.96

Authorized Amount ✓
\$4,580,158.96

Approved Changes ↗
\$26,713.00

Description

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

Amount Paid

Amount

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

View if no stockpiles exist

The screenshot shows the 'Stockpiles' screen for project 21-C021-153, which is marked 'Under Construction'. The page header includes the project name and a list of identifiers: STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022. A sidebar on the left contains navigation links: QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, MATERIALS, and STOCKPILES (highlighted in red). The main content area is titled 'Stockpiles' and displays a message 'No stockpiles found.' with a placeholder table. A blue 'Add' button is circled in green in the top right corner. The footer includes the Infotech logo, copyright information (© 2023), and support details: Support Hours: 7:00 AM - 8:00 PM Eastern, Phone: 888 352 2439, Email: support@appia.net.

View if stockpiles already exist

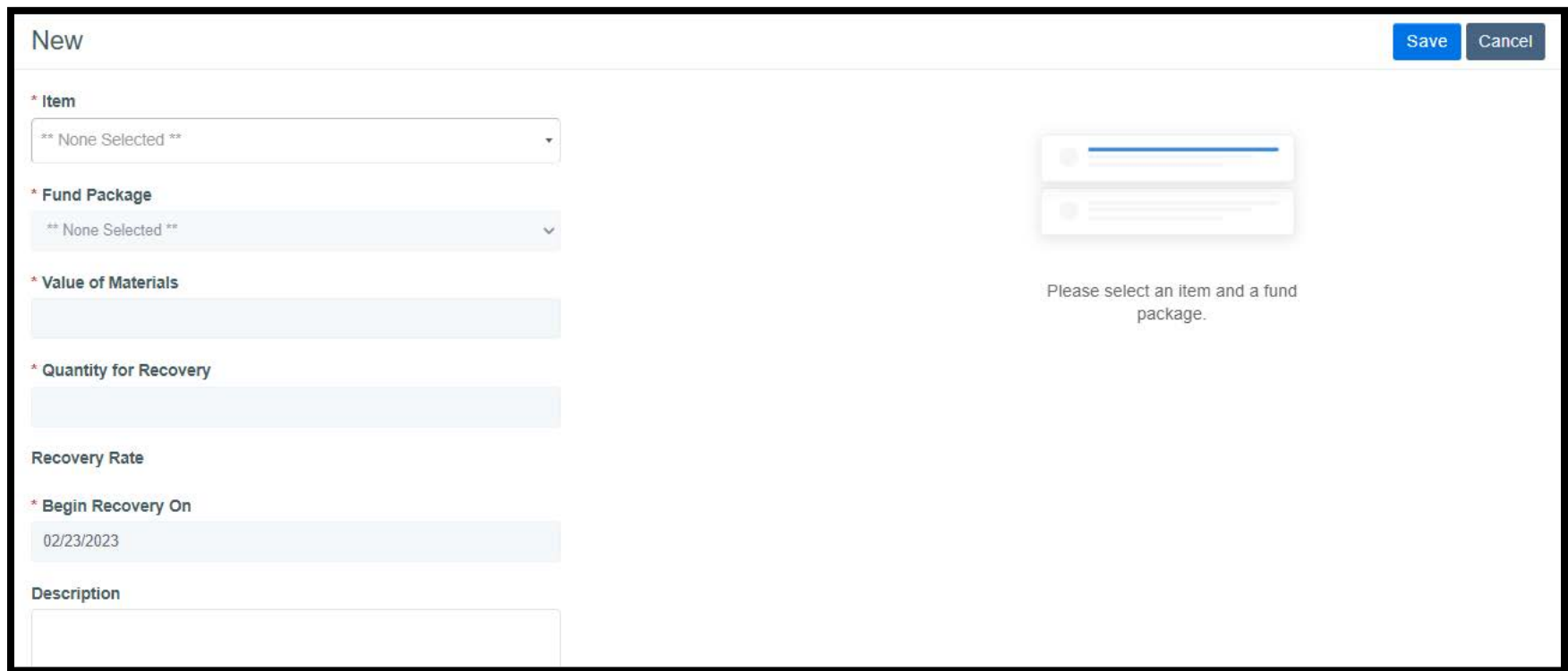
The screenshot shows the 'Stockpiles' screen with one stockpile entry. The 'Add' button is circled in green. The table below lists the stockpile details.

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

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

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

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



The screenshot shows a web form titled "New" with a "Save" button and a "Cancel" button in the top right corner. The form contains several input fields, some of which are disabled (grayed out) until the "Item" field is selected. The fields are:

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

On the right side of the form, there is a message: "Please select an item and a fund package." Above this message are two small, faint icons of a document and a folder.

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

New

SaveCancel

* Item

** None Selected **

Section 0001

0010: 2110-3825010 GRANULAR MATERIAL

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

0030: 2214-5145150 PAVEMENT SCARIFICATION

0040: 2301-0690220 BRIDGE APPROACH, SECONDARY

Recovery Rate

* Begin Recovery On

02/23/2023

Description

Please select an item and a fund package.

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

New

* Item

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

* Fund Package

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

* Value of Materials

\$312,858.00

* Quantity for Recovery

9,550.000

Recovery Rate

\$32.760

* Begin Recovery On

02/23/2023

Description

Authorized Quantity

9,550.000

Quantity Placed

0.000

Quantity Paid

0.000

Quantity Available

9,550.000

Unit

TON

Unit Price

\$32.760

Extension

\$312,858.00

Amount Paid

\$0.00

Stockpiled Amount

\$0.00

Amount Available

\$312,858.00

Save

Cancel

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

New

SaveCancel

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

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

New

SaveCancel

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

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

New

Save
Cancel

<p>* Item</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B</div> <p>* Fund Package</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153</div> <p>* Value of Materials</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; text-align: right;">\$140,000.00</div> <p>* Quantity for Recovery</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; text-align: right;">7,060.000</div> <p>Recovery Rate</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; text-align: right;">\$19.830</div> <p>* Begin Recovery On</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">02/23/2023</div> <p>Description</p> <div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Authorized Quantity</td> <td style="width: 50%;">Extension</td> </tr> <tr> <td>9,550.000</td> <td>\$312,858.00</td> </tr> <tr> <td>Quantity Placed</td> <td>Amount Paid</td> </tr> <tr> <td>0.000</td> <td>\$0.00</td> </tr> <tr> <td>Quantity Paid</td> <td>Stockpiled Amount</td> </tr> <tr> <td>0.000</td> <td>\$0.00</td> </tr> <tr> <td>Quantity Available</td> <td>Amount Available</td> </tr> <tr> <td>9,550.000</td> <td>\$312,858.00</td> </tr> <tr> <td>Unit</td> <td></td> </tr> <tr> <td>TON</td> <td></td> </tr> <tr> <td>Unit Price</td> <td></td> </tr> <tr> <td>\$32.760</td> <td></td> </tr> </table>	Authorized Quantity	Extension	9,550.000	\$312,858.00	Quantity Placed	Amount Paid	0.000	\$0.00	Quantity Paid	Stockpiled Amount	0.000	\$0.00	Quantity Available	Amount Available	9,550.000	\$312,858.00	Unit		TON		Unit Price		\$32.760	
Authorized Quantity	Extension																								
9,550.000	\$312,858.00																								
Quantity Placed	Amount Paid																								
0.000	\$0.00																								
Quantity Paid	Stockpiled Amount																								
0.000	\$0.00																								
Quantity Available	Amount Available																								
9,550.000	\$312,858.00																								
Unit																									
TON																									
Unit Price																									
\$32.760																									

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

Description: Enter a description here, if desired.

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

New

Save

Cancel

* Item

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

* Fund Package

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

* Value of Materials

\$140,000.00

* Quantity for Recovery

7,060.000

Recovery Rate

\$19.830

* Begin Recovery On

02/23/2023

Description

Authorized Quantity

9,550.000

Quantity Placed

0.000

Quantity Paid

0.000

Quantity Available

9,550.000

Unit

TON

Unit Price

\$32.760

Extension

\$312,858.00

Amount Paid

\$0.00

Stockpiled Amount

\$0.00

Amount Available

\$312,858.00

91

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

Stockpile

Edit

Stockpile
#1

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

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

Recovery Rate
\$19.830 per item unit (TON)

Value of Materials
\$140,000.00

Recovered Amount
\$0.00

Remaining Value
\$140,000.00

Begin Recovery On
02/23/2023

Description

Events

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

Begin Recovery On: 02/23/2023.

?

 Help

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

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

21-C021-153 Under Construction

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

Stockpile Edit

Stockpile #1	Begin Recovery On 02/23/2023
Associated Item 0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B	Description
Associated Fund Package 21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	
Recovery Rate \$19.830 per item unit (TON)	
Value of Materials \$140,000.00	
Recovered Amount \$0.00	
Remaining Value \$140,000.00	

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

Stockpiles Add

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

Recovery Progress

0.0%

Displaying 1 stockpile

B. Editing an Existing Stockpile

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

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

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

Overview Edit

General Information

- Project**
Work Type
PCC OVERLAY
- Location**
Location
On M27, from B40 North 6.0 Miles to City of Everly; On B24, from NE corner 16-96-38 W 4 miles to SW corner 18-96-38
- Management**
Prime Contractor

Financials

- Awarded Amount** \$
\$4,553,445.96
- Authorized Amount** ✓
\$4,580,158.96
- Approved Changes** ↗
\$26,713.00

Description

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

Amount Paid

Amount

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

Stockpiles

Add

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

Recovery Progress

0.0%

Displaying 1 stockpile

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

Stockpiles

Add

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

Recovery Progress

0.0%

Displaying 1 stockpile

Stockpile

Edit

Stockpile

#1

Associated Item

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

Associated Fund Package

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

Begin Recovery On

02/23/2023

Description

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

Edit

Save

Cancel

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

Help

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

Edit

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

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

Current Value of Materials
\$140,000.00

Current Quantity for Recovery
7,060.000

* Value Change

* Quantity Change

* Begin Recovery On

* Adjustment Effective Date

New Value of Materials
\$130,000.00

New Quantity for Recovery
7,060.000

Current Recovery Rate
\$19.830

New Recovery Rate
\$18.414

Authorized Quantity
9,550.000

Quantity Placed
0.000

Quantity Paid
0.000

Quantity Available
9,550.000

Unit
TON

Unit Price
\$32.760

Extension
\$312,858.00

Amount Paid
\$0.00

Stockpiled Amount
\$140,000.00

Amount Available
\$312,858.00

Save

Cancel

Help

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

Edit

Associated Item

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

Associated Fund Package

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

Current Value of Materials

\$140,000.00

Current Quantity for Recovery

7,060.000

* Value Change

-\$10,000.00

* Quantity Change

5.000

* Begin Recovery On

02/23/2023

* Adjustment Effective Date

02/23/2023

New Value of Materials

\$130,000.00

New Quantity for Recovery

7,065.000

Current Recovery Rate

\$19.830

New Recovery Rate

\$18.401

Authorized Quantity

9,550.000

Quantity Placed

0.000

Quantity Paid

0.000

Quantity Available

9,550.000

Unit

TON

Unit Price

\$32.760

Extension

\$312,858.00

Amount Paid

\$0.00

Stockpiled Amount

\$140,000.00

Amount Available

\$312,858.00

Save

Cancel

Help

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

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

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

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

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

Notes: Enter a note here, if desired.

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

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

Recovery to Date

\$0.00

Recovery Remaining

\$140,000.00

Quantity Until Recovery

7,060.000

Stockpile Description

Notes

Add Attachment

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

Begin Recovery On: 02/23/2023.

Help

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

Edit

Associated Item

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

Associated Fund Package

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

Current Value of Materials

\$140,000.00

Current Quantity for Recovery

7,060.000

* Value Change

-\$10,000.00

* Quantity Change

5.000

* Begin Recovery On

02/23/2023

* Adjustment Effective Date

02/23/2023

New Value of Materials

\$130,000.00

New Quantity for Recovery

7,065.000

Current Recovery Rate

\$19.830

New Recovery Rate

\$18.401

Authorized Quantity

9,550.000

Quantity Placed

0.000

Quantity Paid

0.000

Quantity Available

9,550.000

Unit

TON

Unit Price

\$32.760

Extension

\$312,858.00

Amount Paid

\$0.00

Stockpiled Amount

\$140,000.00

Amount Available

\$312,858.00

Save

Cancel

?

Help

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

Stockpile

Edit

Stockpile

#1

Begin Recovery On

02/23/2023

Associated Item

0020: 2121-7425020 GRANULAR SHOULDERS, TYPE B

Description

Associated Fund Package

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

Recovery Rate

\$18.401 per item unit (TON)

Value of Materials

\$130,000.00

Recovered Amount

\$0.00

Remaining Value

\$130,000.00

Events

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

Displaying all 2 events

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

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

21-C021-153 Under Construction

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

Stockpile Edit

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

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

Stockpiles Add

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

Recovery Progress

0.0%

Displaying 1 stockpile

9 - Time Limits

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

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

The screenshot displays the 'Overview' page for project 75-C075-166, which is marked as 'Under Construction'. The left sidebar contains a vertical menu with icons and labels for various project management functions. The 'TIME LIMITS' button, represented by a clock icon, is highlighted with a green circle. The main content area shows project details including work type, location, and management information, along with financial metrics like awarded and authorized amounts.

Projects / 75-C075-166

75-C075-166 Under Construction

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

Overview Edit

General Information

Project

Work Type
PCC PAVEMENT WIDENING / PCC RESURFACING

Location

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

Management

Prime Contractor
GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.

Created By
Douglas Heeren

Awarded Amount \$
\$2,482,485.15

Authorized Amount ✓
\$2,482,485.15

Approved Changes ~
\$0.00

Description

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

Amount Paid

Amount paid so far \$0.00	<div>0%</div> of your Awarded \$2,482,485.15	<div>0%</div> of your Authorized \$2,482,485.15	<div>0%</div>
------------------------------	---	--	---------------

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

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

Projects / 75-C075-166 / Time Limits

75-C075-166 Under Construction

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

Time Limits

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

Displaying 1 time limit

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

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

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

75-C075-166 Under Construction

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

Time Limit Edit Cancel

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

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

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

A. Entering Time Charges

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

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

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

Time Limit

Primary

Description	Type	Status
Working Days, Late Start Date - 06/05/2023, Liquidated Damage Rate - 1,000	Working Days	Not Started

Original Days Allowed	Liquidated Damages/Day	Authorized Days Allowed
95.0	\$0.00	95.0

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

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

Edit

Working Days

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

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

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

Primary Deadline?
☒ YES ☐ NO

Work Completed?
☐ YES ☒ NO

< **January** >
2024

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

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

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

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

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

Edit

Working Days

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

Start Date
03/02/2021

Days Charged
8.5

Days Remaining
131.5

Primary Deadline?
☒ YES

Work Completed?
☐ NO

Expected End Date
03/12/2021

Liquidated Damages/Day
\$0.00

Liquidated Damages to Date
\$0.00

SaveCancel

< March >
2021

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

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

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

Edit Save Cancel

Working Days

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

Start Date
03/02/2021

Expected End Date
03/12/2021

Days Charged
8.5

Liquidated Damages/Day
\$0.00

Days Remaining
131.5

Liquidated Damages to Date
\$0.00

Primary Deadline?
☒ YES ☐ NO

Work Completed?
☐ YES ☒ NO

Calendar View: March 2021
March 16, 2021
+ Add Controlling Item
☒ None ☐ 1/2 Day ☐ Full Day
Contractor Working?
☐ Yes ☐ No
Remarks

Done

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

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

Add Item(s) to Section

Search for Item ID, Description and Unit Search

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

Add Items Cancel

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

Edit Save Cancel

Working Days

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

Start Date
03/02/2021

Expected End Date
03/12/2021

Days Charged
8.5

Liquidated Damages/Day
\$0.00

Days Remaining
131.5

Liquidated Damages to Date
\$0.00

Primary Deadline?
☒ YES ☐ NO

Work Completed?
☐ YES ☒ NO

Remove

March 2021
March 16, 2021

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

☒ None
☐ 1/2 Day
☐ Full Day

Contractor Working?
☐ Yes ☐ No

Remarks

Done

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

Edit Save Cancel

Working Days

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

Start Date
03/02/2021

Expected End Date
03/12/2021

Days Charged
8.5

Liquidated Damages/Day
\$0.00

Days Remaining
131.5

Liquidated Damages to Date
\$0.00

Primary Deadline?
☒ YES ☐ NO

Work Completed?
☐ YES ☒ NO

Modal Window: March 16, 2021

Remove

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

☒ None ☐ 1/2 Day ☐ Full Day

Contractor Working?
☒ Yes ☐ No

Remarks

Done

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

Edit Save Cancel

Working Days

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

Start Date
03/02/2021

Expected End Date
03/12/2021

Days Charged
8.5

Liquidated Damages/Day
\$0.00

Days Remaining
131.5

Liquidated Damages to Date
\$0.00

Primary Deadline?
☒ YES ☐ NO

Work Completed?
☐ YES ☒ NO

Calendar View: March 2021

Remove

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

☒ None ☐ 1/2 Day ☐ Full Day

Contractor Working?
☐ Yes ☐ No

Remarks
Reason for Delay: Free Winter Work

Done

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

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

Edit Save Cancel

Working Days

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

Start Date
03/02/2021

Expected End Date
03/12/2021

Days Charged
8.5

Liquidated Damages/Day
\$0.00

Days Remaining
131.5

Liquidated Damages to Date
\$0.00

Primary Deadline?
☒ YES ☐ NO

Work Completed?
☐ YES ☒ NO

Remarks

Reason for Delay: Free Winter Work

Done

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

< March > 2021						
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 1/2 Day	3 Full Day	4 Full Day	5 Full Day	6
7	8 Full Day	9 Full Day	10 Full Day	11 Full Day	12 Full Day	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

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

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

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

Edit

Working Days

Description

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

Start Date

03/02/2021

Expected End Date

03/12/2021

Days Charged

8.5

Liquidated Damages/Day

\$0.00

Days Remaining

131.5

Liquidated Damages to Date

\$0.00

Primary Deadline?

☒ YES

Work Completed?

☐ NO

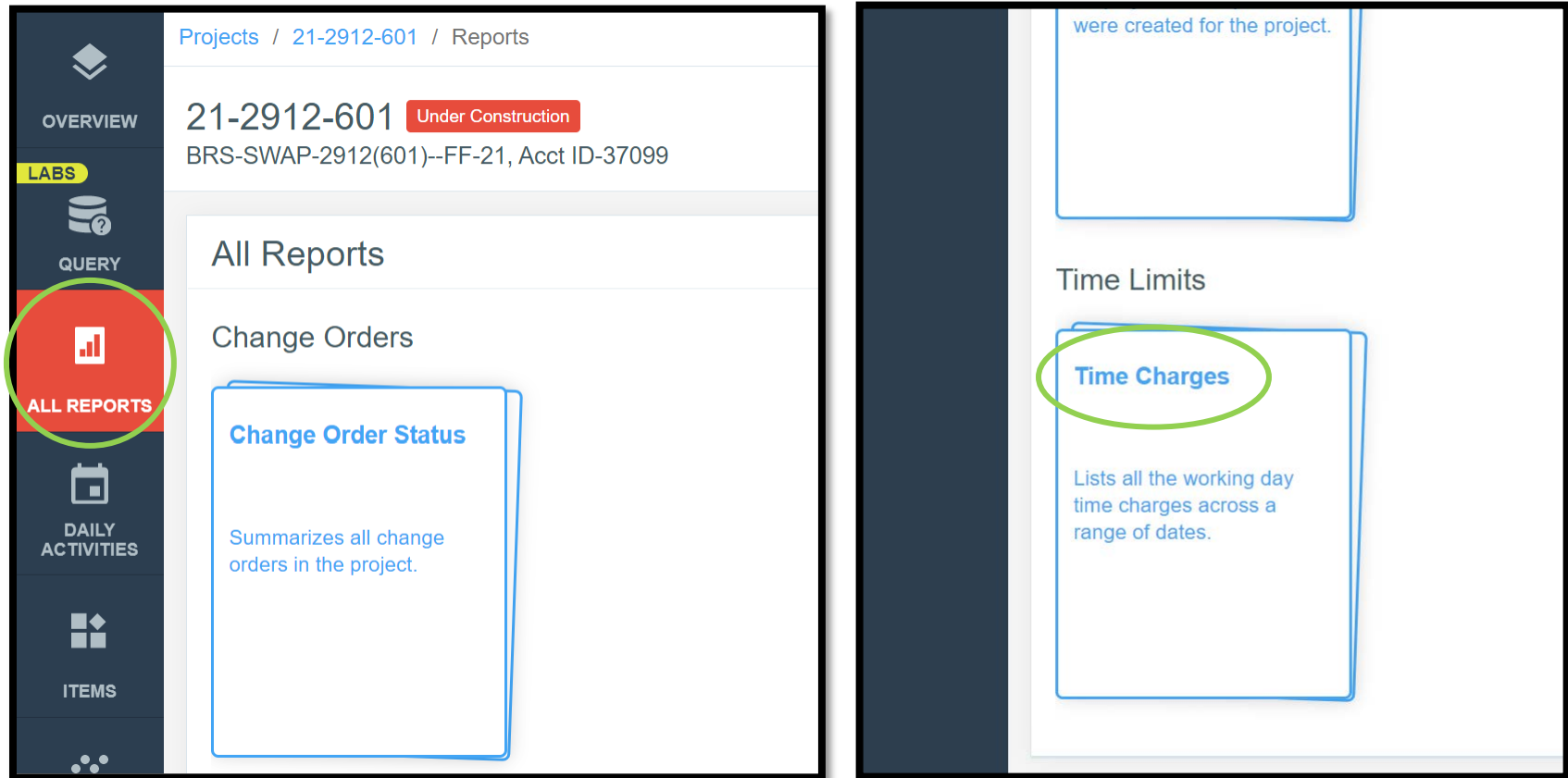
< March >

2021

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

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

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



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

On this screen, make sure you:

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

Time Charges

Run Report Cancel

* Start Date 03/07/2021

* End Date 03/13/2021

Show Remarks?

☒ Yes

☐ No

Show Contractor Working?

☒ Yes

☐ No

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

Time Charges

Run Report Cancel

* Start Date 03/07/2021

* End Date 03/13/2021

Show Remarks?

☒ Yes

☐ No

Show Contractor Working?

☒ Yes

☐ No

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


time_charges

1 / 2 | - 100% + | [icon] [icon]

[download] [print] [menu]

1

2




Iowa Local Systems DEMO ACCOUNT

Time Charges for Working Days

21-2912-601

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

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



Iowa Local Systems DEMO ACCOUNT

Time Charges for Working Days

21-2912-601

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

Time Charges:
21-2912-601

04/06/2021
Page 1 of 2

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

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

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

Time Charges:
21-2912-601

04/06/2021
Page 2 of 2

10 - Change Orders

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

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

Left Sidebar:

- MATERIALS
- STOCKPILES
- TIME LIMITS
- CHANGE ORDERS** (highlighted with a green circle)
- PUNCH LIST
- PAYMENTS

Main Content Area:

Location

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

Management

Prime Contractor
CEDAR VALLEY CORP., LLC.

Project Manager
Niki Stinn

Managing Office
Local Systems

Created By
Douglas Heeren

Right Sidebar:

Letting Date: November 15, 2022

Amount Paid

Amount paid so far	0% of your Awarded \$4,553,445.96	0% of your Authorized \$4,553,445.96	0% of your Approv Paymer \$0.00
\$0.00			

Important Dates

Date Created	Notice to Proceed
Dec 5, 2022	Dec 20, 2022

Progress

Time Complete: 0 Days Time Remaining: 80 Days

0%

A. General Change Order Information

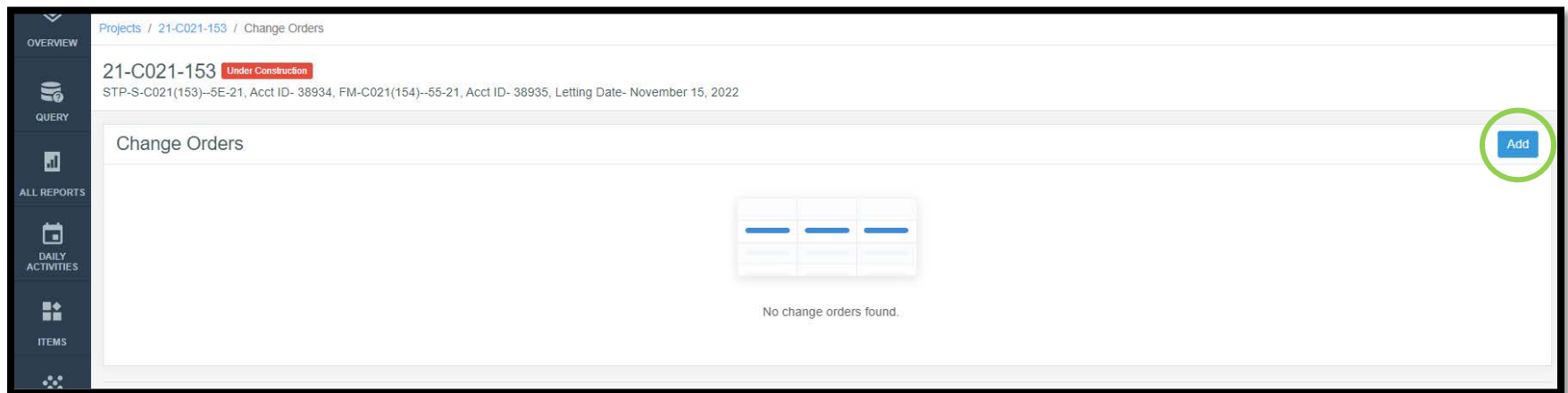
Clicking on the Change Order button in the left menu will bring you to this screen. If you have not yet created any change orders, a message saying “No change orders found” will display. Conversely, if you have already created a change order(s), it will be displayed on the screen.

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

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

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

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



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

Projects / 21-C021-153 / Change Orders

21-C021-153 Under Construction Reports

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

Change Orders Add

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

Displaying 1 change order

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

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

21-C021-153 Under Construction Save Cancel

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

New

Change Order Type: ** None Selected **

Summary:

Description:

14px B I U ≡ ≡ ≡ ≡ ≡ ≡ A

B - Reason for change:

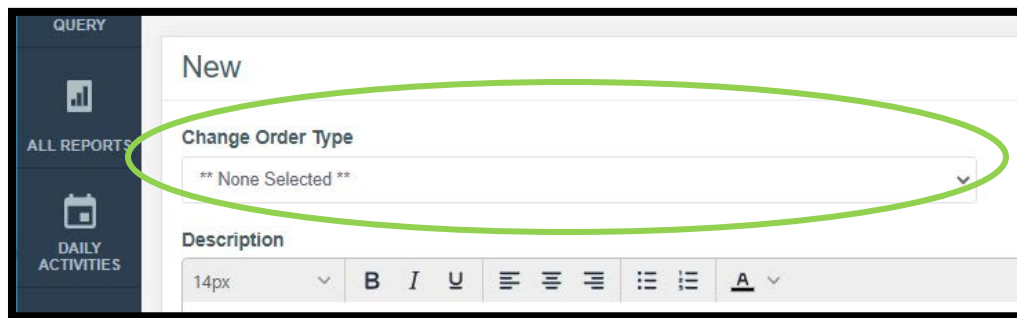
14px B I U ≡ ≡ ≡ ≡ ≡ ≡ A

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

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

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

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



The screenshot shows a software interface for creating a new change order. On the left is a sidebar with 'QUERY', 'ALL REPORTS', and 'DAILY ACTIVITIES'. The main area is titled 'New' and contains a 'Change Order Type' dropdown menu, which is highlighted with a green oval. The dropdown menu currently shows '** None Selected **'. Below the dropdown is a 'Description' field with a rich text editor toolbar.

- Summary: This field may be left blank.



The screenshot shows a 'Summary' field, which is a large text area. The label 'Summary' is circled in green.

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

A screenshot of a text input field labeled "Description" in a green oval. The field has a rich text editor toolbar above it with icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, and text color. The text "14px" is visible in the top left corner of the input area.

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

A screenshot of a text input field labeled "B - Reason for change:" in a green oval. The field has a rich text editor toolbar above it with icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, and text color. The text "14px" is visible in the top left corner of the input area.

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

A screenshot of a form section. The title bar at the top reads "C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G:". Below the title bar is a text area with a "14px" font size indicator and a rich text editor toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink. The text area is currently empty.

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

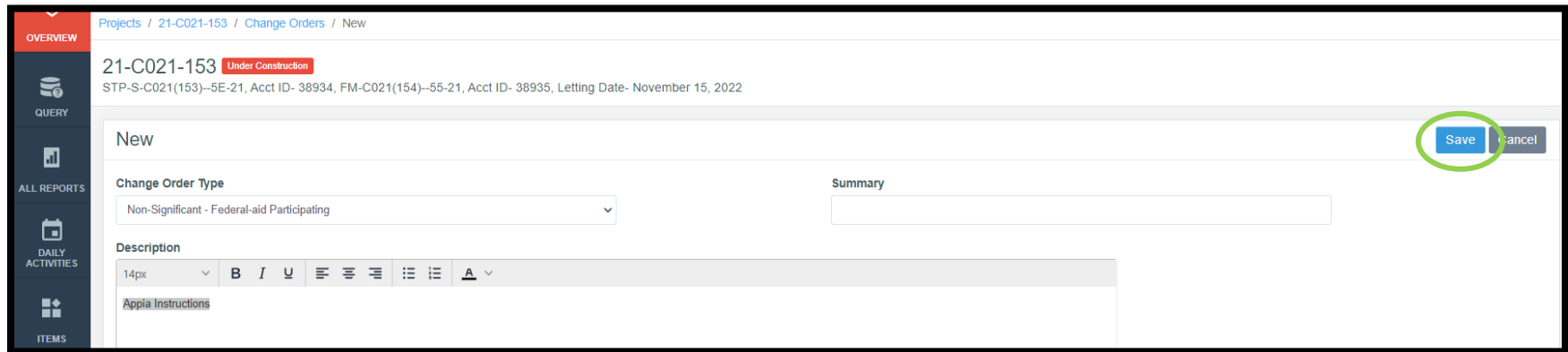
A screenshot of a form section. The title bar at the top reads "D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification):". Below the title bar is a text area with a "14px" font size indicator and a rich text editor toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink. The text area is currently empty.

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



A screenshot of a text editor interface. The title bar reads "E - Contract time adjustment:". Below the title bar is a toolbar with various formatting options (bold, italic, underline, bulleted list, numbered list, indent, outdent, text color). The main text area is empty and ready for input.

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



A screenshot of a software interface for creating a new change order. The interface includes a sidebar with navigation options: OVERVIEW, QUERY, ALL REPORTS, DAILY ACTIVITIES, and ITEMS. The main content area shows the "New" form for a change order. The form includes a "Change Order Type" dropdown menu (currently set to "Non-Significant - Federal-aid Participating"), a "Summary" text field, and a "Description" text area. The "Description" text area has a toolbar with formatting options. The "Save" button is highlighted with a green circle in the top right corner.

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

Projects / 17-C017-035 / Change Orders / Change Order #4

17-C017-035 Under Construction Submit For Approval Actions Reports

BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024

Change Order Edit

Date Created 10/29/2025	Status Draft
Summary	Type Substantial
Description Appia instructions	Total Proposed Amount \$0.00
B - Reason for change: Appia instructions	
C - Settlement for cost(s) of change as follows with items addressed in Sections F and/or G: Appia instructions	
D - Justification for cost(s) (See I.M. 6.000 Attachment D, Chapter 2.36, for acceptable justification): Appia instructions	
E - Contract time adjustment: Appia instructions	

← Information added on previous screen

Quantity Changes Edit

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

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

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

08-C008-079 Under Construction

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

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

[Balance All Items](#)
[Export](#)

Change Order [Edit](#)

Date Created	Status
08/28/2023	Draft

Summary	Type
Description	Total Proposed Amount
	\$0.00

Quantity Changes [Edit](#)

No quantity changes found. [x](#)

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

Change Order

Date Created

08/28/2023

Summary

Description

Status

Draft

Type

Total Proposed Amount

-\$438,744.09

Edit

Quantity Changes

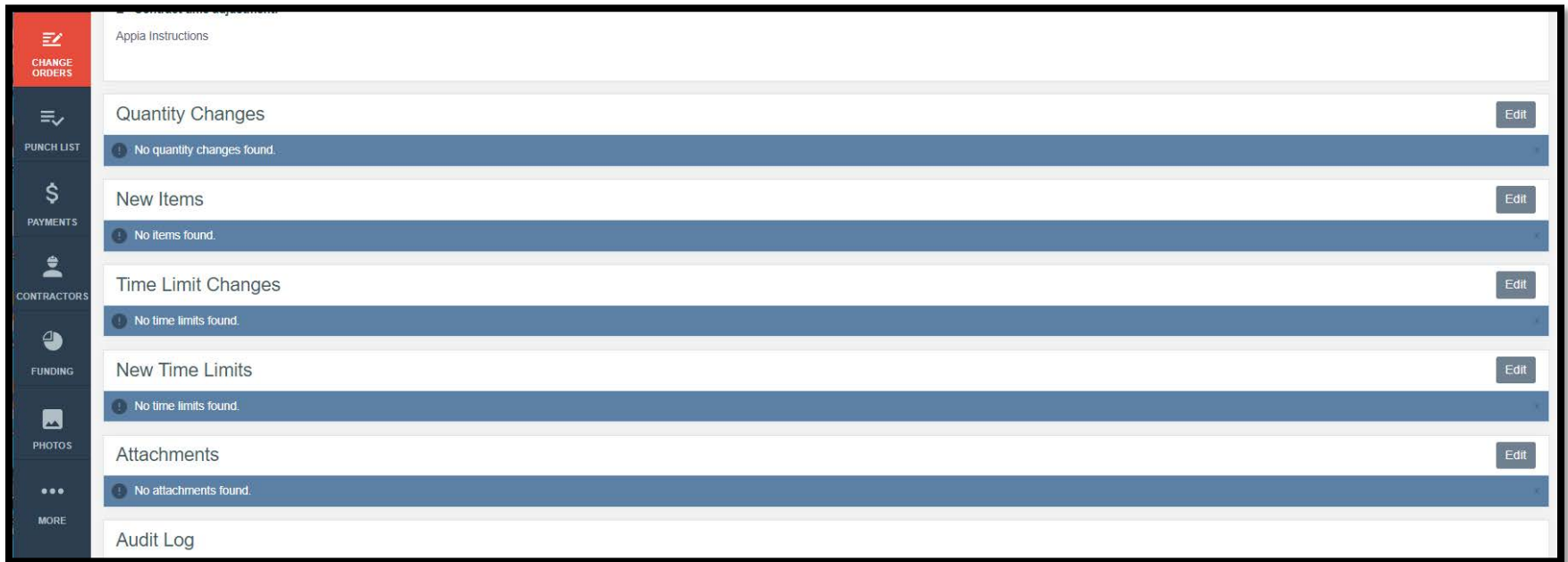
Edit

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

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

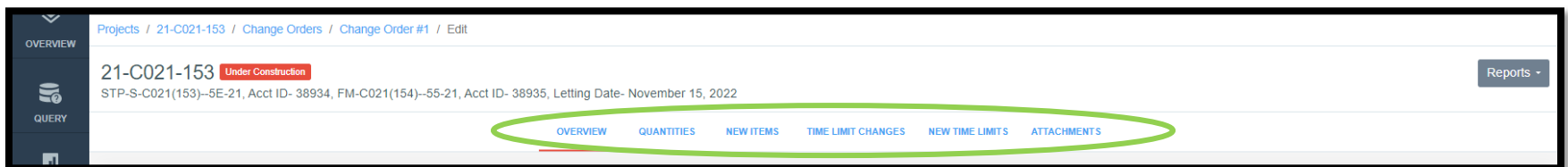
D. Numerical Values Change Order Entry Screen

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



This screenshot shows the 'CHANGE ORDERS' interface. On the left is a vertical sidebar with icons for 'CHANGE ORDERS', 'PUNCH LIST', 'PAYMENTS', 'CONTRACTORS', 'FUNDING', 'PHOTOS', and 'MORE'. The main content area is divided into several sections, each with a title and an 'Edit' button: 'Quantity Changes' (No quantity changes found), 'New Items' (No items found), 'Time Limit Changes' (No time limits found), 'New Time Limits' (No time limits found), 'Attachments' (No attachments found), and 'Audit Log'.

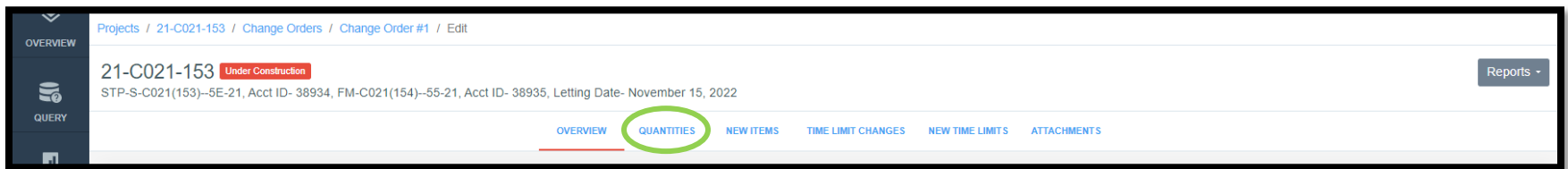
View of tabs in edit mode



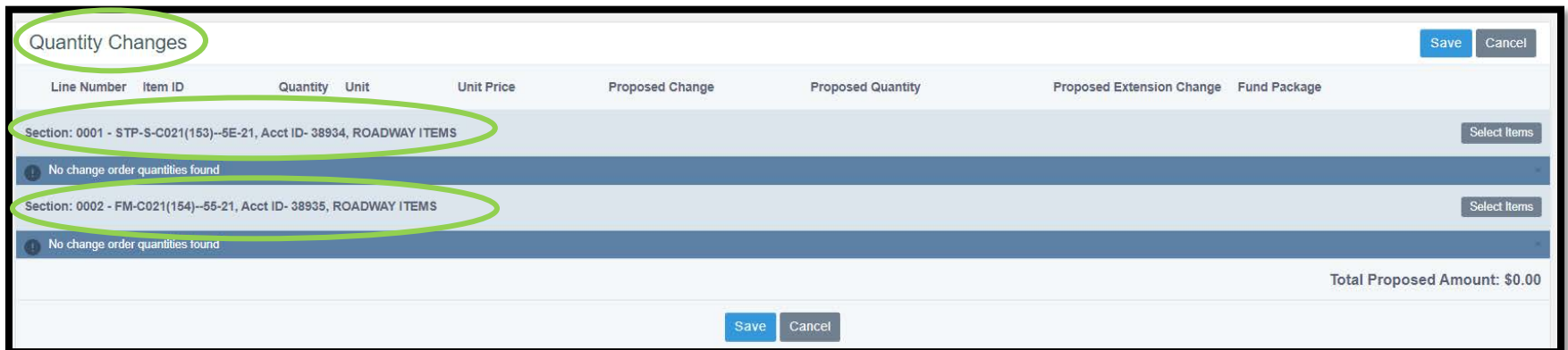
This screenshot shows the 'Edit' view of a change order. The breadcrumb trail at the top reads 'Projects / 21-C021-153 / Change Orders / Change Order #1 / Edit'. Below this, the project name '21-C021-153' is displayed with a red 'Under Construction' status tag. A detailed description follows: 'STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022'. At the bottom, a row of tabs is visible: 'OVERVIEW', 'QUANTITIES', 'NEW ITEMS', 'TIME LIMIT CHANGES', 'NEW TIME LIMITS', and 'ATTACHMENTS'. The 'OVERVIEW' tab is currently selected and highlighted with a green oval.

1) Quantity Changes / Quantities Tab (Edit Mode)

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



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



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

Quantity Changes

Save

Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS								
<div>No change order quantities found</div>								
<div>Select Items</div>								
Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS								
<div>No change order quantities found</div>								
<div>Select Items</div>								
								Total Proposed Amount: \$0.00
<div><div>Save</div><div>Cancel</div></div>								

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

Change Project Items

Search for Line Number, Item ID, Description and Unit

Search

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

Add Items

Cancel

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

Change Project Items

Search for Line Number, Item ID, Description and Unit

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

2 Item(s)

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

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

Quantity Changes

Section: 0001 - S P-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS

Line Number	Item ID	Quantity	Unit	Unit Price	Proposed Change	Proposed Quantity	Proposed Extension Change	Fund Package
0030	2214-5145150	74,947.000	SY	\$1.350	0.000	74,947.000	\$0.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153
PAVEMENT SCARIFICATION					Reason:			
0060	2301-9091000	6.000	EACH	\$25.000	0.000	6.000	\$0.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153
RUMBLE STRIP PANEL (PCC SURFACE)					Reason:			

Displaying all 2 change order quantities

Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS

No change order quantities found

Total Proposed Amount: \$0.00

Save Cancel

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

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

\$

OVERVIEW

QUANTITIES

NEW ITEMS

TIME LIMIT CHANGES

NEW TIME LIMITS

ATTACHMENTS

Quantity Changes

Save Cancel

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

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

The screenshot displays the 'Quantity Changes' section of a software interface. It features a table with columns: Line Number, Item ID, Quantity, Unit, Unit Price, Proposed Change, Proposed Quantity, Proposed Extension Change, and Fund Package. Two line items are visible:

- Line 0030:** Item ID 2214-5145150, Quantity 74,947.000, Unit SY, Unit Price \$1.350. The 'Proposed Change' is -120.000, and the 'Proposed Quantity' is 74,827.000. The 'Proposed Extension Change' is -\$162.00. The 'Fund Package' dropdown is highlighted with a green oval, showing options: 21-C021-153-CAT-1, 21-C021-153-CAT-1, and 21-C021-153. A blue 'Split' button is visible to the right.
- Line 0060:** Item ID 2301-9091000, Quantity 6.000, Unit EACH, Unit Price \$25.000. The 'Proposed Change' is 3.000, and the 'Proposed Quantity' is 9.000. The 'Proposed Extension Change' is \$75.00. The 'Fund Package' dropdown is also highlighted with a green oval, showing the same three options. A blue 'Split' button is visible to the right.

Below the table, there is a section for 'Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS' which displays 'No change order quantities found'. At the bottom right, the 'Total Proposed Amount' is -\$87.00. The interface includes a sidebar on the left with navigation options like 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', 'TIME LIMITS', 'CHANGE ORDERS', 'PUNCH LIST', and a 'Save' button at the bottom.

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

This screenshot shows the top section of the software interface. On the left, there is a sidebar with 'STOCKPILES' and 'TIME LIMITS' icons. The main area displays item details: '0060', '2301-9091000', '6.000 EACH', '\$25.000', and a '3.000' input field. To the right, there is a '9.000' input field, '\$75.00', and a dropdown menu showing '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153'. A blue 'Split' button with a red 'x' icon is circled in green. Below the item details, there is a 'Reason' section with a text input field.

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

This screenshot shows the interface after clicking the 'Split' button. The '3.000' input field is circled in green. Below the item details, there are three input fields for fund packages: '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153' with a value of '2.000' (circled in green), '001 CLAY CO FM 21-C021-154' with a value of '0.000' (circled in green), and '001 CLAY CO LOCAL 21-C021-153' with a value of '1.000' (circled in green). A 'Reset' button with a red 'x' icon is visible in the top right corner.

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

This screenshot shows the interface after clicking the 'Split' button. The '3.000' input field is circled in green. Below the item details, there are three input fields for fund packages: '21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153' with a value of '2.000', '001 CLAY CO FM 21-C021-154' with a value of '0.000', and '001 CLAY CO LOCAL 21-C021-153' with a value of '1.000'. A 'Reset' button with a red 'x' icon is visible in the top right corner.

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

DAILY ACTIVITIES
ITEMS

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

Select Items

0010	2110-3825010	760.000	TON	\$7.900	20.000	780.000	\$158.00	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	Split
------	--------------	---------	-----	---------	--------	---------	----------	---	-------

GRANULAR MATERIAL

Reason

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

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

Quantity Changes

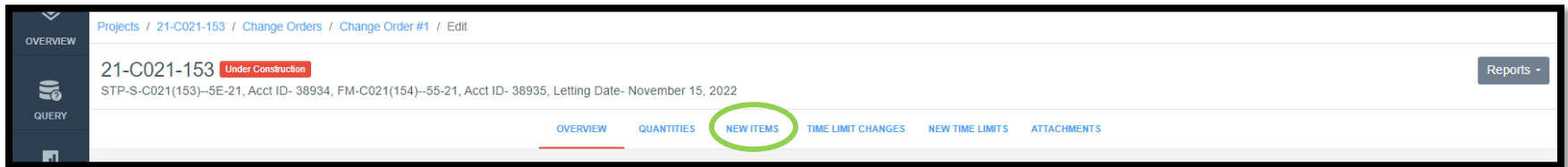
Save

Cancel

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

2) New Items / New Items (Edit Mode)

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



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

The screenshot shows the 'New Items' data entry screen. The title 'New Items' is circled in green. The screen displays a table with columns: Line Number, Item ID, Quantity, Unit, Unit Price, Extension, and Fund Package. There are two sections listed, each with an 'Add Items' button. The first section is 'Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1'. The second section is 'Section: 0002 - HDP-C031(110)--6B-31, Acct ID- 38572, ROADWAY ITEMS'. Below the sections, there's a 'Total Proposed Amount: \$0.00' and 'Save' and 'Cancel' buttons. The 'In dollars?' toggle is set to 'NO'.

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

New Items

In dollars? ☐ NO ☒ YES Save Cancel

Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS						
<div><div>No items found</div><div>Add Items</div></div>						
Section: 0002 - FM-C021(154)--55-21, Acct ID- 38935, ROADWAY ITEMS						
<div><div>No items found</div><div>Add Items</div></div>						
						Total Proposed Amount: \$0.00
<div>Save Cancel</div>						

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

Add Item(s) to Section

Collection: Iowa DOT Reference Data Collection (Current)

Search for Item ID, Description and Unit
Search

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

0 Item(s)
Add Items
Cancel

1
2
3
4
5
...
Next >
Last »

Displaying items 1 - 30 of 4712 in total

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

Add Item(s) to Section

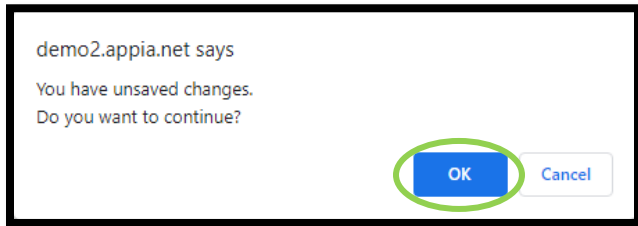
Collection: Iowa DOT Reference Data Collection (Current)

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

3 Item(s)

Add items to any/all sections desired.

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



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

New Items

In dollars? ☐ NO
Save Cancel

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

No items found ✕

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

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

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

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

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

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

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

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

New Items

In dollars?

NO

Save

Cancel

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

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

This screenshot shows a single line item in the Appia system. The line number is 8020, the project is 2102-2625000, and the quantity is 350.700. The currency is CY and the amount is \$15,000. The total amount is \$5,260.50. The funding packages are 31-2100-702-CAT-1, 31-2100-702-CAT-1, and 31-2100-702. The item description is EMBANKMENT-IN-PLACE. A blue 'Split' button with a red 'x' icon is circled in green on the right side of the line.

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

This screenshot shows the Appia interface after the 'Split' button was clicked. The main item entry line now has a quantity of 350.700 (circled in green). Below the main line, there are three funding package lines. The first line is 31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702, with a quantity of 250.700 (circled in green). The second line is 31-2100-702-CAT-2 31-2100-702-CAT-2 31-2100-702, with a quantity of 100.000 (circled in green). The third line is 31-C031-110-CAT-1 31-C031-110-CAT-1 31-C031-110, with a quantity of 0.000 (circled in green). The 'Split by 3 packages' button is visible, and a 'Reset' button is in the top right corner.

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

New Items

In dollars?

NO

Save

Cancel

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

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

8020	2102-2625000	350.700	CY	\$15.000	\$5,260.50	Split by 3 packages	Reset
EMBANKMENT-IN-PLACE				Reason <input type="text"/>			
31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702				31-2100-702-CAT-2 31-2100-702-CAT-2 31-2100-702			
<input type="text" value="250.700"/>				<input type="text" value="100.000"/>			
31-C031-110-CAT-1 31-C031-110-CAT-1 31-C031-110							
<input type="text" value="0.000"/>							

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

8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702	Split
INTERCEPTING DITCHES AND FLUMES				Reason <input type="text"/>			

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

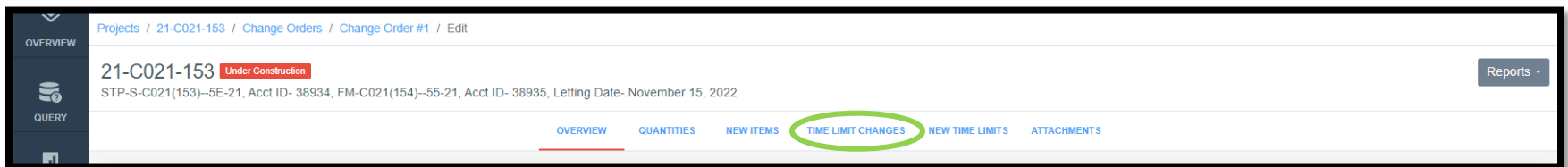
New Items

In dollars? ☐ NO ☒ YES Save Cancel

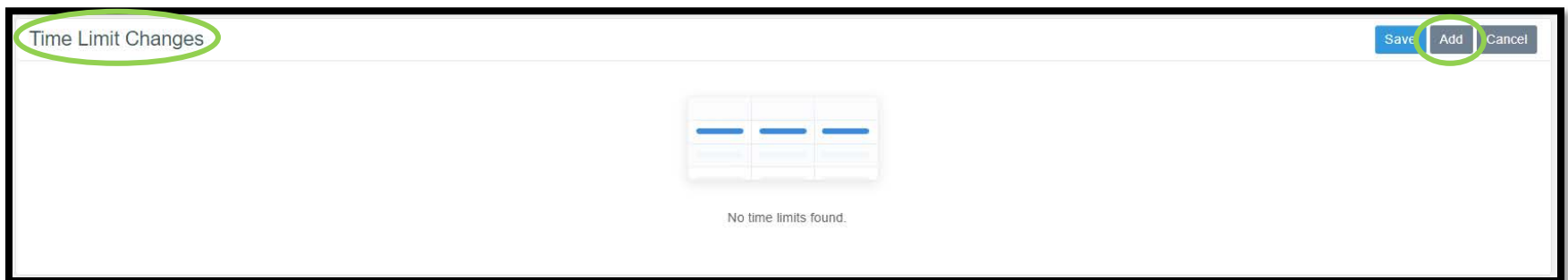
Line Number	Item ID	Quantity	Unit	Unit Price	Extension	Fund Package
Section: 0001 - STBG-SWAP-2100(702)--SG-31, Acct ID- 38573, ROADWAY ITEMS Division 1 Add Items						
8010	2102-2200000	160.000	LF	\$200.000	\$32,000.00	31-2100-702-CAT-1 31-2100-702-CAT-1 31-2100-702 Split ✕
INTERCEPTING DITCHES AND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

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

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



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



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

The screenshot shows a window titled "Add Time Limit(s)". At the top is a search bar with the placeholder text "Search for Description and Type" and a "Search" button. Below the search bar is a table with three columns: "Description", "Deadline", and "Days Charged". The table contains one row with the following data: "Working Days, Late Start Date - 05/22/2023, Liquidated Damage Rate - 1,600", "80.0 Working Days", and "0". Below the table, it says "Displaying 1 time limits". At the bottom left, it says "0 Time Limits(s)". At the bottom right, there are two buttons: "Add Time Limits" (which is grayed out and circled in green) and "Cancel".

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

Displaying 1 time limits

0 Time Limits(s)

Add Time Limits Cancel

View with multiple time limits

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

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

Displaying all 2 time limits

0 Time Limits(s)

Add Time Limits Cancel

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

Add Time Limit(s)

Search for Description and Type Search

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

Displaying 1 time limits

1 Time Limits(s)

Add Time Limits Cancel

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

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

OVERVIEW QUANTITIES NEW ITEMS TIME LIMIT CHANGES NEW TIME LIMITS ATTACHMENTS

Time Limit Changes Save Add Cancel

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

Displaying 1 time limit

Save Add

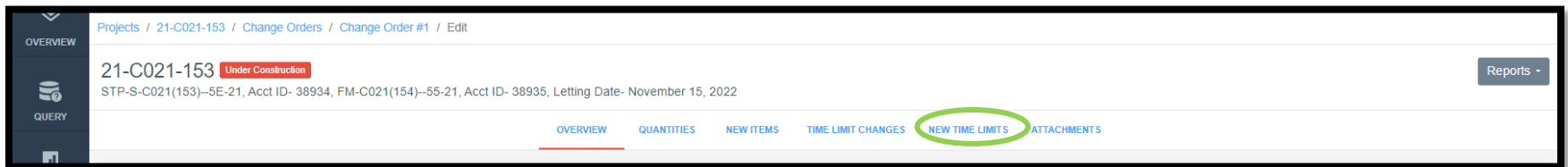
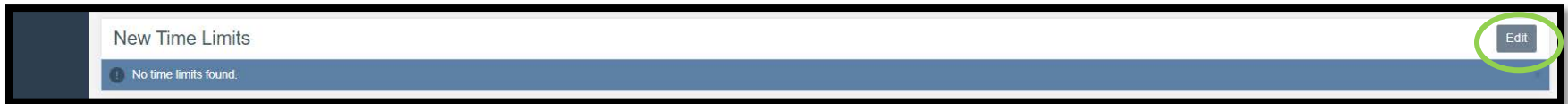
In the “Deadline Extension” field, enter a value reflecting the amount the existing time limit is to be changed. For example, if three working days are being added, enter “3.0”. The value entered may be either positive or negative (an increase or a reduction in days). The “New Deadline” field will automatically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

The screenshot shows a web application interface for managing time limits. On the left is a dark sidebar with icons for 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', and 'ITEMS'. The main area has a top navigation bar with tabs: 'OVERVIEW', 'QUANTITIES', 'NEW ITEMS', 'TIME LIMIT CHANGES' (which is active), 'NEW TIME LIMITS', and 'ATTACHMENTS'. Below the tabs is a header 'Time Limit Changes' with 'Save', 'Add', and 'Cancel' buttons on the right. A table with the following columns is displayed: 'Type', 'Authorized Deadline', 'Days Charged', '* Deadline Extension', 'New Deadline', and 'Reason'. The first row contains 'Working Days', '80.0 Days', '0.0 Days', a text input field containing '2.0', '82.0 Days', and an empty text input field. Below the table, it says 'Displaying 1 time limit'. At the bottom center, there are 'Save' and 'Add' buttons.

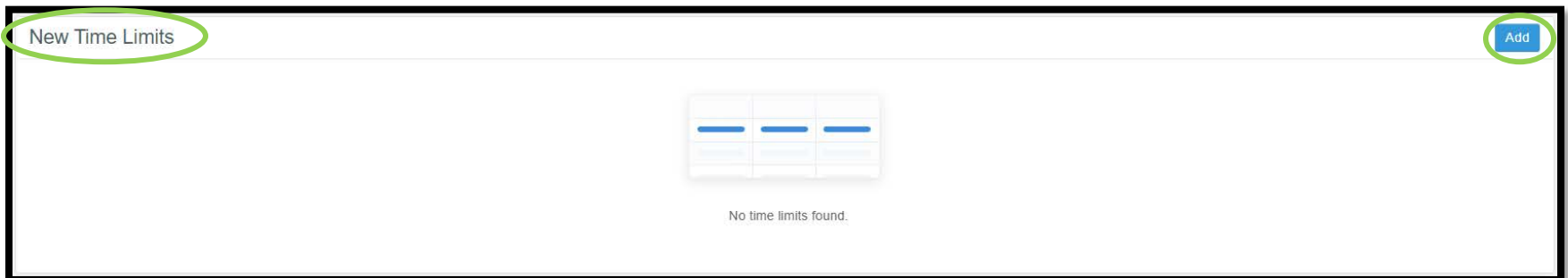
Type	Authorized Deadline	Days Charged	* Deadline Extension	New Deadline	Reason
Working Days	80.0 Days	0.0 Days	2.0	82.0 Days	

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

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



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



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

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

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

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

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

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

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

Calendar Day example – Overall contract limit

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

Calendar Day example – Site time only

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

Completion Date example

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

Working Days example

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

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

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

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

21-C021-153 Under Construction

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

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

New Time Limits

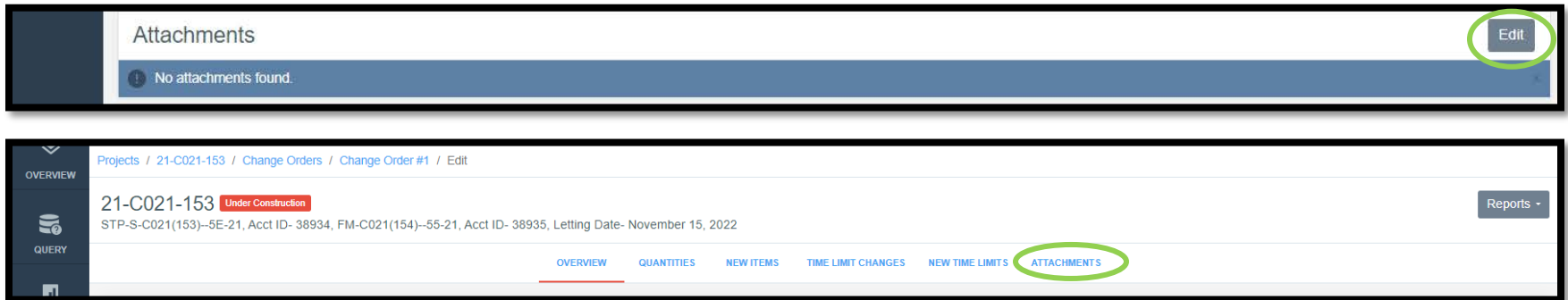
Add

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

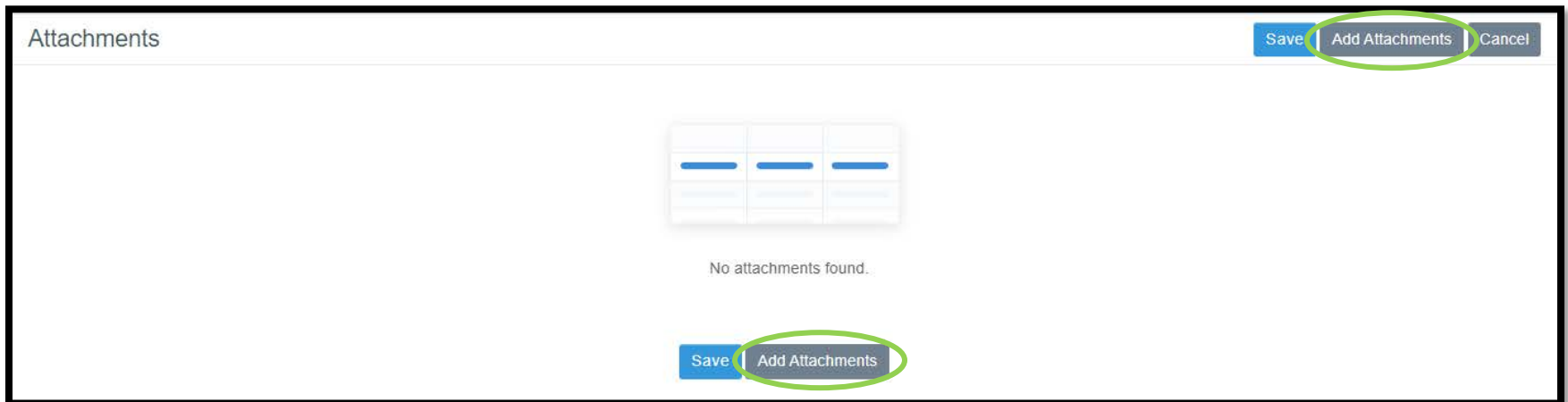
Displaying 1 time limits

5) Attachments / Attachments (Edit Mode)

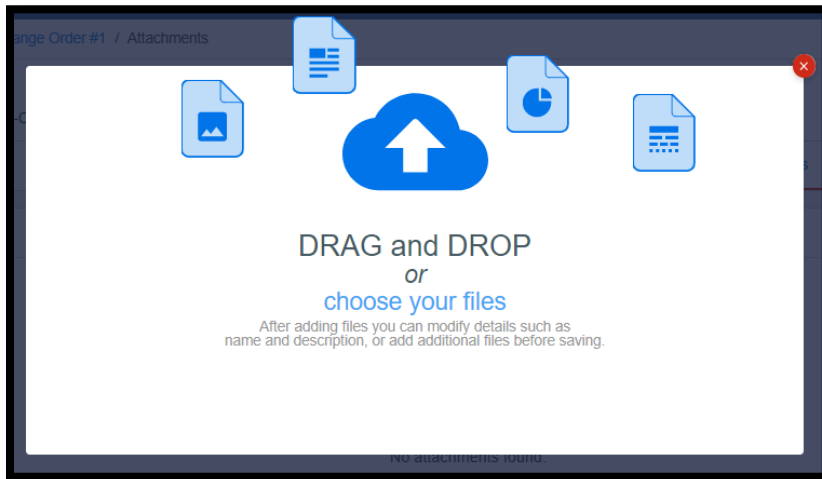
Attachments may be added to a change order. They can be downloaded for viewing. The printed change order report will show that files were attached to the change order, but the attachments themselves will not print/display in the change order report. To add an attachment to a change order, click the gray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



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

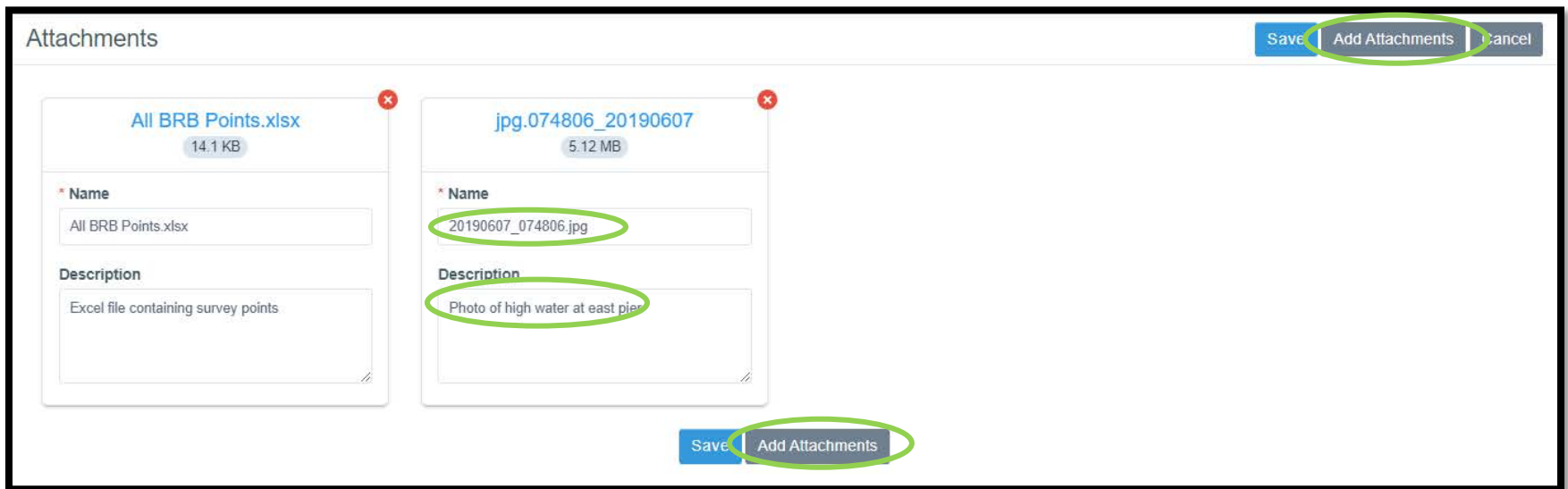
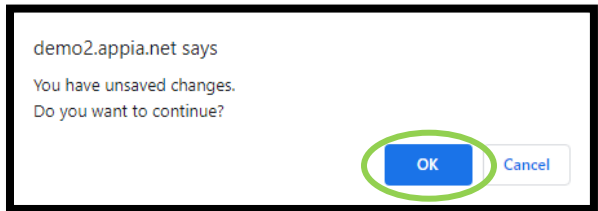


An upload window will pop up with a message saying, “DRAG and DROP or choose your files”. Either drag the desired file from an open windows explorer file to this box or click on “choose your files” to navigate to the desired file. Any file type/size is acceptable.



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

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



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

Attachments

[Save](#) [Add Attachments](#) [Cancel](#)

All BRB Points.xlsx
14.1 KB

*** Name**
All BRB Points.xlsx

Description
Excel file containing survey points

jpg.074806_20190607
5.12 MB

*** Name**
20190607_074806.jpg

Description
Photo of high water at east pier

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

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

Attachments [Edit](#)

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

Displaying all 2 attachments

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

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

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

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

21-C021-153 Under Construction

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

Submit For ApprovalActionsReports

Change OrderEdit

Date Created02/21/2023

Summary

DescriptionAppia Instructions

B - Reason for change:Appia Instructions

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

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

E - Contract time adjustment:Appia Instructions

StatusDraft

TypeNon-Significant - Federal-aid Participating



Total Proposed Amount\$26,713.00

<

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

Time Limit Changes					Edit
Type	Original Deadline	Current Deadline	Proposed Extension	Proposed Deadline	
Working Days	80.0 Days	80.0 Days	2.0 Days	82.0 Days	

New Time Limits			Edit
Description	Liquidated Damages per Day	Deadline	
Working Days, Late Start Date - 03/12/2024, Liquidated Damage Rate - 1,500	\$0.00	40.0 Working Days	
Displaying 1 time limits			

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

E. Producing a PDF of the Change Order

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

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

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

The screenshot shows the 'Change Order' screen for project 17-C017-035, which is 'Under Construction'. The status is 'Draft'. The 'Reports' pull-down menu in the top right corner is circled in green. The 'Status' field in the table below is also circled in green.

Date Created	Status
10/29/2025	Draft

Summary	Type
	Substantial

Description	Total Proposed Amount


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

The screenshot shows the 'Change Order' screen with the 'Reports' pull-down menu open. The 'Change Order Details' option is selected and circled in green. The 'Status' field in the table below is also circled in green.

Date Created	Status
10/29/2025	Draft

Summary	Type
	Substantial

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



Iowa Local Systems _ DEMO ACCOUNT

Change Order Details

21-C021-153

Description	STP-S-C021(153)--5E-21, Acct ID- 38934, FM-C021(154)--55-21, Acct ID- 38935, Letting Date- November 15, 2022
Prime Contractor	CEDAR VALLEY CORP., LLC. 2637 WAGNER ROAD WATERLOO, IA
Change Order	1
Status	Draft
Date Created	02/21/2023
Type	Non-Significant - Federal-aid Participating
Change Order Description	Appia Instructions
Awarded Project Amount	\$4,553,445.96
Authorized Project Amount	\$4,553,445.96
Change Order Amount	\$26,713.00
Revised Project Amount	\$4,580,158.96

B - Reason for change:

Appia Instructions

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

Appia Instructions

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

Change Order Details:
21-C021-153

02/22/2023
Page 1 of 4

Appia Instructions

E - Contract time adjustment:

Appia Instructions

Increases/Decreases

Line Number	Item ID	Unit	Unit Price	Current		Change		Revised	
				Quantity	Amount	Quantity	Amount	Quantity	Amount
Section: 0001 - STP-S-C021(153)–5E-21, Acct ID- 38934, ROADWAY ITEMS									
0030	2214-5145150	SY	\$1.350	74,947.000	\$101,178.45	-120.000	-\$162.00	74,827.000	\$101,016.45
PAVEMENT SCARIFICATION									
				Funding Details					
		001 CLAY CO FM 21-C021-154		0.000	\$0.00	0.000	\$0.00	0.000	\$0.00
		001 CLAY CO LOCAL 21-C021-153		0.000	\$0.00	0.000	\$0.00	0.000	\$0.00
		21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		74,947.000	\$101,178.45	-120.000	-\$162.00	74,827.000	\$101,016.45
0060	2301-9091000	EACH	\$25.000	6.000	\$150.00	3.000	\$75.00	9.000	\$225.00
RUMBLE STRIP PANEL (PCC SURFACE)									
				Funding Details					
		001 CLAY CO FM 21-C021-154		0.000	\$0.00	0.000	\$0.00	0.000	\$0.00
		001 CLAY CO LOCAL 21-C021-153		0.000	\$0.00	1.000	\$25.00	1.000	\$25.00
		21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153		6.000	\$150.00	2.000	\$50.00	8.000	\$200.00
2 items			Totals		\$101,328.45		-\$87.00		\$101,241.45

Change Order Details:

21-C021-153

02/22/2023

Page 2 of 4

New Items

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

Funding Summary

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

Change Order Details:
21-C021-153

02/22/2023
Page 3 of 4

Time Limit Changes

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

New Time Limits

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

Attachments

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

Change Order Details:
21-C021-153

02/22/2023
Page 4 of 4

F. Approval Process for Change Orders

City Projects

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

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

County Projects NOT on the Farm-to-Market System

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

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

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

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

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

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

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

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

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

The screenshot displays the Appia interface for a Change Order. On the left is a dark sidebar with navigation options: OVERVIEW, QUERY, ALL REPORTS, and a calendar icon. The main content area has a breadcrumb trail: Projects / 08-C008-089 / Change Orders / Change Order #2. Below this, the project ID '08-C008-089' is shown with a red 'Under Construction' tag. To the right are buttons for 'Submit for Approval' (marked with a red X), 'Actions', and 'Reports'. Further down, the change order details are shown: 'Date Created' is 01/12/2024 and 'Status' is Draft. At the bottom, a 'Summary' section is partially visible. An 'Edit' button is located in the top right corner of the change order details section.

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

The screenshot shows the 'Change Order #2' interface. The top navigation bar includes 'Projects / 08-C008-089 / Change Orders / Change Order #2'. The main header displays '08-C008-089' with a red 'Under Construction' tag and the text 'FM-C008(89)–55-08, Acct ID- 39638, Letting Date- March 12, 2023'. On the right, there are buttons for 'Submit For Approval', 'Actions', and 'Reports'. A dropdown menu is open under 'Submit For Approval', showing 'Submit in Appia' (highlighted with a green circle) and 'Submit to Doc Express'. Below this is an 'Edit' button. The main content area is titled 'Change Order' and contains a table with the following data:

Date Created	Status
01/12/2024	Draft

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



The screenshot shows the 'Change Order #2' interface after the status change. The top navigation bar and header information remain the same. The 'Submit For Approval' dropdown menu is no longer open. The 'Status' in the table is now 'Pending' (highlighted with a green circle). The 'Type' column is still empty.

Date Created	Status
01/12/2024	Pending

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

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

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

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

Date Created	Status	Type
02/21/2023	Pending	Summary

Are you sure you wish to approve the change order?

⚠ You are about to **approve** this change order. Once a change order has been approved, it may be unapproved **only** by your system administrator under the conditions specified in the help text.

⚠ The change order approval date must be on or before the payment end date in order to include these changes.

* Approval Date

Approve Cancel

QUERY

ALL REPORTS

DAILY ACTIVITIES

21-C021-153

Under Construction

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

Undo Approval

Reports

Change Order

Approval Date

02/08/2023

Summary

Status

Approved

Type

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

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

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

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

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

The screenshot displays the Appia project interface for project 21-C021-153, which is marked as "Under Construction". The interface includes a sidebar with navigation options: QUERY, ALL REPORTS, and DAILY ACTIVITIES. The main content area shows the "Change Order" details, including the project ID, a status tag "Under Construction", and a "Submit for Approval" button with a red X icon. Below this, there is a table with columns for Date Created, Status, and Type. The table contains one row with the following data: Date Created: 02/21/2023, Status: Draft, and Type: Summary. An "Edit" button is located in the top right corner of the table.

Date Created	Status	Type
02/21/2023	Draft	Summary

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

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

08-C008-089 Under Construction

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

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

[Submit in Appia®](#)

[Submit to Doc Express®](#)

Edit

Change Order

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

Quantity Changes

Edit

No quantity changes found.

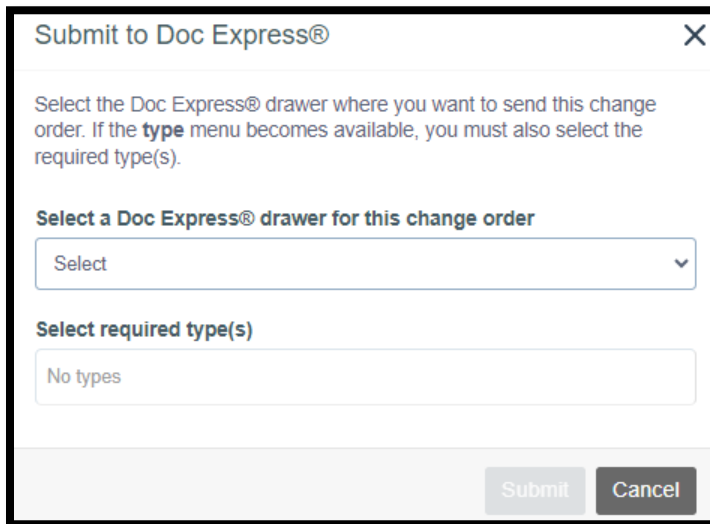
New Items

Edit

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

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

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



Submit to Doc Express®

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

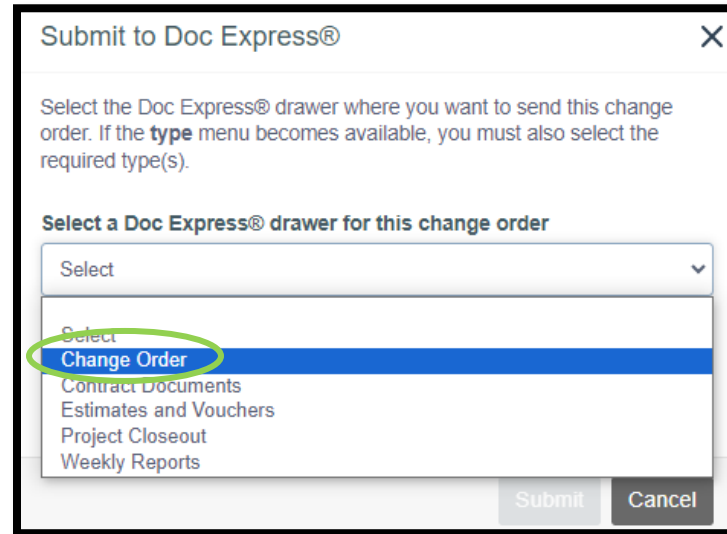
Select a Doc Express® drawer for this change order

Select

Select required type(s)

No types

Submit Cancel



Submit to Doc Express®

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

Select a Doc Express® drawer for this change order

Select

Change Order

Contract Documents

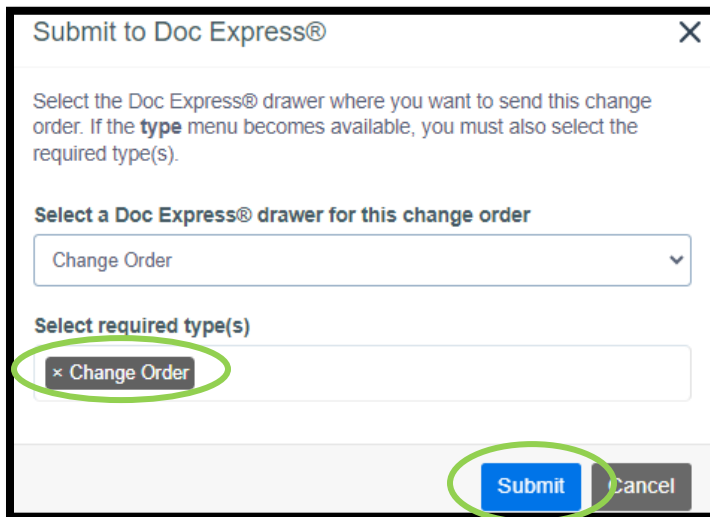
Estimates and Vouchers

Project Closeout

Weekly Reports

Submit Cancel

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



Submit to Doc Express®

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

Select a Doc Express® drawer for this change order

Change Order

Select required type(s)

x Change Order

Submit Cancel

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

The screenshot displays a software interface with a green success banner at the top. Below the banner is a blue navigation bar with a warning icon and the text "Doing business as Iowa Local Systems _DEMO ACCOUNT. [Switch to another business?](#)". The breadcrumb trail reads "Projects / 17-C017-035 / Change Orders / Change Order #5". The main header shows "17-C017-035" with a red "Under Construction" tag, and "BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024". Action buttons for "Approve", "Actions", and "Reports" are on the right. The "Change Order" section contains fields for "Date Created" (10/29/2025), "Summary", "Description" (8001 - For automated payment process in Appia instructions), "Status" (Pending), "Type" (Substantial), and "Total Pending Amount" (\$12,000.00). The "Doc Express® Information" section, timestamped "as of 10/29/2025 11:20 AM EDT", includes "Document Name" (change_order-05-20251029 - [View in Doc Express](#)), "Date Submitted to Doc Express" (10/29/2025), "Doc Express Status" (Submit), and "Doc Express Type(s)" (Change Order). A "New Items" table at the bottom has columns for Line Number, Item ID, Unit, Quantity, Unit Price, and Extension.

Change Order

Date Created 10/29/2025	Status Pending
Summary	Type Substantial
Description 8001 - For automated payment process in Appia instructions	Total Pending Amount \$12,000.00

Doc Express® Information as of 10/29/2025 11:20 AM EDT

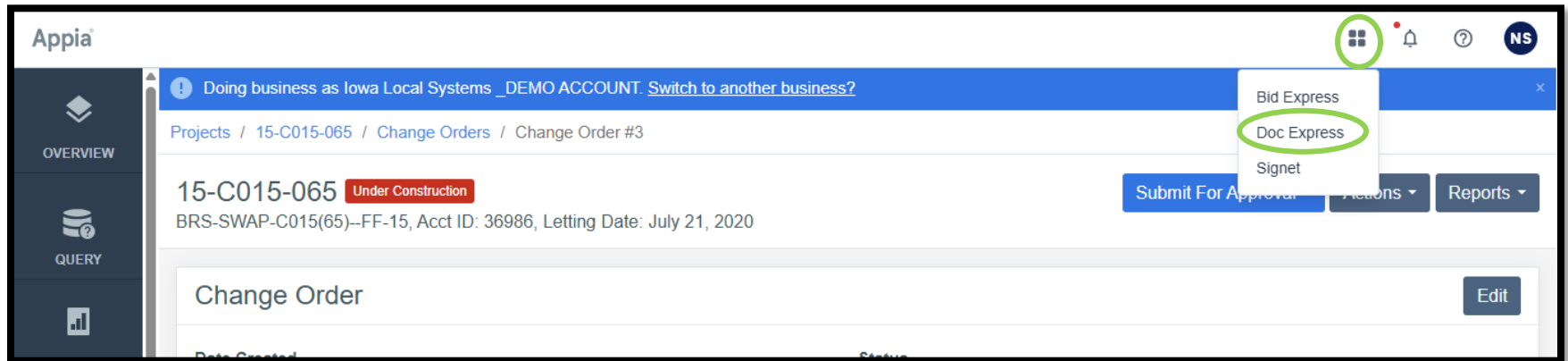
Document Name change_order-05-20251029 - View in Doc Express	Date Submitted to Doc Express 10/29/2025	Doc Express Status Submit
Doc Express Type(s) Change Order		

New Items

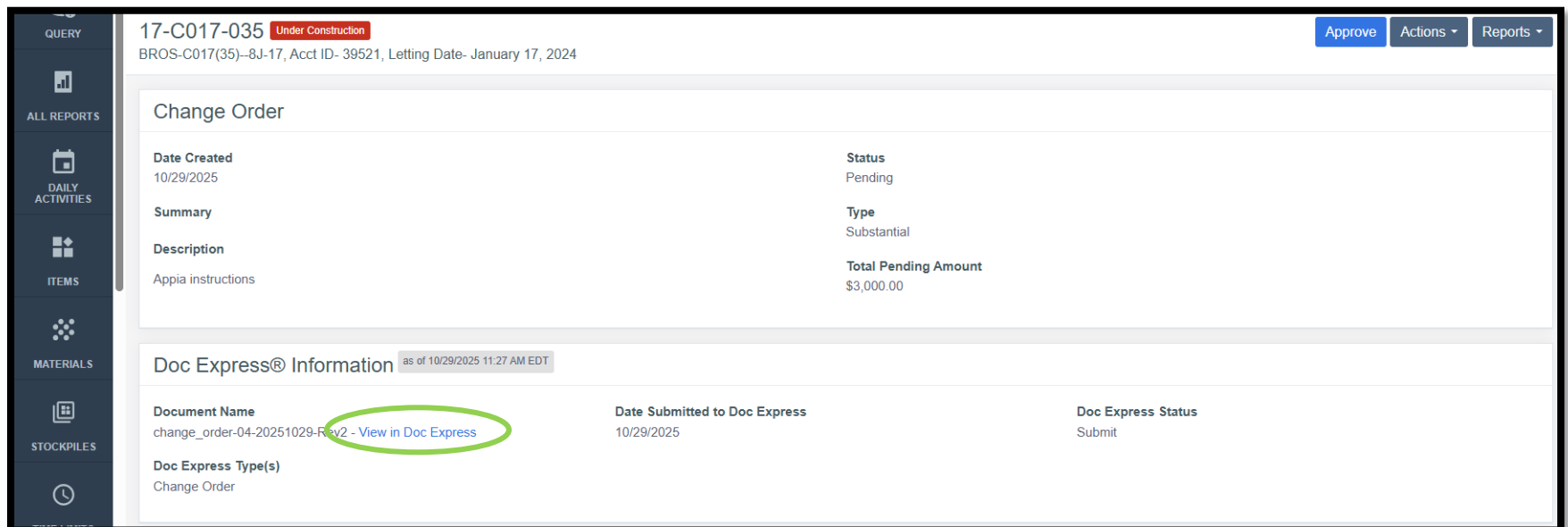
Line Number	Item ID	Unit	Quantity	Unit Price	Extension
-------------	---------	------	----------	------------	-----------

At this point, the document needs to be signed and transitioned in Doc Express by the appropriate people (engineer, PIRC, etc.). Navigate to Doc Express to complete the transition and signature process. You can navigate to Doc Express by either opening a new browser tab and going to

the Doc Express website, by clicking on the four-square box in the upper, right corner of the Appia screen and selecting Doc Express, or by clicking on the View Doc Express link found in the Doc Express Information section on the Change Order screen in Appia.



or



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

Change Order

08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacement - Twin Box |

change_order-1-20231207 Change Order update

Iowa Local Systems _DEMO ACCOUNT

0 comments 0 supporting documents

Dec 07 2023 05:41 PM EST Submit Version 1 (current) Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn

Submit Document Actions

Submit

Transition / Actions

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

Contracts / 08-C008-089 / Change Order

Search for documents

Change Order

08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacement - Twin Box |

change_order-1-20231207 Change Order update

Iowa Local Systems _DEMO ACCOUNT

0 comments 0 supporting documents

Jan 12 2024 07:08 PM EST Title changed from change_order-1-20231207-Rev1 to change_order-1-20231207 Document Title changed from change_order-1-20231207-Rev1 to change_order-1-20231207. Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn

Submit Document Actions

Submit

Transition / Actions

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

Change Order

Transition CO 01

* Status

Comment

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

Save Cancel

Change Order

Transition CO 01

* Status

Recommended by Engineer / Approved

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

Save Cancel

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

The screenshot shows a software window titled "Transition CO 01" with a red close button in the top right corner. Inside the window, there is a "Status" dropdown menu currently set to "Recommended by Engineer / Approved". Below this is a "Comment" text area. Further down, under the heading "Supporting Documents", is a link that says "Add a supporting document?". A large, light gray box with the text "Sign this document" is prominently displayed. Below this box is a checkbox with the text: "By checking this box and entering my name above, I am electronically signing the attached document." At the bottom of the window, there is another checkbox labeled "Transition document to final status of Completed?", followed by "Save" and "Cancel" buttons.

Transition CO 01

* Status
Recommended by Engineer / Approved

Comment

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

Sign this document

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

☐ Transition document to final status of **Completed**? Save Cancel

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

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

The screenshot shows a web form titled "Transition CO 01". It includes a "Status" dropdown menu set to "Recommended by Engineer / Approved", a "Comment" text area, and a "Supporting Documents" section with a link "Add a supporting document?". Below these is a signature box containing the name "Nicole Stinn". Under the signature box is a checkbox with the text "By checking this box and entering my name above, I am electronically signing the attached document." At the bottom is another checkbox labeled "Transition document to final status of Completed?". To the right of this checkbox are two buttons: a yellow "Save" button and a grey "Cancel" button. A green callout box on the left points to the "Transition document to final status of Completed?" checkbox with the text: "Check this box if no further signatures are required on the document. Otherwise, leave it un-checked." Green circles highlight the signature box, the first checkbox, the "Completed?" checkbox, and the "Save" button.

Transition CO 01

* Status
Recommended by Engineer / Approved

Comment

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

Nicole Stinn

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

☐ Transition document to final status of Completed?

Save Cancel

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

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

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

Will not be sent to Finance!

This screenshot shows the 'Change Order' interface for 'CO 01'. The status is 'Recommended by Engineer / Approved', which is highlighted with a red oval. A red callout box points to this status with the text 'Will not be sent to Finance!'. The interface includes a 'Submit Document' button and an 'Actions' dropdown menu. The document is associated with 'Iowa Local Systems _DEMO ACCOUNT' and has '0 comments' and '0 supporting documents'. The timestamp is 'Dec 05:55 PM EST'.

This screenshot shows the 'Change Order' interface for 'CO 01' after it has been transitioned to 'Completed'. The 'Completed' status is highlighted with a green oval. The interface includes a 'Submit Document' button and an 'Actions' dropdown menu. The document is associated with 'Iowa Local Systems _DEMO ACCOUNT' and has '0 comments' and '0 supporting documents'. The timestamp is 'Dec 05:59 PM EST'.

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

Projects / 17-C017-035 / Change Orders / Change Order #5

17-C017-035

Under Construction

Approve

Actions

Reports

BROS-C017(35)--8J-17, Acct ID- 39521, Letting Date- January 17, 2024

Change Order

Date Created

10/29/2025

Summary

Description

8001 - For automated payment process in Appia instructions

Status

Pending

Type

Substantial

Total Pending Amount

\$12,000.00

Doc Express® Information

as of 10/29/2025 11:29 AM EDT

Document Name

change_order-05-20251029 - [View in Doc Express](#)

Date Submitted to Doc Express

10/29/2025

Doc Express Status

Completed

Doc Express Type(s)

Change Order

New Items

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

08-C008-089 Under Construction

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

Approve Actions Reports

Change Order

Date Created	Status
12/07/2023	Pending

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

Are you sure you wish to approve the change order?

! You are about to **approve** this change order. Once a change order has been approved, it may be unapproved **only** by your system administrator under the conditions specified in the help text. ×

! The change order approval date must be on or before the payment end date in order to include these changes. ×

* Approval Date

Approve Cancel

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

11 - Punch List

(Reserved for Punch List instructions)

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

12 - Payments

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

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

Overview Edit

General Information

Project
Work Type
RCB CULVERT REPLACEMENT - TWIN BOX

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

Management
Prime Contractor
DIXON CONSTRUCTION CO.
Created By
Douglas Heeren

Awarded Amount \$517,966.75

Authorized Amount \$517,966.75

Approved Changes \$0.00

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

Amount Paid

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

Important Dates

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

The screenshot shows a software interface for a project named "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The project's "Letting Date" is "October 21, 2014". The left sidebar contains navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, and ITEMS. The main content area is titled "Payments" and includes a sub-header "Issue final payment?". Below this, a message states "No payments found." accompanied by a small graphic of three empty boxes. A blue "Add" button is located in the top right corner, highlighted with a green circle.

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

The screenshot shows the same software interface, but now it displays a table of payments. The table has columns for "End Date", "Status", "Payment", "To Date", "% Complete", and "No.". A single payment record is shown with an "End Date" of "01/02/2019", a status of "Approved", a "Payment" amount of "\$7,338.05", a "To Date" of "\$7,338.05", and a "% Complete" of "0.5%". The "No." column shows the value "1". Below the table, it says "Displaying 1 payment". The blue "Add" button in the top right corner is again circled in green.

End Date	Status	Payment	To Date	% Complete	No.
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

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

A. Overview Tab

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

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

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

OVERVIEW EXCLUSIONS SUMMARY WORK PERFORMED STOCKPILES ATTACHMENTS

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

Edit Save Cancel

Payment Details

Payment Number	Percent Complete
2	9.0%
Payment Status	Item Payment Amount
Draft	\$29,500.00

Project Details

Prime Contractor
DIXON CONSTRUCTION CO.

Pay Period

* From Date	* To Date
10/05/2023	01/12/2024

Payment Dates

Approval Date	Payment Date

Retainage

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

Remarks

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

B. Exclusions of Daily Reports from Payments

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

LABS

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Submit For Approval Actions

OVERVIEW **EXCLUSIONS** SUMMARY WORK PERFORMED ATTACHMENTS

2 daily reports have been excluded from payment. See the [Exclusions section](#) for details.

Edit Save Cancel

Payment Details

Payment Number	Percent Complete
2	3.6%
Payment Status	Item Payment Amount
Draft	\$44,608.40

Project Details

Prime Contractor	Project Manager
PETERSON CONTRACTORS INC.	Nicole Stinn
Managing Office	
Tama County Highway Department	

Pay Period

* From Date	* To Date
01/03/2019	01/28/2019

Payment Dates

Approval Date	Payment Date

Retainage

Retain	Retainage Cap Amount
3.000%	\$30,000.00

[Edit Payment Cap Settings](#) Help

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

The screenshot shows a software interface with a sidebar on the left containing navigation options: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, and ITEMS. The main header area displays 'BROS-C086(60)--8J-86 - 31961' with a red 'Under Construction' tag, and a 'Submit For Approval' button. Below the header, a tabbed interface shows 'OVERVIEW', 'EXCLUSIONS' (highlighted with a green circle), 'SUMMARY', 'WORK PERFORMED', and 'ATTACHMENTS'. The 'EXCLUSIONS' tab displays a table titled 'Excluded Daily Reports'.

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

At the bottom of the table, it says 'Displaying all 2 daily reports'. The 'Status' column and the date '01/28/2019' are circled in green in the original image.

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

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

C. Summary Tab

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

OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

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

Submit For Approval Actions

Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEWEXCLUSIONS**SUMMARY**WORK PERFORMEDATTACHMENTS

Summary

SaveCancel

Adjustment

\$0.00

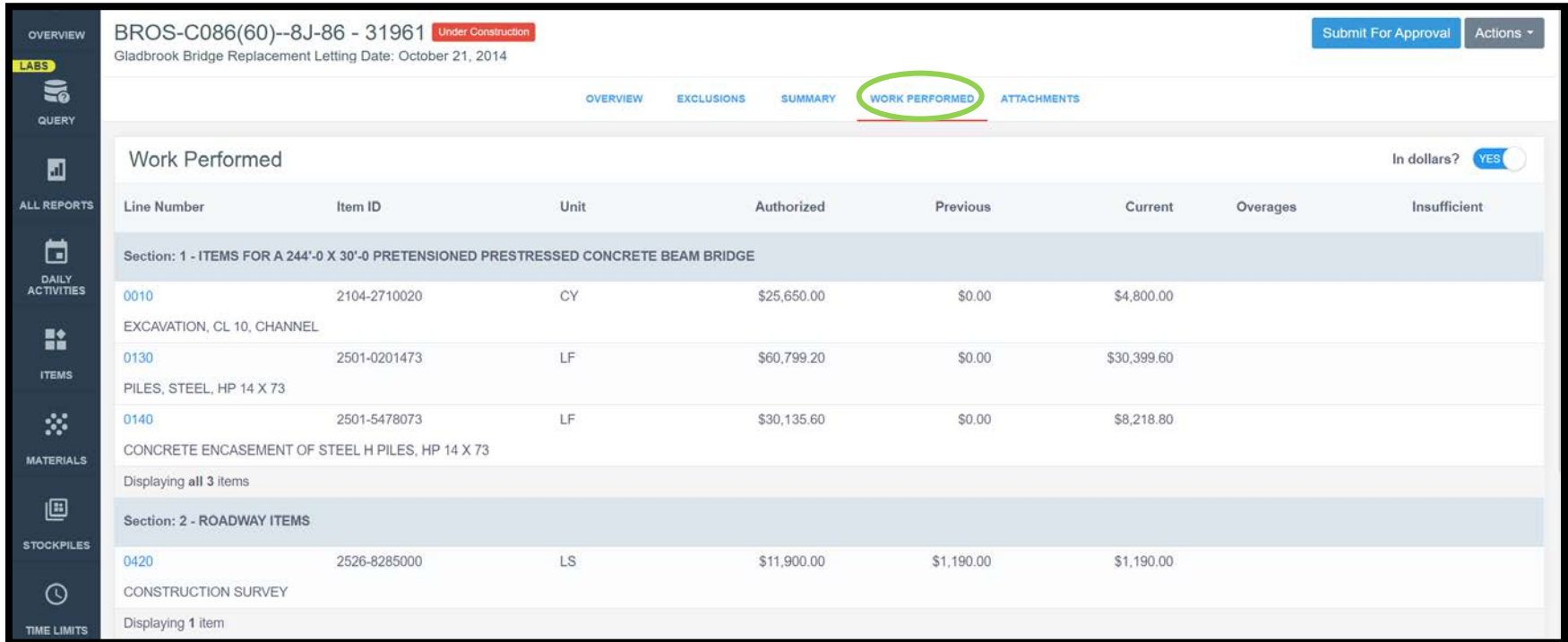
Adjustment Remarks

	Previous	Current	To Date
Credits			
Authorized Work	\$7,565.00	\$44,608.40	\$52,173.40
Stockpile Advancement	\$0.00	\$0.00	\$0.00
Reductions			
Stockpile Recovery	\$0.00	\$0.00	\$0.00
Retainage	\$226.95	\$1,338.25	\$1,565.20
Liquidated Damages	\$0.00	\$0.00	\$0.00
Payment			
Adjustment	\$0.00	\$0.00	\$0.00
Retainage Released	\$0.00	\$0.00	\$0.00
Totals	\$7,338.05	\$43,270.15	\$50,608.20

Help

D. Work Performed Tab

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



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

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW EXCLUSIONS SUMMARY **WORK PERFORMED** ATTACHMENTS

Work Performed In dollars? ☒

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

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

OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

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

Under Construction

Submit For Approval

Actions

Gladbrook Bridge Replacement Letting Date: October 21, 2014

OVERVIEW

EXCLUSIONS

SUMMARY

WORK PERFORMED

ATTACHMENTS

Work Performed

In dollars? YES

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

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

E. Stockpiles Tab

Any desired attachment can be added to your payment.

OVERVIEW

QUERY

ALL REPORTS

DAILY ACTIVITIES

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

08-C008-089 Under Construction

Submit For Approval

Actions

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

OVERVIEW

EXCLUSIONS

SUMMARY

WORK PERFORMED

STOCKPILES

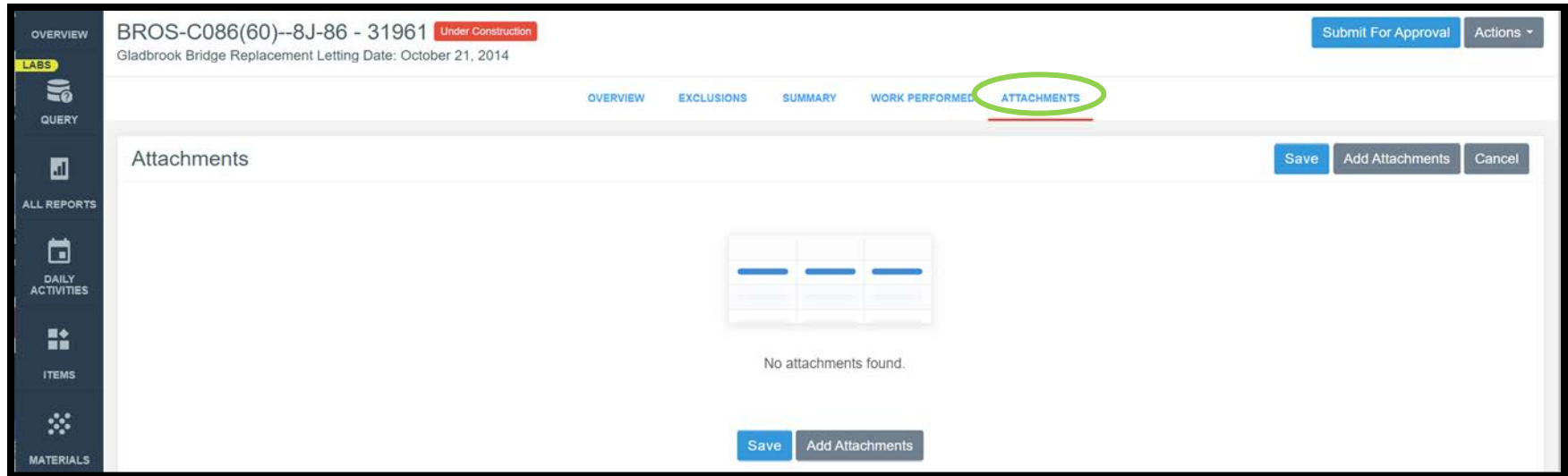
ATTACHMENTS

Stockpile Details

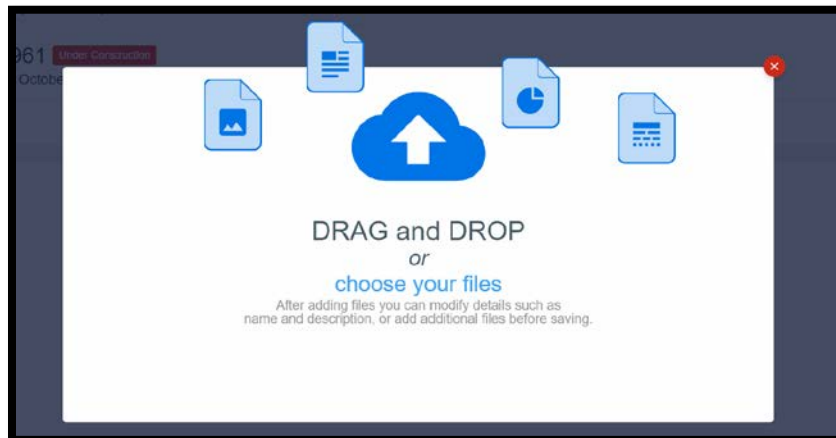
Stockpile	Advancement	Advancement To Date	Recovery	Recovery To Date
#1 2404-7775000 REINFORCING STEEL	\$20,000.00	\$20,000.00	\$0.00	\$0.00
Totals	\$20,000.00	\$20,000.00	\$0.00	\$0.00

F. Attachments Tab

Any desired attachment can be added to your payment.



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



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

Reimbursement Projects

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

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

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

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

Contractor Payment System (CPS) Projects

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

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

Appia Auto-Pay Projects

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

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

1) Submitting Payments for Approval

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

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

The screenshot displays the Appia web interface for a payment submission. The top navigation bar includes 'OVERVIEW', 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', 'ITEMS', 'MATERIALS', 'STOCKPILES', and 'TIME LIMITS'. The main header shows the project ID '08-C008-089' with a red 'Under Construction' tag, and the breadcrumb 'Projects / 08-C008-089 / Payments / Payment #1'. The 'Submit For Approval' button is circled in green, with a dropdown menu showing 'Submit in Appia®' and 'Submit to Doc Express®' options. The 'Payment Information' section is divided into three main areas: 'Payment Details', 'Project Details', and 'Pay Period'. The 'Payment Details' section includes 'Payment Number 1', 'Percent Complete 3.3%', 'Payment Status Draft', and 'Item Payment Amount \$17,303.50'. The 'Project Details' section includes 'Prime Contractor DIXON CONSTRUCTION CO.'. The 'Pay Period' section includes 'From Date 09/25/2023' and 'To Date 10/04/2023'. The 'Retainage' section includes 'Retainage Percent 3.000%' and 'Retainage Cap Amount \$30,000.00'.

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

Project Details	
Prime Contractor	DIXON CONSTRUCTION CO.

Pay Period	
From Date	09/25/2023
To Date	10/04/2023

Retainage	
Retainage Percent	3.000%
Retainage Cap Amount	\$30,000.00

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

The screenshot shows the Appia system interface for a project titled "BROS-C086(60)--8J-86 - 31961" with a status of "Under Construction". The page is titled "Payment Information" and displays the following details:

Payment Details		Project Details	
Payment Number	Percent Complete	Prime Contractor	Project Manager
2	5.1%	PETERSON CONTRACTORS INC.	Nicole Stinn
Payment Status	Item Payment Amount	Managing Office	
Pending	\$67,438.40	Tama County Highway Department	

The "Approve" button is located in the top right corner of the page, next to the "Actions" and "Reports" buttons. It is a blue button with the word "Approve" in white text.

2) Uploading Payment to Doc Express for Signatures

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

3) Making a Progress Payment

Reimbursement Projects

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

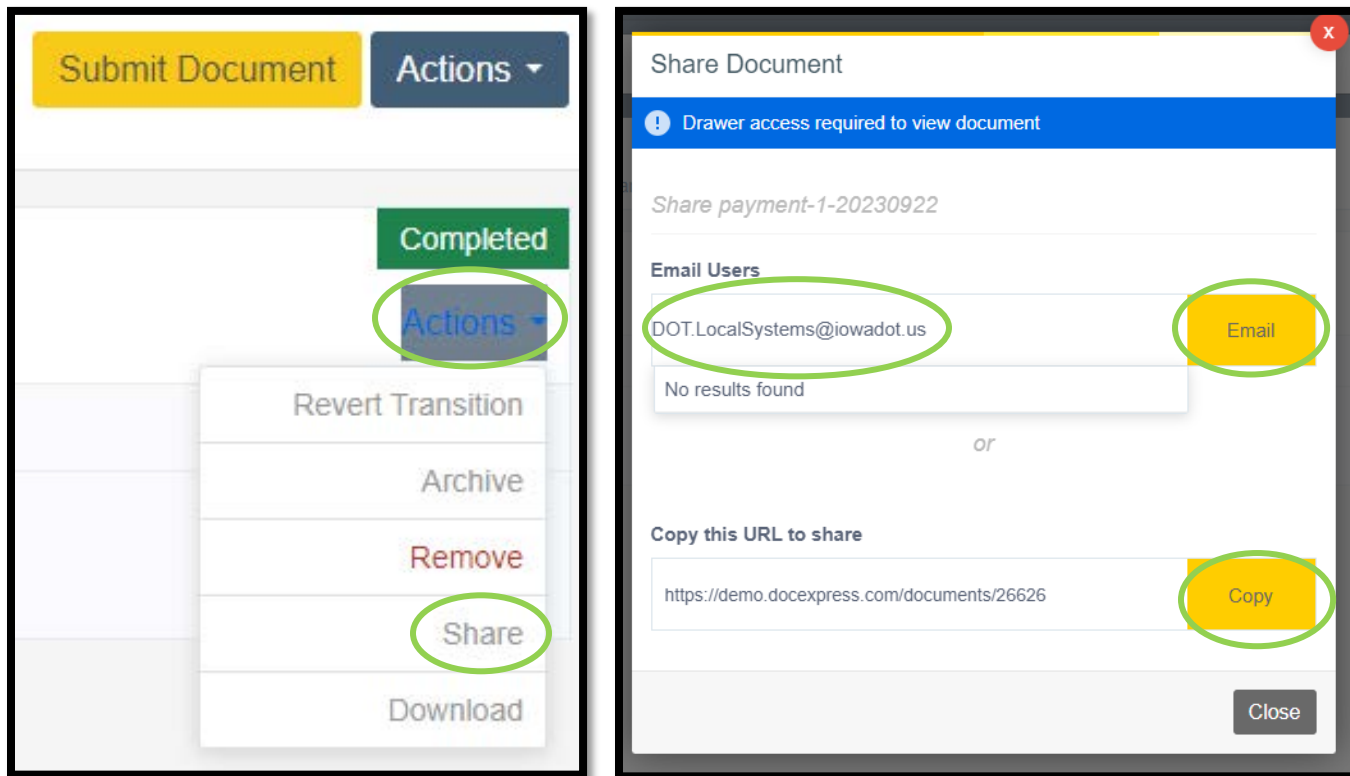
Once the payment report is signed in Doc Express, create a claim/invoice locally. Once the claim has been paid locally, submit a reimbursement request to the Administering Team using the appropriate Claim for Reimbursement form. (See [I.M. 6.020](#) for links to the Claim for Reimbursement forms.)

Contractor Payment System (CPS) Projects

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

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

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



4) Making a Final Payment

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

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

Two processes exist for generating a final payment.

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

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

Reimbursement Projects

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

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

Contractor Payment System (CPS) Projects

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

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

a) Standard Payment for Final Payment

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

b) Appia's Final Payment Process

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

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

Reimbursement Projects

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

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

Contractor Payment System (CPS) Projects

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

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

Appia Auto-Pay Projects

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

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

1) Submitting Payments for Approval

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

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

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

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

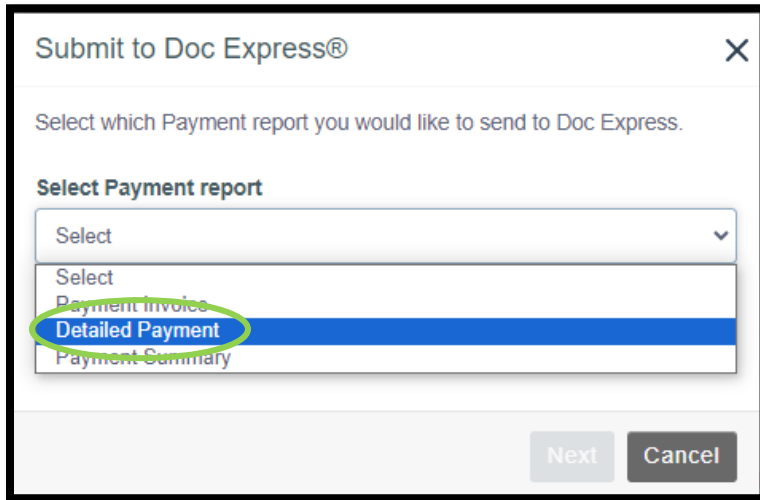
The screenshot shows the Appia project interface for project 08-C008-089, which is in 'Under Construction' status. The breadcrumb trail is 'Projects / 08-C008-089 / Payments / Payment #1'. The main header displays the project ID '08-C008-089' and the status 'Under Construction'. Below this, it shows 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. The navigation bar includes 'OVERVIEW', 'WORK PERFORMED', and 'ATTACHMENTS'. The 'Submit For Approval' button is highlighted, and the 'Submit to Doc Express®' option is circled in green. The 'Payment Information' section is visible, showing 'Payment Details' and 'Project Details'.

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

Project Details
Prime Contractor
DIXON CONSTRUCTION CO.

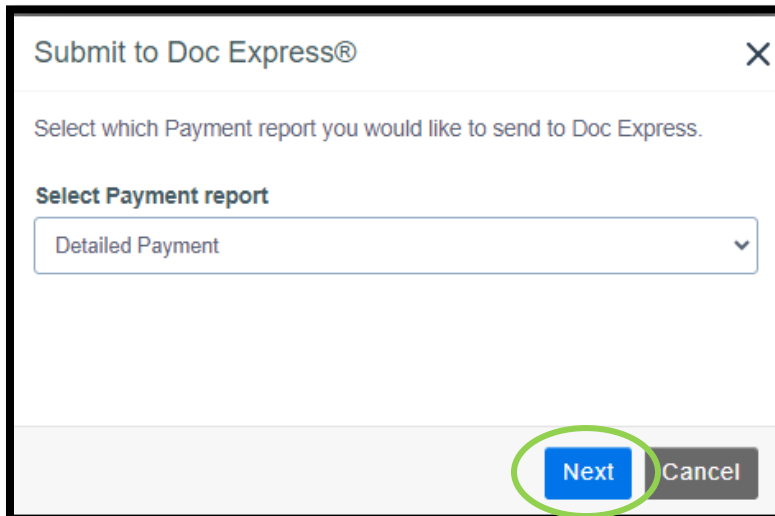
Do NOT Approve the payment in Appia until it is transitioned to “Completed” in Doc Express as described on the following pages!

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



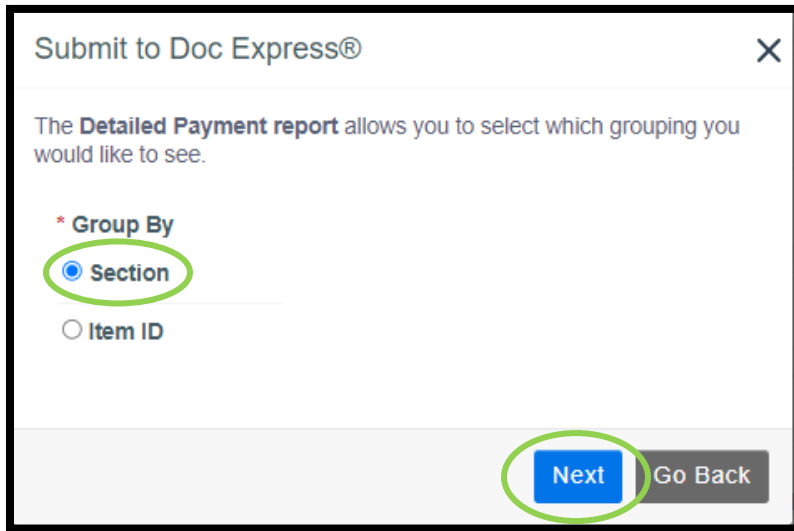
The screenshot shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title bar, there is a text prompt: "Select which Payment report you would like to send to Doc Express." Underneath this is a section labeled "Select Payment report" containing a dropdown menu. The dropdown menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is also circled with a green oval. At the bottom right of the window, there are two buttons: a light gray "Next" button and a dark gray "Cancel" button.

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



This screenshot shows the same "Submit to Doc Express®" pop-up window. The dropdown menu now displays "Detailed Payment" as the selected option. At the bottom right, the "Next" button is highlighted with a green oval, indicating it should be clicked. The "Cancel" button remains visible next to it.

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



Submit to Doc Express®

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

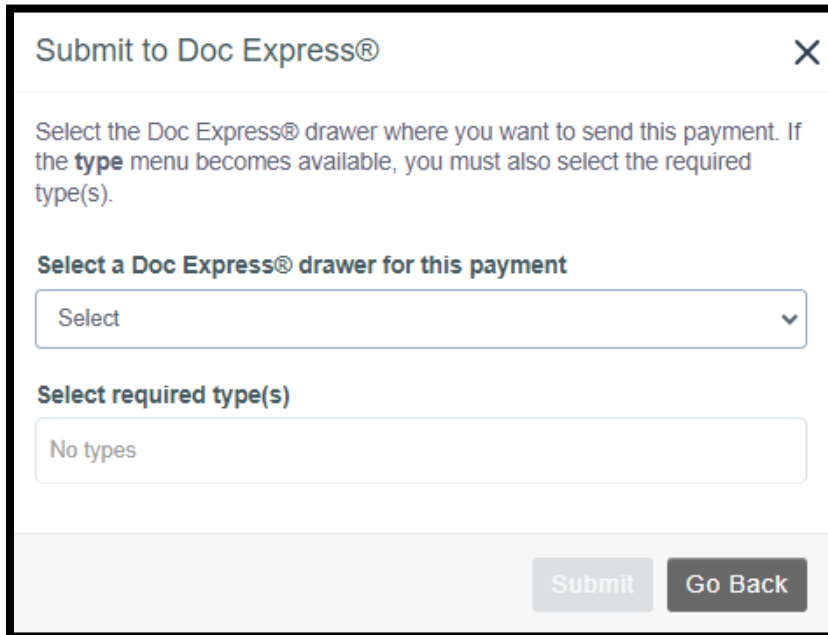
* Group By

☒ Section

☐ Item ID

Next Go Back

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. The following example screenshots are for an estimate payment (a progress payment). **For the pre-audit agreement/estimate payment (formerly known as the semi-final payment), the drawer and type will differ according to the Doc Express naming convention.** Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection.



The screenshot shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. Inside the window, there is instructional text: "Select the Doc Express® drawer where you want to send this payment. If the **type** menu becomes available, you must also select the required type(s)." Below this text are two selection areas. The first is labeled "Select a Doc Express® drawer for this payment" and contains a dropdown menu with the word "Select" and a downward arrow. The second is labeled "Select required type(s)" and contains a text box with the text "No types". At the bottom right of the window are two buttons: "Submit" and "Go Back".

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Select

Select

Change Order

Contract Documents

Estimates and Vouchers

Project Closeout

Weekly Reports

Submit

Go Back

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Estimates and Vouchers

Select required type(s)

Select type(s)

Project Closeout (Form 24001)

Pay Estimate

Proof of Payment to Contractor

Progress Voucher

Stockpiled Materials

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Select

Select

Change Order

Contract Documentation

Contract Signing

Environmental

Estimate Payments

Items and Materials Documentation

Payrolls

Plans

Project Closeout

Shop & Working Drawings

Traffic Control

Weekly Reports

Working

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Estimate Payments

Select required type(s)

Select type(s)

Claim for Reimbursement of State Grant Program (RISE, RT)
Project Costs (Form 240011)

Estimate Payment

Proof of Payment

Stockpiled Materials

Note: Remember to reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. **Pre-Audit Agreement/Estimate Payments (previously referred to as semi-final payments) and final vouchers will go in a different drawer and have a different type than what is shown in the screenshots on this page.**

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

Pre-July 2025 Letting

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Estimates and Vouchers

Select required type(s)

× Progress Voucher

SubmitGo Back

July 2025 Letting and Later

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Estimate Payments

Select required type(s)

× Estimate Payment

SubmitGo Back

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

The screenshot displays a software interface for managing payments. At the top, a green ribbon contains the following messages:

- The payment has been submitted for approval successfully.
- The payment report has been sent to Doc Express® successfully.

Below the ribbon, a blue banner indicates the user is logged in as 'Doing business as Iowa Local Systems - DEMO ACCOUNT' and offers a link to 'Switch to another business?'.

The main content area shows the 'Payment Information' for project '08-C008-089' (Under Construction). The payment details include:

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

Project Details:

Project Details
Prime Contractor
DIXON CONSTRUCTION CO.

Pay Period:

From Date	To Date
09/25/2023	10/04/2023

Retainage:

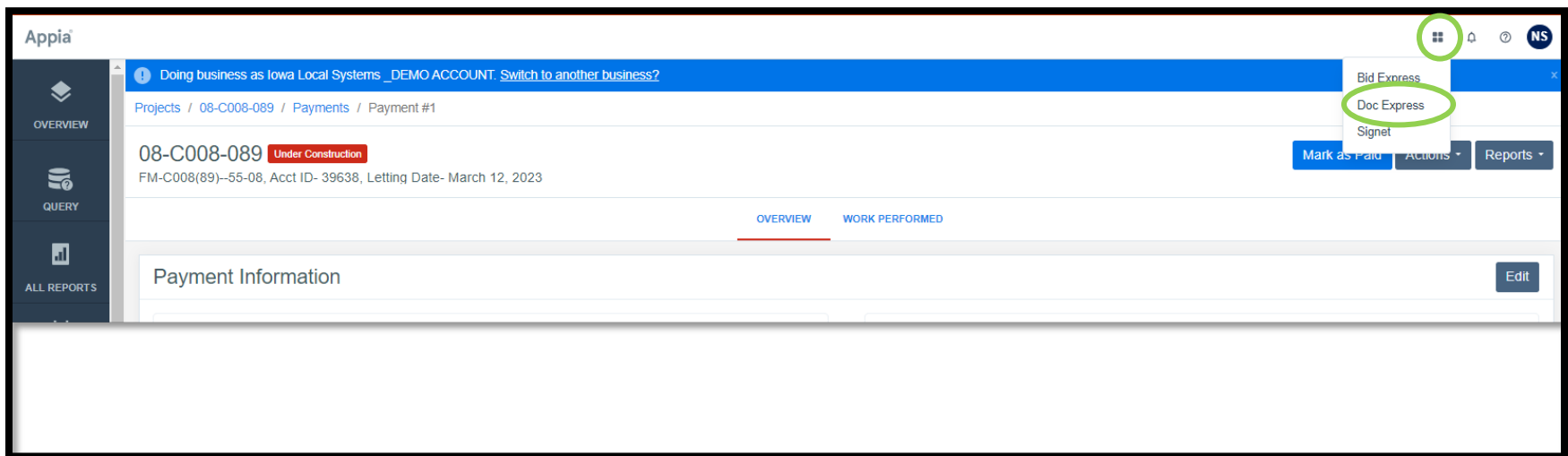
Retainage Percent	Retainage Cap Amount
3.000%	\$30,000.00
Retainage Released	
\$0.00	

The 'Doc Express® Information' section, circled in green, shows the following details:

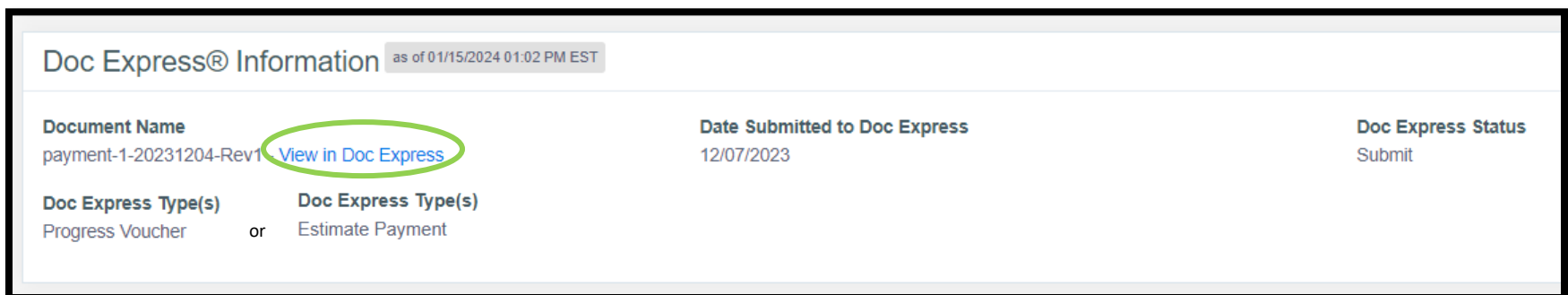
Document Name	Date Submitted to Doc Express	Doc Express Status
payment-1-20231204 - View in Doc Express	12/07/2023	Submit

Doc Express Type(s): Progress Voucher or Estimate Payment

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



Or



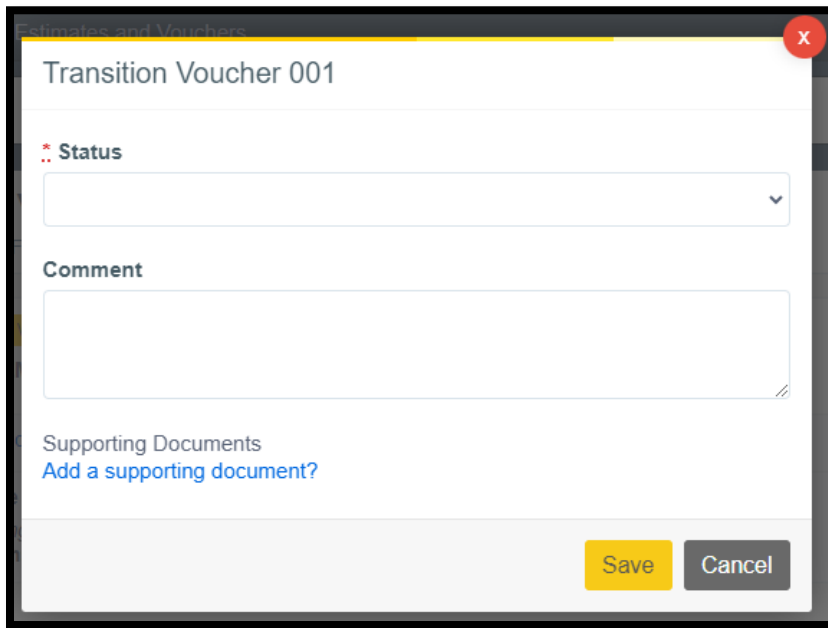
Once in Doc Express, select the appropriate contract and the appropriate drawer for the payment being submitted. The payment will show with a name similar to the one shown in the screenshot below. Do NOT update the name of the document. Note: The name of the Drawer will be “Estimate Payments” if the project was let in July 2025 or later.

The screenshot shows the 'Estimates and Vouchers' interface. At the top, there's a header with the title 'Estimates and Vouchers' and a subtitle '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...'. On the right, there are buttons for 'Submit Document' and 'Actions'. Below the header, the document title 'payment-1-20231204' is circled in green. To its right are buttons for 'Progress Voucher' and 'update'. Further right is a 'Submit' button. Below the title, the text 'Iowa Local Systems _DEMO ACCOUNT' is displayed. To the right of this text is a link 'Transition / Actions'. Below this, it says '0 comments 0 supporting documents'. At the bottom, there's a date 'Dec 07 2023', a time '12:21 PM EST', and a status 'Submit Version 1 (current)'. The user 'Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn' is listed at the bottom.

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

This screenshot is identical to the one above, but the 'Transition' link is now circled in green. The rest of the interface remains the same, including the document title 'payment-1-20231204', the 'Progress Voucher' and 'update' buttons, the 'Submit' button, the account name 'Iowa Local Systems _DEMO ACCOUNT', the 'Transition / Actions' link, the comment and document counts, and the user information at the bottom.

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



Estimates and Vouchers

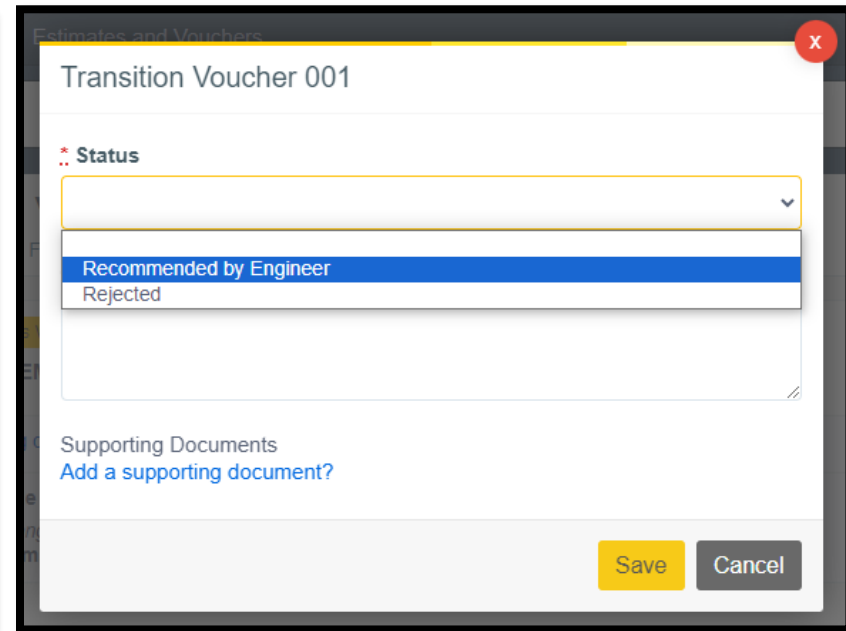
Transition Voucher 001

* Status

Comment

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

Save Cancel



Estimates and Vouchers

Transition Voucher 001

* Status

Recommended by Engineer
Rejected

Comment

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

Save Cancel

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

The screenshot shows a web application window titled "Transition Voucher 001". At the top, there is a header bar with the text "Estimates and Vouchers" and a red close button. Below the header, the main content area contains a form. The first section is labeled "Status" with a red asterisk icon, and it features a dropdown menu currently set to "Recommended by Engineer". Below this is a "Comment" section with a large text input area. Further down, there is a "Supporting Documents" section with a link that says "Add a supporting document?". A prominent light blue box with a dashed border and the text "Sign this document" is overlaid on the form. Below this box, there is a checkbox labeled "By checking this box and entering my name above, I am electronically signing the attached document." At the bottom of the form, there is another checkbox labeled "Transition document to final status of Completed?", followed by a yellow "Save" button and a grey "Cancel" button. A small copyright notice is visible at the very bottom of the window.

Transition Voucher 001

* Status

Recommended by Engineer

Comment

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

Sign this document

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

☐ Transition document to final status of **Completed?** Save Cancel

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

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

The screenshot shows a web form titled "Transition Voucher 001". It includes a "Status" dropdown menu currently set to "Recommended by Engineer", a "Comment" text area, and a "Supporting Documents" section with a link "Add a supporting document?". A signature box contains the name "Nicole Stinn". Below this, there are two checkboxes: the first is checked and accompanied by the text "By checking this box and entering my name above, I am electronically signing the attached document."; the second is unchecked and labeled "Transition document to final status of Completed?". At the bottom right are "Save" and "Cancel" buttons. A green callout box on the left points to the second checkbox with the text: "Check this box if no further signatures are required on the document. Otherwise, leave it un-checked." Green circles highlight the checked checkbox, the name "Nicole Stinn", and the "Save" button.

Transition Voucher 001

Status

Recommended by Engineer

Comment

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

Nicole Stinn

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

☐ Transition document to final status of **Completed?**

Save Cancel

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

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

Payments will NOT transmit to the Finance Bureau unless the Doc Express status is “Completed”!

Will not be sent to Finance!

The screenshot shows the 'Estimates and Vouchers' interface. At the top, there is a header with the title 'Estimates and Vouchers' and a subtitle '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...'. On the right, there are two buttons: 'Submit Document' (yellow) and 'Actions' (dark blue with a dropdown arrow). Below the header, there is a section for 'Voucher 001' with a 'Progress Voucher' label and an 'update' button. The voucher is associated with 'Iowa Local Systems _DEMO ACCOUNT'. On the right side of this section, the status 'Recommended by Engineer' is displayed in a green box, which is circled in red. Below this, there are links for 'Transition' and 'Actions'. At the bottom, it shows '0 comments', '0 supporting documents', and a timestamp 'Dec 01:04 PM EST' followed by the status 'Recommended by Engineer'.

The screenshot shows the 'Estimates and Vouchers' interface, similar to the one above. The header and buttons are the same. In the 'Voucher 001' section, the status 'Completed' is displayed in a green box, which is circled in green. The rest of the interface, including the account name, comments, supporting documents, and timestamp, remains the same.

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

08-C008-089 Under Construction

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

Approve Actions Reports

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

FORCE ACCOUNTS

DISPATCH

OVERVIEW

WORK PERFORMED

ATTACHMENTS

Payment Information

Payment Details

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

Project Details

Prime Contractor
DIXON CONSTRUCTION CO.

Pay Period

From Date	To Date
09/25/2023	10/04/2023

Retainage

Retainage Percent	Retainage Cap Amount
3.000%	\$30,000.00
Retainage Released	
\$0.00	

Doc Express® Information as of 12/07/2023 01:11 PM EST

Document Name	Date Submitted to Doc Express	Doc Express Status
Voucher 001 - View in Doc Express	12/07/2023	Completed
Doc Express Type(s)	or Doc Express Type(s)	
Progress Voucher	Estimate Payment	

229

Once the Doc Express status of “Completed” is showing in the payment and you are SURE the payment is ready to be submitted to the Finance Bureau for processing, click on the blue “Approve” button in the upper, right corner of the Payment screen. **Do NOT approve the payment in Appia until the Payment has been transitioned to “Completed” in Doc Express.** Appia will NOT automatically pull in the updated Doc Express status, and the payment will not be processed because the updated status is not reflected.

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

The screenshot shows the Appia interface for a payment screen. On the left is a dark sidebar with icons and labels: 'QUERY' (database icon), 'ALL REPORTS' (bar chart icon), 'DAILY ACTIVITIES' (calendar icon), and 'ITEMS' (grid icon). The main header area displays the project ID '08-C008-089' with a red 'Under Construction' tag, and the text 'FM-C008(89)--55-08, Acct ID- 39638, Letting Date- March 12, 2023'. In the top right corner, there are three buttons: 'Approve' (blue), 'Actions' (grey with a dropdown arrow), and 'Reports' (grey with a dropdown arrow). The 'Approve' button is circled in green. Below the header, there are three tabs: 'OVERVIEW' (active, underlined), 'WORK PERFORMED', and 'ATTACHMENTS'. The main content area is titled 'Payment Information' and contains two panels. The 'Payment Details' panel has a table with the following data:

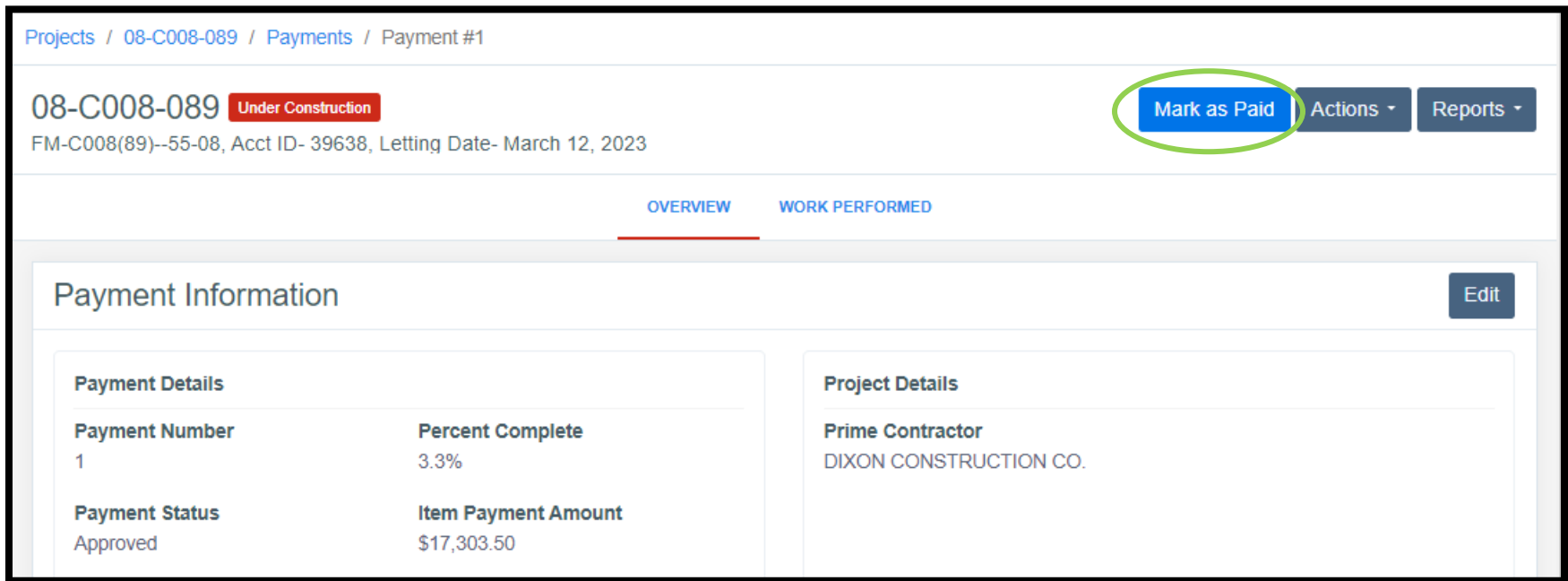
Payment Details	
Payment Number	Percent Complete
1	3.3%
Payment Status	Item Payment Amount
Pending	\$17,303.50

The 'Project Details' panel shows the 'Prime Contractor' as 'DIXON CONSTRUCTION CO.'.

Once the payment has been made a Proof of Payment document will be uploaded to Doc Express by the Local Systems Bureau. Once the Proof of Payment has been uploaded and the LPA has checked the Proof of Payment against their submitted Appia payment report, the payment can be Marked as “Paid” in Appia.

Marking a payment as “Paid” is “undo-able”. It will lock down all approved reports/entries in Appia made prior to the “Paid” date. This includes change orders and daily reports. Marking a payment as “Paid” is recommended in order to avoid payments from being intentionally or unintentionally un-approved and changed after they have already been submitted to the Finance Bureau for processing. However, do NOT mark a payment as “Paid” until you are sure are prior entries are in order.

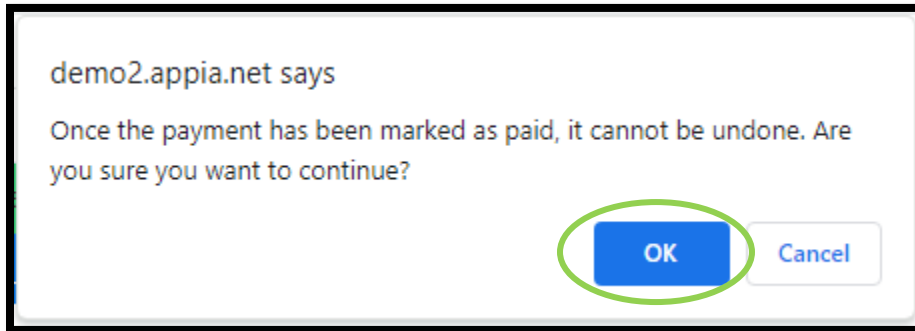
To mark a payment as “Paid”, click on the blue “Mark as Paid” button near the top, right corner of the Payment screen.



The screenshot displays the Appia payment interface. At the top, the breadcrumb navigation reads "Projects / 08-C008-089 / Payments / Payment #1". Below this, the project identifier "08-C008-089" is shown next to a red "Under Construction" status tag. To the right, a blue "Mark as Paid" button is highlighted with a green circle, alongside "Actions" and "Reports" dropdown menus. Below the header, there are tabs for "OVERVIEW" (selected) and "WORK PERFORMED". The main section is titled "Payment Information" and includes an "Edit" button. It is divided into two columns: "Payment Details" and "Project Details".

Payment Details		Project Details
Payment Number	Percent Complete	Prime Contractor
1	3.3%	DIXON CONSTRUCTION CO.
Payment Status	Item Payment Amount	
Approved	\$17,303.50	

A pop-up box will appear near the top of the screen asking if you are sure you want to continue and that the action cannot be undone. Click the blue “OK” button if you want to proceed.



A green ribbon will appear at the top of the Payment screen saying, “The payment has been paid.”

2) [Making a Final Payment](#)

When a local agency has completed the semi-final payment, and after the Administering Team has audited/reviewed the project or waived the audit/review, it is time to move forward with processing a final payment, which includes any remaining adjustments to bid items and retainage release. For projects subject to this section, Appia’s final payment process must be utilized. This process includes the creation of a balancing change order, if the applicable setting did not get un-checked, and requires marking items and time limits as “complete”. See the [Appia's Final Payment Process – Including Balancing Change Order](#) or the [Appia’s Final Payment Process – Without Balancing Change Order](#) subsections for guidance on this process.

Payments							Add
! Issue <u>final payment?</u>							×
End Date	Status		Payment	To Date	% Complete	No.	
10/04/2023	Approved	Doe Express	\$16,784.39	\$16,784.39	3.3%	1	
Displaying 1 payment							

I. [Early or Partial Retainage Release](#)

In the event a contractor requests an early/partial release of retained funds, a payment may be created for this purpose. Before completing any early/partial retainage release payments, refer to [I.M. 6.000, Attachment D](#) (section 2.28) and confirm with your [Local Systems Field Engineer](#) or Systems Planning Project Manager that a release is acceptable. Under no circumstances should a Local Public Agency release the full retainage until the project audit/review has been completed or waived by the Administering Team and the Administering Team has given the “ok” to release the retainage.

To create a payment with a partial retainage release, you will generate a standard payment in the same manner you’ve generated progress payments throughout the rest of the project. (See each of the previous subsections in this [Payments](#) section for instructions on creating payments.) Early retainage release payments should only include the retainage release and should not include any item progress payments. Appia will automatically include any item postings in the date range specified for the payment, so be sure to either run the payment for the retainage release in a week with no other item progress postings or keep the Daily Reports with the postings in draft status so they are not incorporated into the retainage release payment.

- To release retainage, simply enter the amount of retainage that needs to be released in the “Release” field. (The Retainage % should not need to be adjusted and can be left at the % used throughout the project.)
 - The value of retainage previously held on that contract can be found in the summary block on the last issued payment or on the “Overview” screen for the project. (Click “Save” to see the summary block on the “Overview” screen if in editing mode.)
- Remarks: In the “Remarks” field, enter “Early/Partial Retainage Release”.
- From/To Dates: Double check that you are paying to the last date desired.
- Exclusions: Double check that any exclusions are appropriate before approving your payment.

Click the blue “Save” button in the top, right corner and submit the payment for approval as typical when all details have been entered. A “Detailed Payment” report can then be generated which will summarize the payment.

See screenshot on the next page.

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

PUNCH LIST

PAYMENTS

Edit

Payment Details

Payment Number

4

Percent Complete

0.8%

Payment Status

Draft

Item Payment Amount

\$0.00

Project Details

Prime Contractor

NORRIS ASPHALT PAVING CO., LC

Pay Period

* From Date

09/07/2023

* To Date

10/06/2023

Payment Dates

Approval Date

Payment Date

Retainage

Retain

3.000%

Release

\$31,981.20

Retainage Cap Amount

\$30,000.00

[Edit Project Cap Settings](#)

Remarks

14px

B

I

U

A

Early/Partial Retainage Release

Save

Cancel

J. [Final Payment](#)

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

STOP: Do NOT make final payment and release retainage on a DOT-administered project unless the Administering Team has completed or waived their audit/review and has given the “ok” to make final payment.

Two processes exist for generating a final payment.

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

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

Reimbursement Projects

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

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

Contractor Payment System (CPS) Projects

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

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

Appia Auto-Pay Projects

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

Use Appia’s Final Payment Process only.

Projects / BROS-C086(60)--8J-86 - 31961 / Payments

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Payments Add

Issue final payment?

End Date	Status	Payment	To Date	% Complete	No.
01/28/2019	Approved	\$65,415.25	\$72,753.30	0.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

Displaying all 2 payments

infotech

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Refer to the paragraph directly above to determine if Appia's final payment process is appropriate for the project.

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

1) Standard Payment for Final Payment

To create a final payment report using the standard payment method, you will generate a standard payment report in the same manner you've generated progress payment reports throughout the rest of the project. (See each of the previous subsections in the [Payments](#) section for instructions on creating payment reports.)

The only difference between the final payment and estimate payments will be the remark entered and the value entered in the "Release" field.

- Retainage Release: For the retainage release, simply enter the amount of retainage that needs to be released in the "Release" field. Do not adjust the Retainage %. Leave it at the % used throughout the project.
 - The value of retainage previously held on that contract can be found in the summary block on the last issued payment report or on the "Overview" screen for the project. (Click "Save" to see the summary block on the "Overview" screen if in editing mode.)
- Remarks: In the "Remarks" field, enter "FINAL VOUCHER".
- From/To Dates: Double check that you are paying to the last date desired.
- Exclusions: Make sure there are no exclusions (or no desired exclusions) before approving your final payment since this is the last payment on which any items will be paid.

STOP: Do NOT make final payment and release retainage on a DOT-administered project unless the Administering Team has completed or waived their audit/review and has given the "ok" to make final payment.

If the Administering Team has completed or waived the project audit/review and has given the "ok" to make final payment, click the blue "Save" button in the top, right corner and submit the payment for approval as typical when all details have been entered. A "Detailed Payment" report can then be generated which can be downloaded and then uploaded to Doc Express for inclusion with the final packet. Please see the [Doc Express Naming Convention](#) to determine the appropriate drawer and document name.

See screenshot on the next page.

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

Edit

SaveCancel

Payment Details

Payment Number
3
Percent Complete
5.1%
Payment Status
Draft
Item Payment Amount
\$0.00

Project Details

Prime Contractor
PETERSON CONTRACTORS INC.
Project Manager
Nicole Stinn
Managing Office
Tama County Highway Department

Pay Period

From Date
01/29/2019
To Date
01/31/2019

Payment Dates

Approval Date
Payment Date

Retainage

Retain
3.000%
Release
\$28,572.68
Retainage Cap Amount
\$30,000.00
[Edit Project Cap Settings](#)

Remarks

14px B I U
FINAL VOUCHER

Help

AFTER the Administering Team has verified that the project is complete, the project audit is complete or waived, and the final payment generated above has been processed, then you may begin Appia’s final payment process in order to move a project to “Completed” status and remove it from the “Under Construction” status project list. See the [Appia’s Final Payment Process – Including Balancing Change Order](#) or the [Appia’s Final Payment Process – Without Balancing Change Order](#) subsection, whichever is applicable, for guidance on completing that process.

2) Appia's Final Payment Process – Including Balancing Change Order

AFTER the Administering Team has verified that the project is complete and all necessary reviews and audits have been completed, you may begin Appia's final payment process. To begin the process, click on the "Issue final payment" link on the Payments screen.

Projects / 05-C005-074 / Payments

05-C005-074 Under Construction

FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Payments Add

Issue final payment?

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	96.3%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	95.3%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.5%	1

Displaying all 3 payments


***Note: Appia's final payment cannot be completed on the same day as a regular payment. Therefore, you must wait at least one day after approving a normal payment to issue Appia's final payment, or you can adjust your normal payment so that the "To Date" does not include the current day.

This screen should appear. If the box was checked for the “Final Balancing Change Order Rule” in the Project Settings, a balancing change order will be required. If this is the case, first, click on the link to “Balance items”. If the box was un-checked, the item for “All items are balanced” will be absent, and no balancing change order will be required to generate the final payment. If this is the case, see the [Appia’s Final Payment Process – Without Balancing Change Order section](#). (See the Default Settings: Projects Settings and/or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for further guidance on the final balancing change order setting.)

Clicking on “Balance items?” will cause a “Balancing Change Order” to be automatically created for all items except items marked as “lump sum” items. (This is partially why Local Systems asks you to remove lump sum “flags” from lump sum items in your reference data. See the [Appia Project Creation & Account Management Instructions](#) for removing lump sum “flags” from items.) A balancing change order changes the authorized quantities (original contract quantities or original quantities + change orders to date) to match the quantities that have been paid or are in an approved daily report.

Page County Test Under Construction

Letting Date



Final Payment

Final payment cannot be made until...

❗

All items are balanced.

Items must be balanced to ensure correct payment adjustments. [Balance items?](#)

❗

All items are completed.

Items must be completed to ensure correct payment adjustments. [Complete items?](#)

✅

All punch list tasks are completed.

Done.

✅

All stockpiles are fully recovered.

Done.

❗

All time limits are completed.

Time limits must be completed. [Complete time limits?](#)

Create Final Payment

241

Clicking on “Balance items” will bring up this screen. Check the “Items” box in the upper, left corner to select all items. Then, click the gray “Balance Items” button at the bottom or in the top, right corner.

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

05-C005-074 Under Construction

FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

☒ Items

Save **Balance Items** Cancel

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

Line Number	Item ID	Unit	Description	Complete?
<input checked="" type="checkbox"/> Section: 0001 - ROADWAY ITEMS				
<input checked="" type="checkbox"/> 0010	2102-2713070	CY	EXCAVATION, CLASS 13, ROADWAY AND BORROW	No
<input checked="" type="checkbox"/> 0020	2109-8225100	STA	SPECIAL COMPACTION OF SUBGRADE	No
<input checked="" type="checkbox"/> 0030	2113-0001100	SY	SUBGRADE STABILIZATION MATERIAL, POLYMER GRID	No
<input checked="" type="checkbox"/> 0040	2115-0100000	CY	MODIFIED SUBBASE	No
<input checked="" type="checkbox"/> 0050	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/> 0060	2122-5500080	SY	PAVED SHOULDER, HOT MIX ASPHALT MIXTURE, 8 IN.	No
<input checked="" type="checkbox"/> 0070	2210-0475105	TON	CHOKE STONE BASE	No
<input checked="" type="checkbox"/> 0080	2217-1000000	SY	RUBBLIZED PAVEMENT	No
<input checked="" type="checkbox"/> 0090	2301-1032080	SY	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT, CLASS C, CLASS 2 DURABILITY, 8 IN.	No

TIME LIMITS

CHANGE ORDERS

FORCE ACCOUNTS

<input checked="" type="checkbox"/> 0260	2527-9263180	STA	PAVEMENT MARKINGS REMOVED	No
<input checked="" type="checkbox"/> 0270	2528-2518000	EACH	SAFETY CLOSURE	No
<input checked="" type="checkbox"/> 0280	2528-8400256	EACH	TEMPORARY TRAFFIC SIGNALS	No
<input checked="" type="checkbox"/> 0290	2528-8445110	LS	TRAFFIC CONTROL	No
<input checked="" type="checkbox"/> 0300	2533-4980005	LS	MOBILIZATION	No

Save

Balance Items

A screen like this should appear with a green ribbon across the top saying, “The items have been updated successfully”. This is the newly created “balancing change order”. Review the items, and then click the blue “Submit for Approval” button in the upper, right corner. A drop-down menu will appear. Select “Submit to Doc Express”.

Projects / 05-C005-074 / Change Orders / Change Order #1

05-C005-074 Under Construction

FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Change Order

Date Created: 01/15/2024
Status: Draft

Summary: Balancing Change Order for Final Payment
Type: Total Proposed Amount: -\$65,556.57

Description: Balancing Change Order for Final Payment

Quantity Changes

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
Section: 0001 - ROADWAY ITEMS							
0010	2102-2713070	CY	407.900	-2.080	405.820	\$18.000	-\$37.44
EXCAVATION, CLASS 13, ROADWAY AND BORROW							
Reason: Balancing Change Order							
	DIVISION 1 FM-C005(74)--55-05		407.900	-2.080	405.820	\$18.000	-\$37.44
0020	2109-8225100	STA	7.600	-0.600	7.000	\$600.000	-\$360.00
SPECIAL COMPACTION OF SUBGRADE							
Reason: Balancing Change Order							

Follow the instructions in the [Submitting Change Orders for Approval Using the Doc Express Integration](#) section for submitting a change order through Doc Express.

Note: At this point, if you were to your Change Orders tab you would see that a change order has been created. Click to edit the change order to get back into it.

Change Orders						Add
Date	Status	Amount	Type	Summary	No.	
01/15/2024	Draft	-\$65,556.57		Balancing Change Order for Final Payment	1	

Displaying 1 change order

After clicking “Submit for Approval”, an “Approve” button will show if you have an appropriate role type which can administer approvals. If the appropriate Doc Express transitions have been completed and the change order has a Doc Express status of “Completed”, click “Approve”.

05-C005-074 Under Construction
FM-C005(74)-55-05, Acct ID- 38251, Letting Date- January 19, 2022

[Approve](#) [Actions](#) [Reports](#)

Change Order

Date Created 01/15/2024	Status Pending
Summary Balancing Change Order for Final Payment	Type
Description Balancing Change Order for Final Payment	Total Pending Amount -\$65,556.57

Doc Express® Information

as of 01/15/2024 04:08 PM EST

Document Name change_order-1-20240115 - View in Doc Express	Date Submitted to Doc Express 01/15/2024	Doc Express Status Completed
Doc Express Type(s) Change Order		

Quantity Changes

Line Number	Item ID	Unit	Quantity Before	Quantity Change	Quantity After	Unit Price	Extension Change
Section: 0001 - ROADWAY ITEMS							
0010	2102-2713070	CY	407.900	-2.080	405.820	\$18.000	-\$37.44

****Note:** Any lump sum items are present in the contract which are still flagged as lump sum items will have to be “balanced” on a normal change order if the quantity placed does not equal the contract quantity. This must be done in order to issue a final payment.

Now, go back to the Payments tab, and again click on the link for “Issue final payment”.

The screenshot displays the 'Payments' section of a project management interface. The project is identified as 'BROS-C086(60)--8J-86 - 31961' with a status of 'Under Construction'. The 'Issue final payment?' link is highlighted with a green circle. Below this, a table lists two payments with their respective dates, statuses, amounts, and completion percentages. The first payment is dated 01/28/2019, approved, for \$65,415.25, with 5.1% completion. The second payment is dated 01/02/2019, approved, for \$7,338.05, with 0.5% completion. The interface includes a sidebar with navigation options like Overview, Labs, Query, All Reports, Daily Activities, and Items. The footer shows the Infotech logo and copyright information.

End Date	Status	Payment	To Date	% Complete	No.
01/28/2019	Approved	\$65,415.25	\$72,753.30	5.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1


If the Final Payment screen shows a green check mark by the “All items are balanced” line, continue with marking items as complete. If not, please reference the [Troubleshooting Common Final Payment Issues](#) section.

Completing the balancing change order in the manner described above should have taken care of the second step in Appia's final payment process, which is marking all items as "complete".

Note: The "All items are balanced" will not show a green check mark until the balancing change order has been approved. It cannot remain in pending or draft status.

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

QUERY
ALL REPORTS
DAILY ACTIVITIES
ITEMS
MATERIALS


Final Payment
Final payment cannot be made until...

- ☒ All items are balanced.
Done.
- ☒ All items are completed.
Done.
- ☒ All punch list tasks are completed.
Done.
- ☒ All stockpiles are fully recovered.
Done.
- ☐ All time limits are completed.
Time limits must be completed. [Complete time limits?](#)

Create Final Payment

If the second item for all items being marked complete does not have a green check mark, click on the “Complete items” link and this screen will come up. Check the “Items” box in the upper, left corner to select all items. Then, click the blue “Save” button at the bottom or in the top, right corner.

OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDER

25-C025-118

Under Construction

FM-C025(118)-55-25: Acct ID 37059, Letting Date: August 18, 2020

☒ Items

Save

Balance Items

Cancel

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

Line Number	Item ID	Unit	Description	Complete?
<input checked="" type="checkbox"/> Section: 0001 - Roadway Items				
<input checked="" type="checkbox"/> 0010	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/> 0020	2210-0475105	TON	CHOKE STONE BASE	No
<input checked="" type="checkbox"/> 0030	2210-0475290	TON	MACADAM STONE BASE	No
<input checked="" type="checkbox"/> 0040	2213-2713300	CY	EXCAVATION, CLASS 13, FOR WIDENING	No
<input checked="" type="checkbox"/> 0050	2303-1031500	TON	HOT MIX ASPHALT STANDARD TRAFFIC, BASE COURSE, 1/2 IN. MIX	No
<input checked="" type="checkbox"/> 0060	2303-1258283	TON	ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC	No
<input checked="" type="checkbox"/> 0070	2303-6911000	LS	HOT MIX ASPHALT PAVEMENT SAMPLES	No
<input checked="" type="checkbox"/> 0080	2502-8212034	LF	SUBDRAIN, LONGITUDINAL, (SHOULDER) 4 IN. DIA.	No
<input checked="" type="checkbox"/> 0090	2502-8225010	EACH	SUBDRAIN OUTLET, 500-10	No
<input checked="" type="checkbox"/> 0100	2528-8445110	LS	TRAFFIC CONTROL	No
<input checked="" type="checkbox"/> 0110	2528-8445113	EACH	FLAGGERS	No
<input checked="" type="checkbox"/> 0120	2533-4980005	LS	MOBILIZATION	No

Save

Balance Items

Continue completing any remaining steps in Appia's final payment process for punch lists and stockpiles. (Reminder: To get here, go to Payments and then click on the "Issue final payment" link.) Last, follow the "Complete time limits?" link to mark Time Limits as complete.

The screenshot shows the Appia final payment process interface. On the left is a dark sidebar with navigation links: OVERVIEW, LABS, QUERY, ALL REPORTS, DAILY ACTIVITIES, ITEMS, and MATERIALS. The main header displays '25-C025-118' with a red 'Under Construction' tag, and 'FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020'. The central area features a 'Final Payment' icon (a document with a dollar sign) and the text 'Final payment cannot be made until...'. To the right, a list of five items is shown, each with a status icon and a link: 1. 'All items are balanced.' with a red exclamation mark icon and link 'Balance items?'. 2. 'All items are completed.' with a green checkmark icon and text 'Done.'. 3. 'All punch list tasks are completed.' with a green checkmark icon and text 'Done.'. 4. 'All stockpiles are fully recovered.' with a green checkmark icon and text 'Done.'. 5. 'All time limits are completed.' with a red exclamation mark icon and link 'Complete time limits?'. The last three items are circled in green. At the bottom right is a 'Create Final Payment' button.

25-C025-118 Under Construction
FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

Final Payment
Final payment cannot be made until...

- ! All items are balanced.
Items must be balanced to ensure correct payment adjustments. [Balance items?](#)
- ✓ All items are completed.
Done.
- ✓ All punch list tasks are completed.
Done.
- ✓ All stockpiles are fully recovered.
Done.
- ! All time limits are completed.
Time limits must be completed. [Complete time limits?](#)

Create Final Payment

Clicking on the “Complete time limits?” link will bring you to the Time Limits section. Click on the blue text of the name of the appropriate time limit and then on the “Edit” button in the next screen to edit the time limits data.

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Time Limits

Time limit name	Type	Completed	Status	Days remaining
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	0.0%	Not Started	35.0

Displaying 1 time limit

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Time Limit

Edit Cancel

Primary		
Description	Type	Status
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	Not Started
Original Days Allowed	Liquidated Damages/Day	Authorized Days Allowed
35.0	\$0.00	35.0

In the editing screen, click on the “Work Completed” toggle to mark it as “Yes”. Then click the blue “Save” button in the top, right corner.

Edit

Working Days

Description
Working Days, Late Start Date: 09/21/20, Liquidated Damages: \$1,000.00

Start Date
09/11/2020

Work Completed
09/14/2020

Days Charged
1.5

Liquidated Damages/Day
\$0.00

Days Remaining
23.5

Total Liquidated Damages
\$0.00

Primary Deadline?
☒ YES

Work Completed?
☒ YES

Calendar: April 2021

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

Return to the final payment.

Payments

Issue final payment?

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved	\$42,873.56	\$42,873.56	2.6%	1

When all tasks in the “Issue final payments screen have been completed”, it will bring you to the payment screen, and a ribbon across the top will say, “The payment has been saved successfully.” Review the details in the payment and then click on the blue “Submit for Approval” button in the top, right corner, and choose the “Submit to Doc Express” option from the drop-down menu.

The payment has been saved successfully.

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

Projects / 05-C005-074 / Payments / Payment #4 / Edit

05-C005-074 Under Construction

FM-C005(74)-55-05, Acct ID- 38251, Letting Date- January 19, 2022

OVERVIEW SUMMARY WORK PERFORMED ATTACHMENTS

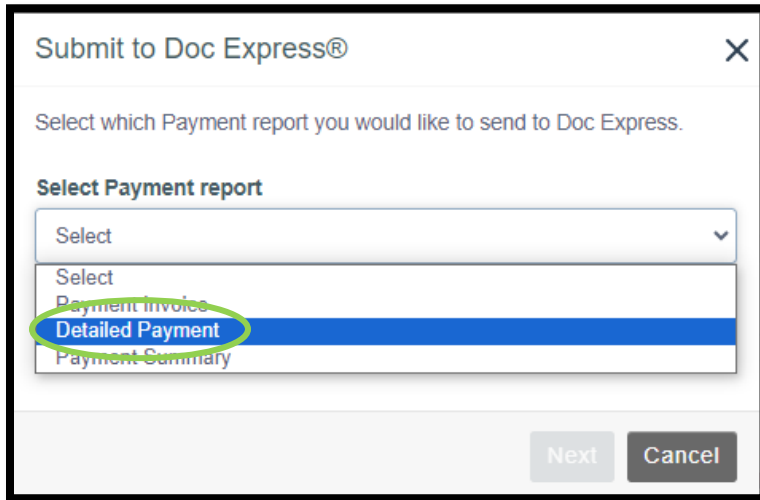
This is your final payment.

Edit Final Payment Save Cancel

Payment Details		Project Details	
Payment Number	Percent Complete	Prime Contractor	
4	100.0%	HENNINGSEN CONSTRUCTION, INC.	
Payment Status	Item Payment Amount		
Draft	\$0.00		

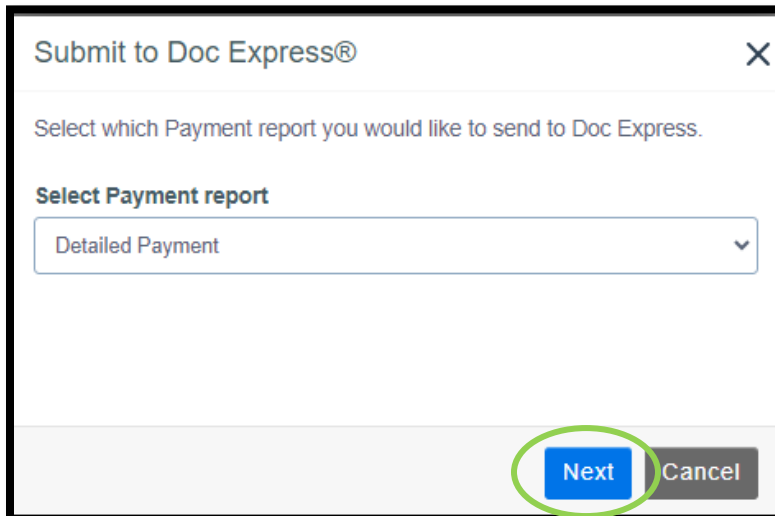
Pay Period		Payment Dates	
* From Date	* To Date	Approval Date	Payment Date
01/03/2024	01/15/2024		

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



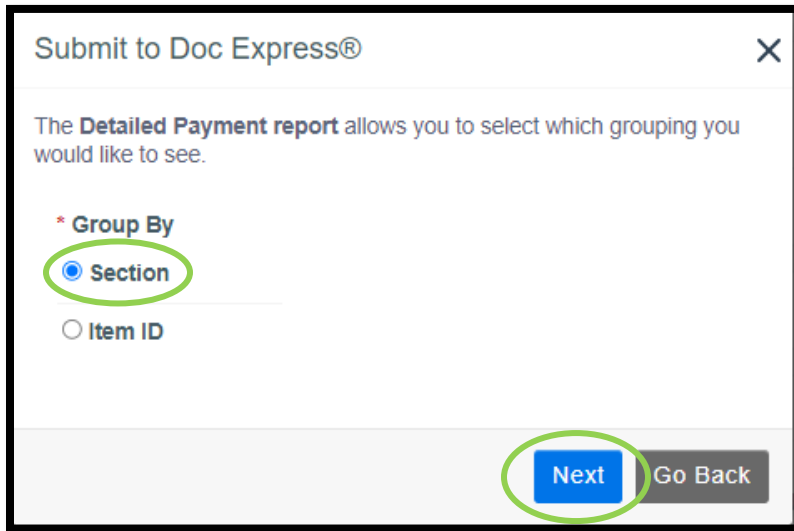
The screenshot shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title bar, there is a text prompt: "Select which Payment report you would like to send to Doc Express." Underneath this is a section labeled "Select Payment report" containing a dropdown menu. The dropdown menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is also circled with a green oval. At the bottom right of the window, there are two buttons: a light gray "Next" button and a dark gray "Cancel" button.

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



This screenshot shows the same "Submit to Doc Express®" pop-up window. In this state, the dropdown menu is closed, and "Detailed Payment" is displayed as the selected report within the menu box. The "Next" button at the bottom right is now highlighted with a green oval, indicating it is the button to be clicked.

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



Submit to Doc Express®

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

* Group By

☒ Section

☐ Item ID

Next Go Back

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. (Note: The naming convention will show, for the Final Payment, the drawer should be the **Project Closeout** drawer, and the type should be **Final Voucher**.)

Submit to Doc Express®

×

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

Select a Doc Express® drawer for this payment

Select required type(s)

No types

Submit

Go Back

Pre-July 2025 Letting – Drawer and Types

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Select

Change Order

Contract Documents

Estimates and Vouchers

Project Closeout

Submit

Go Back

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

Select type(s)

Final Estimate

Final Forms Checklist (6.110 Attachment F)

Final Payment (Form 830436)

Final Voucher

Interest Payment Information (Form 830236)

Submit to Doc Express®

×

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

Select a Doc Express® drawer for this payment

Project Closeout

▼

Select

Change Order

Contract Documentation

Contract Signing

Environmental

Estimate Payments

Items and Materials Documentation

Payrolls

Plans

Project Closeout

Shop & working Drawings

Traffic Control

Weekly Reports

Working

Submit to Doc Express®

×

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

Select a Doc Express® drawer for this payment

Project Closeout

▼

Select required type(s)

Select type(s)

▲

Final Forms Checklist (6.110 Attachment F)

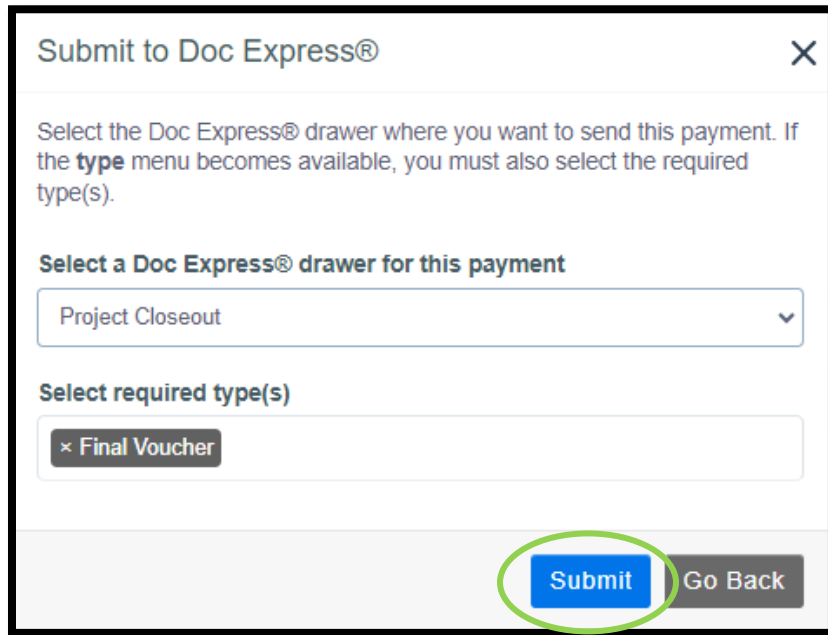
Final Payment (Form 830436)

Final Voucher

Interest Payment Information (Form 830236)

▼

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



Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

× Final Voucher

Submit Go Back

You will be returned to the Payment screen where a green ribbon will appear at the top saying, “The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully.”

For the remainder of the approval process in both Doc Express and Appia, follow the instructions in subsection [Submitting Payment for Approval](#) within section [Approving & Submitting and Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#). Note, you will pick up mid-way through the [Submitting Payments for Approval](#) subsection after the instructions for submitting to Doc Express (similar to those shown in this section).

The Payments screen will now show Appia's Final Payment with a red "Final Payment" icon.



05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

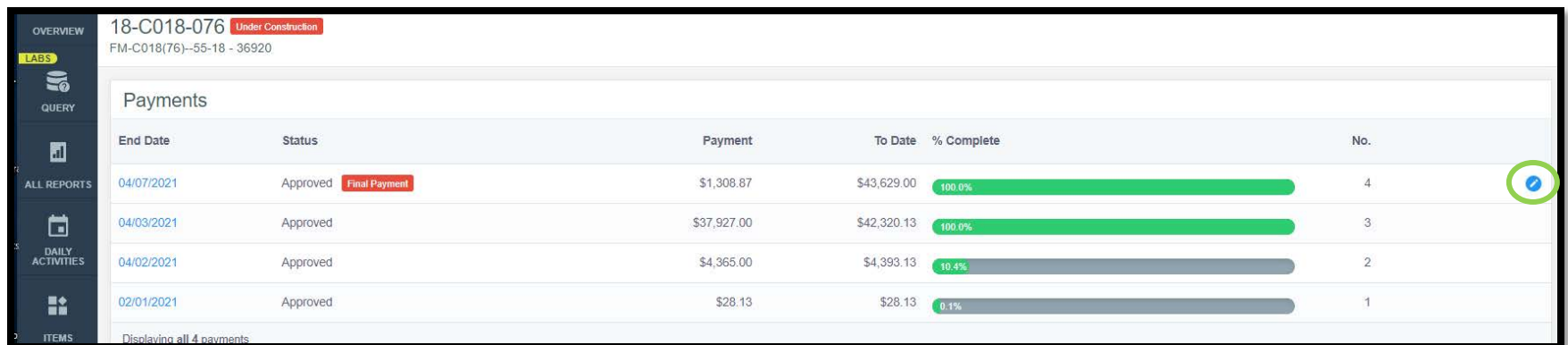
Payments

End Date	Status	Payment	To Date	% Complete	No.
01/15/2024	Approved Doc Express Final Payment	\$30,000.00	\$1,710,823.63	100.0%	4
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

Displaying all 4 payments

The last step is marking the payment as "Paid". This action will move your project to the "Completed" status, so it will no longer be listed with the projects in the "Under Construction" status. Make sure everything is complete before performing this action. **THIS ACTION CANNOT BE UNDONE. Make sure you have received Proof of Payment and the Administering Team has fully closed out the project before marking the final payment as "Paid".**

When ready, click on the blue circle icon with the pencil (shown above) to edit the payment information.



OVERVIEW 18-C018-076 Under Construction
LABS FM-C018(76)--55-18 - 36920

Payments

End Date	Status	Payment	To Date	% Complete	No.
04/07/2021	Approved Final Payment	\$1,308.87	\$43,629.00	100.0%	4
04/03/2021	Approved	\$37,927.00	\$42,320.13	100.0%	3
04/02/2021	Approved	\$4,365.00	\$4,393.13	10.4%	2
02/01/2021	Approved	\$28.13	\$28.13	0.1%	1

Displaying all 4 payments

In the payment overview screen, enter the “Payment Date”, and then click the blue “Save” button to the right. Last, click the blue “Mark as Paid” button in the top, right corner.

18-C018-076 Under Construction
FM-C018(76)--55-18 - 36920

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES ITEMS MATERIALS STOCKPILES

OVERVIEW WORK PERFORMED

This is your final payment.

Edit Final Payment Save Cancel

Payment Details

Payment Number	4	Percent Complete	100.0%
Payment Status	Approved	Item Payment Amount	\$0.00

Project Details

Prime Contractor
INROADS, LLC.

Pay Period

* From Date	04/04/2021	* To Date	04/07/2021
-------------	------------	-----------	------------

Payment Dates

Approval Date		Payment Date	04/07/2021
---------------	--	--------------	------------

A pop-up box will appear saying, “Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?”. Click “Ok”.

demo2.appia.net says

Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?

OK Cancel

Your project is automatically moved to “Completed” status and will be listed there now.

Congratulations!!! You have successfully completed a project in Appia!

3) Appia's Final Payment Process – Without Balancing Change Order

AFTER the Administering Team has verified that the project is complete and all necessary reviews and audits have been completed, you may begin Appia's final payment process. To begin the process, click on the "Issue final payment" link on the Payments screen.

The screenshot shows the Appia Payments screen for project 05-C005-074. The page header includes the project name and a red 'Under Construction' tag. Below the header, there is a 'Payments' section with an 'Add' button. A blue button labeled 'Issue final payment?' is highlighted with a green circle. Below this button is a table with the following data:

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	96.3%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	95.3%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.5%	1

Displaying all 3 payments

***Note: Appia's final payment cannot be completed on the same day as a regular payment. Therefore, you must wait at least one day after approving a normal payment to issue Appia's final payment, or you can adjust your normal payment so that the "To Date" does not include the current day.

This screen should appear. If the box was checked for the “Final Balancing Change Order Rule” in the Project Settings, a balancing change order will be required. If this is the case, see the [Appia’s Final Payment Process – Including Balancing Change Order](#) section. If the box was unchecked, the item for “All items are balanced” will be absent, and no balancing change order will be required to generate the final payment. If this is the case, follow the guidance in this section. (See the Default Settings: Projects Settings and/or Project Settings sections of the [Appia Project Creation & Account Management Instructions](#) for further guidance on the final balancing change order setting.)

The first step will be marking all items complete. Click on the blue “Complete items” link.

Projects / 16-C016-115 / Payments / Final Payment

16-C016-115 Under Construction

BROS-SWAP-C016(115)--SE-16, Acct ID- 38911, Letting Date- November 15, 2022

Final Payment

Final payment cannot be made until...

- ❗ All items are completed.
Items must be completed to ensure correct payment adjustments. [Complete items?](#)
- ✅ All punch list tasks are completed.
Done.
- ✅ All stockpiles are fully recovered.
Done.
- ❗ All time limits are completed.
Time limits must be completed. [Complete time limits?](#)

Items are not balanced. This does not prevent the final payment from being created. [Balance items?](#)

Create Final Payment

This screen will come up. Check the “Items” box in the upper, left corner to select all items. Then, click the blue “Save” button at the bottom or in the top, right corner.

OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE

25-C025-118 Under Construction

FM-C025(118)--55-25: Acct ID 37059, Letting Date: August 18, 2020

☒ Items

Save

Balance Items

Cancel

Items should be selected in order to balance items or to save as complete. Balancing items will create a new change order.

Line Number	Item ID	Unit	Description	Complete?
<input checked="" type="checkbox"/> Section: 0001 - Roadway Items				
<input checked="" type="checkbox"/> 0010	2121-7425020	TON	GRANULAR SHOULDERS, TYPE B	No
<input checked="" type="checkbox"/> 0020	2210-0475105	TON	CHOKE STONE BASE	No
<input checked="" type="checkbox"/> 0030	2210-0475290	TON	MACADAM STONE BASE	No
<input checked="" type="checkbox"/> 0040	2213-2713300	CY	EXCAVATION, CLASS 13, FOR WIDENING	No
<input checked="" type="checkbox"/> 0050	2303-1031500	TON	HOT MIX ASPHALT STANDARD TRAFFIC, BASE COURSE, 1/2 IN. MIX	No
<input checked="" type="checkbox"/> 0060	2303-1258283	TON	ASPHALT BINDER, PG 58-28S, STANDARD TRAFFIC	No
<input checked="" type="checkbox"/> 0070	2303-6911000	LS	HOT MIX ASPHALT PAVEMENT SAMPLES	No
<input checked="" type="checkbox"/> 0080	2502-8212034	LF	SUBDRAIN, LONGITUDINAL, (SHOULDER) 4 IN. DIA.	No
<input checked="" type="checkbox"/> 0090	2502-8225010	EACH	SUBDRAIN OUTLET, 500-10	No
<input checked="" type="checkbox"/> 0100	2528-8445110	LS	TRAFFIC CONTROL	No
<input checked="" type="checkbox"/> 0110	2528-8445113	EACH	FLAGGERS	No
<input checked="" type="checkbox"/> 0120	2533-4980005	LS	MOBILIZATION	No

Save


Balance Items

Continue completing any remaining steps in Appia's final payment process for punch lists and stockpiles. (Reminder: To get here, go to Payments and then click on the "Issue final payment" link.) Last, follow the "Complete time limits?" link to mark Time Limits as complete.

Projects / 16-C016-115 / Payments / Final Payment

16-C016-115 Under Construction

BROS-SWAP-C016(115)--SE-16, Acct ID- 38911, Letting Date- November 15, 2022



Final Payment

Final payment cannot be made until...

- ✓ All items are completed.
Done.
- ✓ All punch list tasks are completed.
Done.
- ✓ All stockpiles are fully recovered.
Done.
- ! All time limits are completed.
Time limits must be completed. [Complete time limits?](#)

Items are not balanced. This does not prevent the final payment from being created. [Balance items?](#)

Create Final Payment

Clicking on the “Complete time limits?” link will bring you to the Time Limits section. Click on the blue text of the name of the appropriate time limit and then on the “Edit” button in the next screen to edit the time limits data.

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Time Limits

Time limit name	Type	Completed	Status	Days remaining
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	0.0%	Not Started	35.0

Displaying 1 time limit

05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

Time Limit

Edit Cancel

Description	Type	Status
Working Days, Late Start Date - 08/29/2022, Liquidated Damage Rate - 1,000	Working Days	Not Started

Original Days Allowed	Liquidated Damages/Day	Authorized Days Allowed
35.0	\$0.00	35.0

In the editing screen, click on the “Work Completed” toggle to mark it as “Yes”. Then click the blue “Save” button in the top, right corner.

Edit

Working Days

Description
Working Days, Late Start Date: 09/21/20, Liquidated Damages: \$1,000.00

Start Date
09/11/2020

Work Completed
09/14/2020

Days Charged
1.5

Liquidated Damages/Day
\$0.00

Days Remaining
23.5

Total Liquidated Damages
\$0.00

Primary Deadline?
☒ YES

Work Completed?
☒ YES

Calendar: April 2021

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

Return to the final payment.

Payments

[Issue final payment?](#)

End Date	Status	Payment	To Date	% Complete	No.
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

When all tasks in the “Issue final payments screen have been completed”, it will bring you to the payment screen, and a ribbon across the top will say, “The payment has been saved successfully.” Review the details in the payment and then click on the blue “Submit for Approval” button in the top, right corner, and choose the “Submit to Doc Express” option from the drop-down menu.

The payment has been saved successfully.

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

Projects / 05-C005-074 / Payments / Payment #4 / Edit

05-C005-074 Under Construction

FM-C005(74)-55-05, Acct ID- 38251, Letting Date- January 19, 2022

OVERVIEW SUMMARY WORK PERFORMED ATTACHMENTS

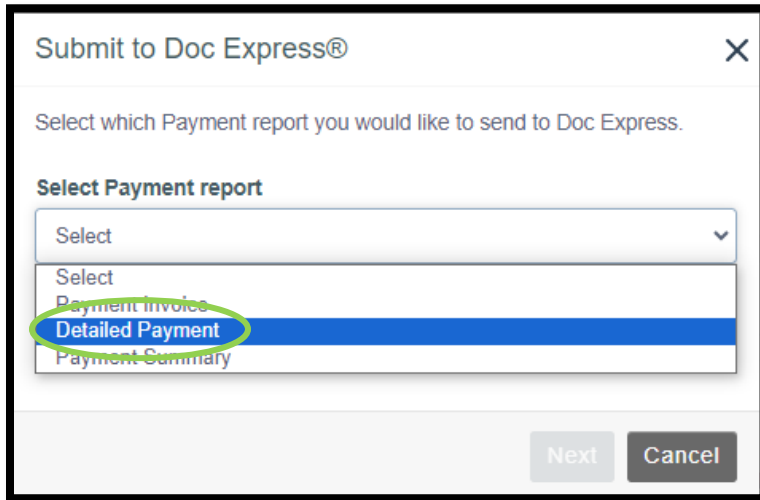
This is your final payment.

Edit Final Payment Save Cancel

Payment Details		Project Details	
Payment Number	Percent Complete	Prime Contractor	
4	100.0%	HENNINGSEN CONSTRUCTION, INC.	
Payment Status	Item Payment Amount		
Draft	\$0.00		

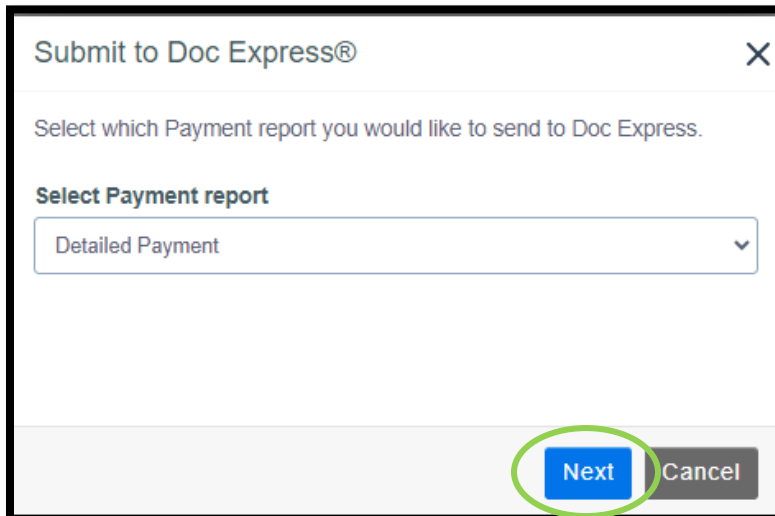
Pay Period		Payment Dates	
* From Date	* To Date	Approval Date	Payment Date
01/03/2024	01/15/2024		

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



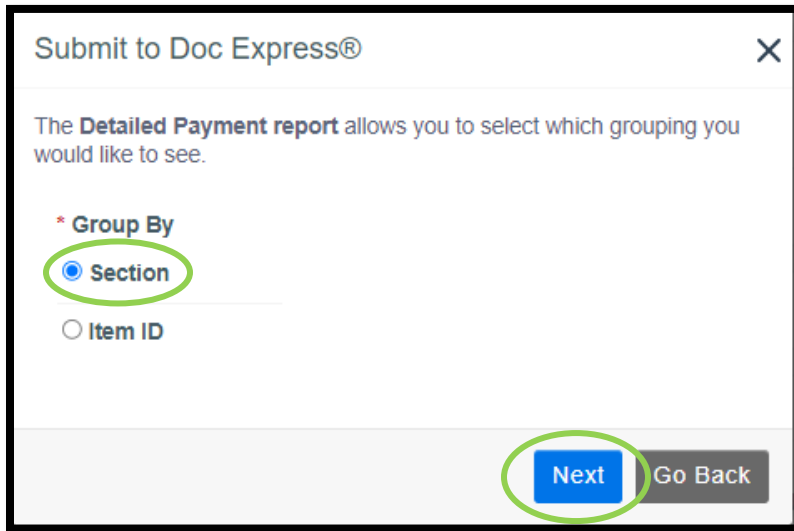
The screenshot shows a pop-up window titled "Submit to Doc Express®" with a close button (X) in the top right corner. Below the title bar, there is a text prompt: "Select which Payment report you would like to send to Doc Express." Underneath this is a section labeled "Select Payment report" containing a dropdown menu. The dropdown menu is open, showing four options: "Select", "Payment Invoice", "Detailed Payment", and "Payment Summary". The "Detailed Payment" option is highlighted with a blue background and is circled with a green oval. At the bottom right of the window, there are two buttons: a light gray "Next" button and a dark gray "Cancel" button.

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



This screenshot shows the same "Submit to Doc Express®" pop-up window. The dropdown menu now displays "Detailed Payment" as the selected option. The "Next" button, which is blue, is circled with a green oval at the bottom right of the window, next to the gray "Cancel" button.

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



Submit to Doc Express®

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

* Group By

☒ Section

☐ Item ID

Next Go Back

A third pop-up box with pull-down menus will appear where you will select the appropriate Doc Express drawer and type for the document you are submitting. Please reference the Doc Express Naming Convention to determine the appropriate drawer and type for selection. (Note: The naming convention will show, for the Final Payment, the drawer should be the **Project Closeout** drawer, and the type should be **Final Voucher**.)

Submit to Doc Express®

×

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

Select a Doc Express® drawer for this payment

Select required type(s)

No types

Submit

Go Back

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Select

Change Order

Contract Documents

Estimates and Vouchers

Project Closeout

Submit

Go Back

Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

Select type(s)

Final Estimate

Final Forms Checklist (6.110 Attachment F)

Final Payment (Form 830436)

Final Voucher

Interest Payment Information (Form 830236)

Submit to Doc Express®

×

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

Select a Doc Express® drawer for this payment

Project Closeout

▼

Select

Change Order

Contract Documentation

Contract Signing

Environmental

Estimate Payments

Items and Materials Documentation

Payrolls

Plans

Project Closeout

Shop & working Drawings

Traffic Control

Weekly Reports

Working

Submit to Doc Express®

×

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

Select a Doc Express® drawer for this payment

Project Closeout

▼

Select required type(s)

Select type(s)

▲

Final Forms Checklist (6.110 Attachment F)

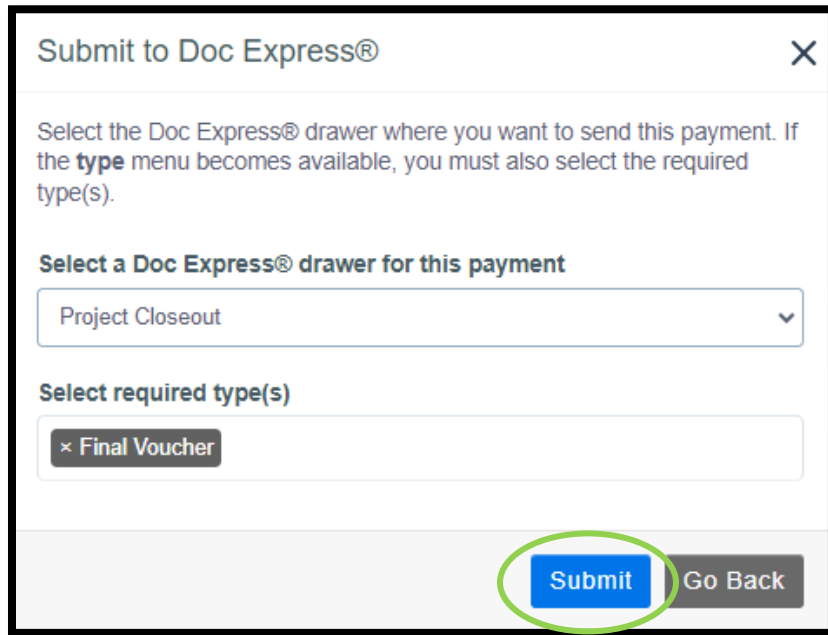
Final Payment (Form 830436)

Final Voucher

Interest Payment Information (Form 830236)

▼

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



Submit to Doc Express®

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

Select a Doc Express® drawer for this payment

Project Closeout

Select required type(s)

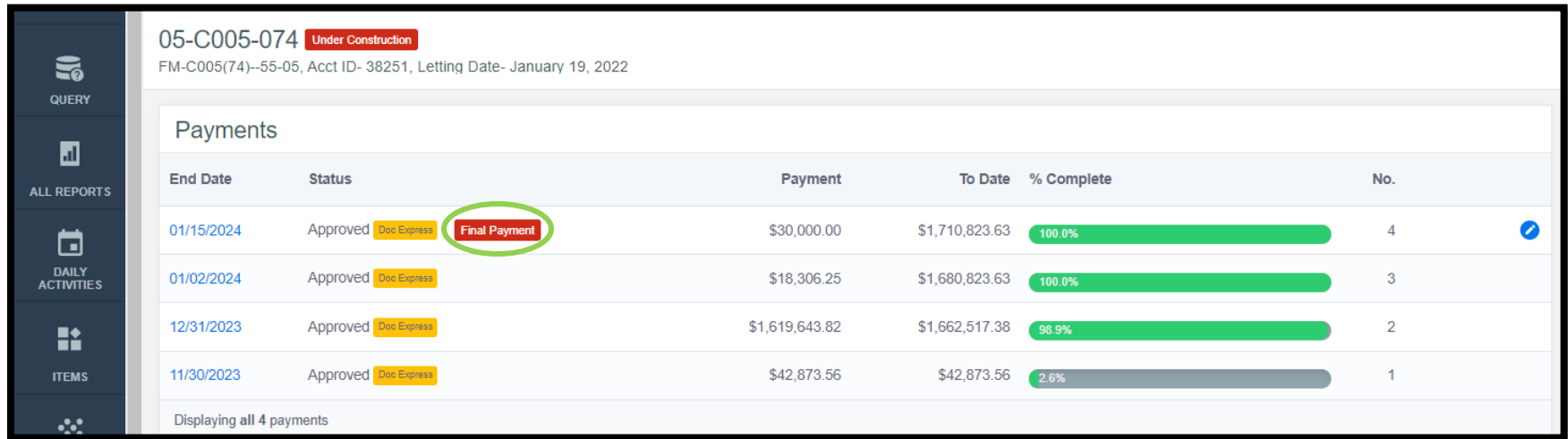
× Final Voucher

Submit Go Back

You will be returned to the Payment screen where a green ribbon will appear at the top saying, “The payment has been submitted for approval successfully. The payment report has been sent to Doc Express® successfully.”

For the remainder of the approval process in both Doc Express and Appia, follow the instructions in subsection [Submitting Payment for Approval](#) within section [Approving & Submitting and Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#). Note, you will pick up mid-way through the [Submitting Payments for Approval](#) subsection after the instructions for submitting to Doc Express (similar to those shown in this section).

The Payments screen will now show Appia's Final Payment with a red "Final Payment" icon.



05-C005-074 Under Construction
FM-C005(74)--55-05, Acct ID- 38251, Letting Date- January 19, 2022

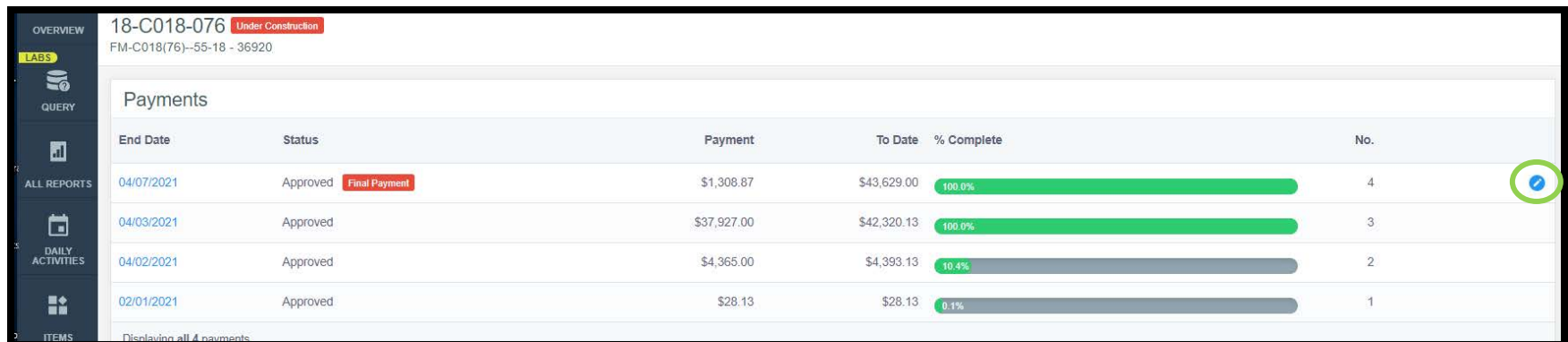
Payments

End Date	Status	Payment	To Date	% Complete	No.
01/15/2024	Approved Doc Express Final Payment	\$30,000.00	\$1,710,823.63	100.0%	4
01/02/2024	Approved Doc Express	\$18,306.25	\$1,680,823.63	100.0%	3
12/31/2023	Approved Doc Express	\$1,619,643.82	\$1,662,517.38	98.9%	2
11/30/2023	Approved Doc Express	\$42,873.56	\$42,873.56	2.6%	1

Displaying all 4 payments

The last step is marking the payment as "Paid". This action will move your project to the "Completed" status, so it will no longer be listed with the projects in the "Under Construction" status. Make sure everything is complete before performing this action. **THIS ACTION CANNOT BE UNDONE. Make sure you have received Proof of Payment and the Administering Team has fully closed out the project before marking the final payment as "Paid".**

When ready, click on the blue circle icon with the pencil (shown above) to edit the payment information.



18-C018-076 Under Construction
FM-C018(76)--55-18 - 36920

Payments

End Date	Status	Payment	To Date	% Complete	No.
04/07/2021	Approved Final Payment	\$1,308.87	\$43,629.00	100.0%	4
04/03/2021	Approved	\$37,927.00	\$42,320.13	100.0%	3
04/02/2021	Approved	\$4,365.00	\$4,393.13	10.4%	2
02/01/2021	Approved	\$28.13	\$28.13	0.1%	1

Displaying all 4 payments

In the payment overview screen, enter the “Payment Date”, and then click the blue “Save” button to the right. Last, click the blue “Mark as Paid” button in the top, right corner.

18-C018-076 Under Construction
FM-C018(76)--55-18 - 36920

OVERVIEW WORK PERFORMED

This is your final payment.

Edit Final Payment Save Cancel

Payment Details

Payment Number	4	Percent Complete	100.0%
Payment Status	Approved	Item Payment Amount	\$0.00

Project Details

Prime Contractor
INROADS, LLC.

Pay Period

* From Date	04/04/2021	* To Date	04/07/2021
-------------	------------	-----------	------------

Payment Dates

Approval Date		Payment Date	04/07/2021
---------------	--	--------------	------------

A pop-up box will appear saying, “Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?”. Click “Ok”.

demo2.appia.net says

Once the payment has been marked as paid, it cannot be undone. Are you sure you want to continue?

OK Cancel

Your project is automatically moved to “Completed” status and will be listed there now.

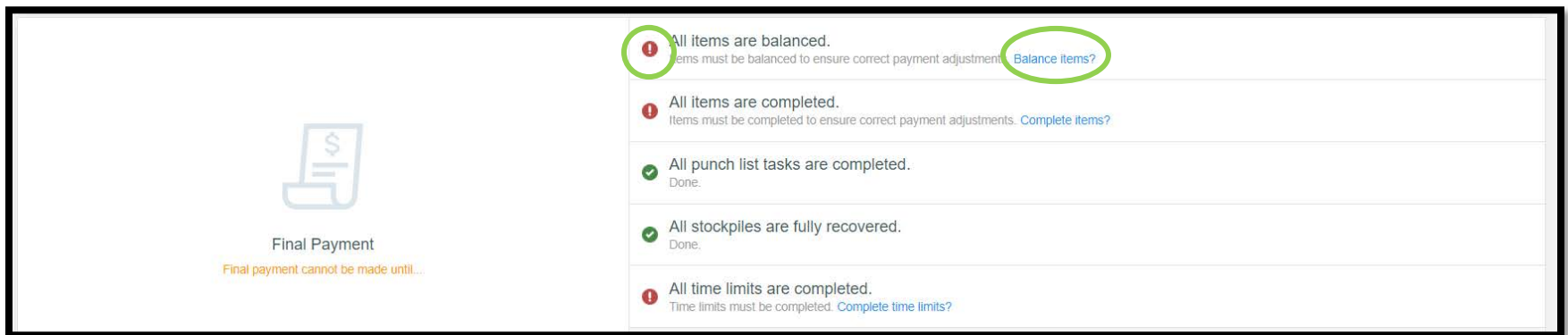
Congratulations!!! You have successfully completed a project in Appia!

4) [Troubleshooting Common Final Payment Issues](#)



Can't get items to show as "Balanced"

If the setting was left checked for "Require Final Balancing Change Order on Final Payment" and the Final Payment screen is still showing that you need to balance items, it is likely because you had some items identified as true Lump Sum items that did not get fully paid. For these items, you will need to create a change order to bring the unit price of each of the Lump Sum items to \$0.00 (if the item was not used) or to the appropriate final price for the item. To create a change order, see the [Change Orders](#) section.

After creating a change order to zero out/adjust the unit price of the Lump Sum items, create an Item Posting in a Daily Report for 1.000 units of each item. Do this even if less than 1.000 units of the item were completed. The unit price set in the change order is the new total item price.



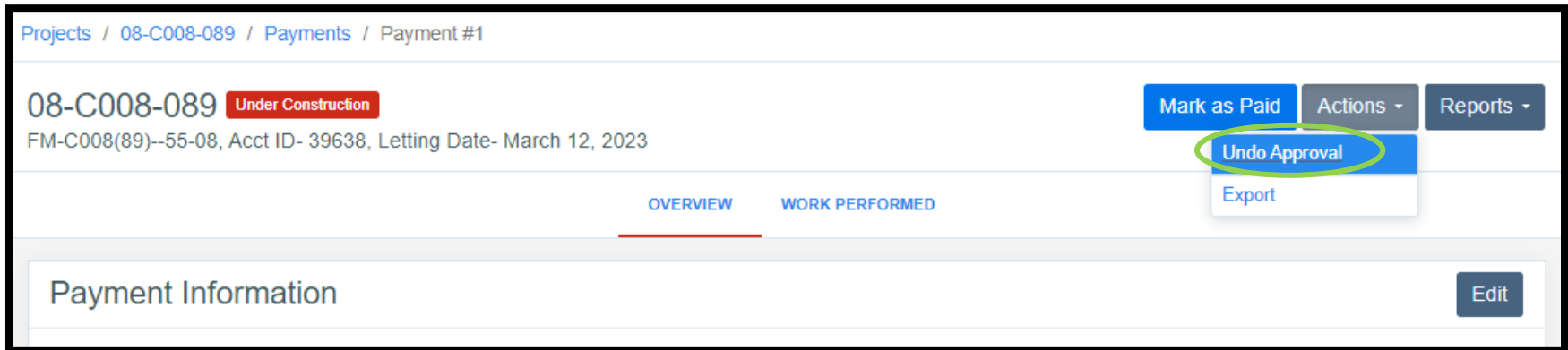
I have a Daily Report that has been excluded, and Appia won't let me issue final payment. However, it won't let me edit my Daily Report. Go to the Payments screen. Delete the final payment by clicking on the red "x" at the right end of the line containing the payment. Now, you should be able to edit (approve or delete) the excluded Daily Report. After editing the Daily Report, re-do the Final Payment.

Payments						
End Date	Status	Payment	To Date	% Complete	No.	
07/19/2023	Draft Final Payment	\$120.15	\$4,005.00	100.0%	3	 
04/15/2023	Paid	\$761.45	\$3,884.85	100.0%	2	
04/04/2023	Paid	\$3,123.40	\$3,123.40	80.4%	1	

K. Editing a Payment

If you ever navigate away from the payments screen and need to get back in to edit a payment, simply go to the Payments tab on the left and then click on the blue circle with the pencil on the right side of the line containing the payment you want to edit. Payments can be edited until a payment date is entered. **Once a payment is marked as “Paid”, it cannot be un-approved or edited.**

Payments can be edited, even after they have been approved, **but they should not be edited after a payment has been made.** To edit an already-approved payment, first un-approve the payment by clicking on the “Actions” pull-down in the Payment and selecting “Undo Approval”.



Projects / 08-C008-089 / Payments / Payment #1

08-C008-089 Under Construction

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

OVERVIEW WORK PERFORMED

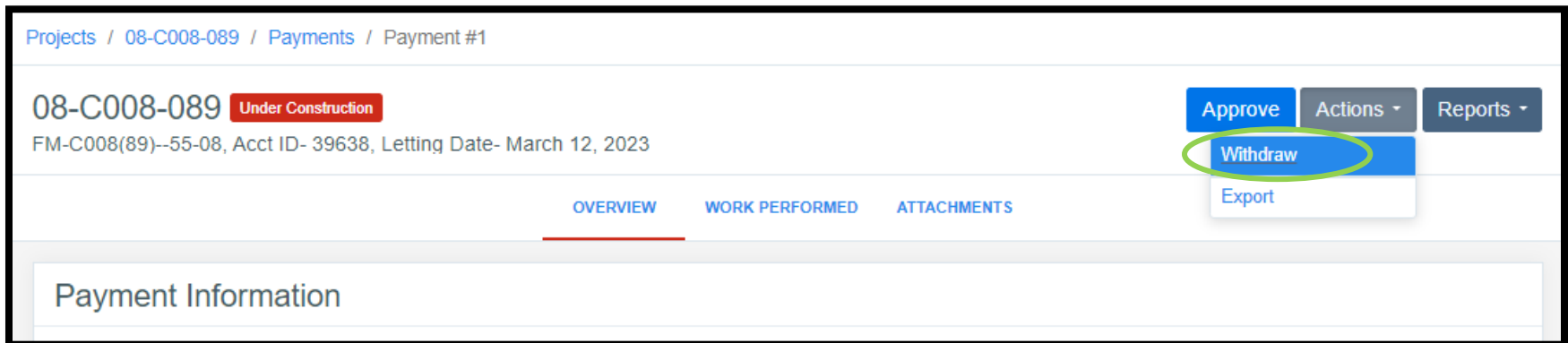
Payment Information Edit

Mark as Paid Actions Reports

Undo Approval

Export

Then, go to the “Actions” pull-down again, and select “Withdraw”.



Projects / 08-C008-089 / Payments / Payment #1

08-C008-089 Under Construction

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

OVERVIEW WORK PERFORMED ATTACHMENTS

Payment Information

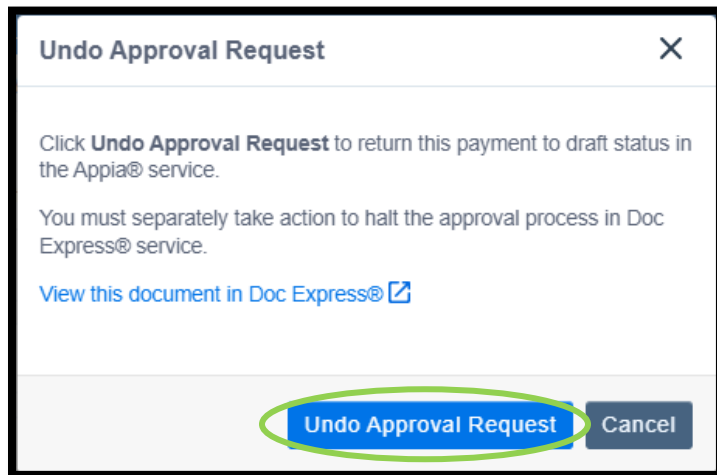
Approve Actions Reports

Withdraw

Export

If the payment was submitted for approval in Appia, the withdrawal action will take place as soon as you click on Withdraw.

If the payment has been submitted to Doc Express via Appia, a box will pop up telling you that you have to take separate action to halt the approval process in Doc Express. Click the blue “Undo Approval Request” button in the lower, right corner of the box.



Edit the payment as appropriate.

When the editing is finished, repeat the “Submit for Approval” step.

For projects using the “Submit to Doc Express” option, the revised document will be sent to Doc Express again. In Doc Express, the original document will still show, and the revised document will now appear having a “-Rev#” at the end of the file name.

The screenshot displays the 'Estimates and Vouchers' interface. At the top, there is a header with the title 'Estimates and Vouchers' and a navigation menu. Below the header, a project identifier '08-C008-089 - Boone County | FM-C008(89)--55-08 | RCB Culvert Replacemen...' is visible. The main content area shows two entries. The first entry, 'payment-1-20231204-Rev1', is circled in green and includes a 'Progress Voucher' button and an 'update' button. Below it, the text 'Iowa Local Systems _DEMO ACCOUNT' and 'Transition / Actions' are shown. The second entry, 'Voucher 001', is circled in red and also includes a 'Progress Voucher' button. Below it, the text 'Iowa Local Systems _DEMO ACCOUNT' and 'Actions' are shown. A 'Submit' button is located at the top right of the interface. A date and time stamp 'Dec 07 2023 02:40 PM EST Submit Version 1 (current) Iowa Local Systems _DEMO ACCOUNT - Nicole Stinn' is displayed between the two entries.

Transition it to “Complete”, and refresh the Payment in Appia to bring back in the updated status as advised in the [Submitting Payments for Approval](#) subsection under the [Approving & Submitting an Automated Payment - FOR COUNTY FM PROJECTS LET ON OR AFTER JANUARY 2024 ONLY](#) section.

Send a request to the Local Systems E-Construction administrator to delete or archive the prior created incorrect payment.

County projects on the Farm-to-Market system let on or after the January 2024 letting are subject to the automated payment process. For these projects, do NOT un-approve a payment and edit it after the Wednesday at noon submittal deadline unless instructed to do so by Finance or Local Systems or without notifying Niki Stinn in Local Systems. Un-approving a payment that has already been automatically submitted for processing may result in errors or delay of payment processing or in a payment being processed that shouldn't be processed.

A payment can be deleted by clicking on the circle with the red “x” on the right side of the line.



OVERVIEW

LABS

QUERY

ALL REPORTS

DAILY ACTIVITIES

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

Gladbrook Bridge Replacement Letting Date: October 21, 2014

Payments

End Date	Status	Payment	To Date	% Complete	No.
01/28/2019	Draft	\$65,415.25	\$72,753.30	5.1%	2
01/02/2019	Approved	\$7,338.05	\$7,338.05	0.5%	1

Displaying all 2 payments

L. Generating a Payment Report (Payment)

Payment reports are NOT generated from the “All Reports” tab. Instead, they are generated from the “Payments” tab. To generate a payment report, click into the relevant payment and then click on the “Reports” pull-down in the top, right corner. LPAs can choose any of the reports they want for their own purposes, but the “Detailed Payment” report should be used for submittals to the Iowa DOT (reimbursement requests and CPS submittals) unless requested otherwise by the Finance Bureau or the Administering Team. Any payment report chosen can be downloaded and saved and then uploaded to Doc Express.

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES

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

Mark as Paid Actions Reports

OVERVIEW EXCLUSIONS WORK PERFORMED

Payment Information

Payment Details		Project Details	
Payment Number	Percent Complete	Prime Contractor	Project Manager
2	5.1%	PETERSON CONTRACTORS INC.	Nicole Stinn

Once the “Detailed Payment” report type is chosen from the drop-down menu, the following screen will appear. Select the “Section” radio button and then click the “Run Report” button in the top, right corner.

Projects / 29-C029-086 / Payments / Payment #1 / Detailed Payment

29-C029-086 Under Construction
BRS-SWAP-C029(86)--FF-29, Acct ID- 38636, FM-C029(90)--55-29, Acct ID- 38637, Letting Date- May 17, 2022

Detailed Payment

Run Report Cancel

* Group By

☒ Section

☐ Item ID

Additionally, a .csv payment report can be exported by choosing the “Actions” pull-down in the top, right corner and selecting “Export”.

The screenshot displays a software interface for project management. At the top, the project ID is BROS-C086(60)--8J-86 - 31961, with a status of 'Under Construction'. Below this, the project name 'Gladbrook Bridge Replacement' and its letting date 'October 21, 2014' are shown. The interface includes a sidebar with navigation options like OVERVIEW, LABS, QUERY, ALL REPORTS, and DAILY ACTIVITIES. The main content area is divided into two sections: 'Payment Information' and 'Project Details'. The 'Payment Information' section contains a table with payment details, and the 'Project Details' section lists the prime contractor and managing office. The 'Actions' dropdown menu is open in the top right corner, showing options like 'Mark as Paid', 'Undo Approval', and 'Export', with 'Export' being the selected option.

OVERVIEW LABS QUERY ALL REPORTS DAILY ACTIVITIES

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

OVERVIEW EXCLUSIONS WORK PERFORMED

Payment Information Edit

Payment Details	
Payment Number	Percent Complete
2	5.1%
Payment Status	Item Payment Amount
Approved	\$67,438.40

Project Details	
Prime Contractor	Project Manager
PETERSON CONTRACTORS INC.	Nicole Stinn
Managing Office	
Tama County Highway Department	

Mark as Paid Actions Reports
Undo Approval
Export

A few sample pages of the “Detailed Payment” report are shown here.



Tama County Highway Department

Detailed Payment

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

Description Gladbrook Bridge Replacement
Letting Date: October 21, 2014

Payment Number 2

Pay Period 01/03/2019 to 01/28/2019

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

Payment Status Approved

Awarded Project Amount \$1,457,851.99

Authorized Amount \$1,457,851.99

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
Section: 1 - ITEMS FOR A 244'-0 X 30'-0 PRETENSIONED PRESTRESSED CONCRETE BEAM BRIDGE										
0010	2104-2710020	CY	\$4.500	5,700.000	1,066.667	0.000	1,066.667	1,066.667	\$4,800.00	\$4,800.00
EXCAVATION, CL 10, CHANNEL										

Detailed Payment:
BROS-C086(60)--8J-86 - 31961

04/06/2021
Page 1 of 9

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
0120	2501-0201057	LF	\$33.350	1,260.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
PILES, STEEL, HP 10 X 57										
0130	2501-0201473	LF	\$39.480	1,540.000	770.000	0.000	770.000	770.000	\$30,399.60	\$30,399.60
PILES, STEEL, HP 14 X 73										
0140	2501-5478073	LF	\$76.100	396.000	408.000	0.000	408.000	408.000	\$31,048.80	\$31,048.80
CONCRETE ENCASEMENT OF STEEL H PILES, HP 14 X 73										
0150	2501-6335010	LF	\$38.620	180.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
PREBORED HOLE										
0160	2507-2638650	SY	\$109.700	27.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
BRIDGE WING ARMORING - EROSION STONE										
0170	2507-3250005	SY	\$2.500	2,805.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
ENGINEERING FABRIC										
0180	2507-6800061	TON	\$33.000	2,180.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
REVTMENT, CLASS E										
0190	2533-4980005	LS	\$82,187.500	1.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
MOBILIZATION										
0200	2536-6745045	LS	\$6,300.000	1.000	0.000	0.000	0.000	0.000	\$0.00	\$0.00
RMVL OF ASBESTOS										
Section Totals:									\$66,248.40	\$66,248.40
Section: 2 - ROADWAY ITEMS										

Detailed Payment:
BROS-C086(60)--8J-86 - 31961

04/06/2021
Page 3 of 9

Line Number	Item ID	Unit	Unit Price	Authorized Quantity	Current Paid Quantity	Previous Paid Quantity	Total Quantity Paid To Date	Total Quantity Placed To Date	Current Payment Amount	Total Amount Paid To Date
Total Payments:									\$67,438.40	\$75,003.40

Time Charges

Time Limit	Original Deadline	Authorized Deadline	Charges This Period	Damages This Period	Days Completed To Date	Days Remaining To Date	Damages To Date
Late Start Date: 04/16/15	120.0 Days	120.0 Days	0.0 Days	\$0.00	0.0 Days	120.0 Days	\$0.00
Total Damages:							\$0.00

Summary

Current Approved Work:	\$67,438.40	Approved Work To Date:	\$75,003.40
Current Stockpile Advancement:	\$0.00	Stockpile Advancement To Date:	\$0.00
Current Stockpile Recovery:	\$0.00	Stockpile Recovery To Date:	\$0.00
Current Retainage:	\$2,023.15	Retainage To Date:	\$2,250.10
Current Retainage Released:	\$0.00	Retainage Released To Date:	\$0.00
Current Liquidated Damages:	\$0.00	Liquidated Damages To Date:	\$0.00
Current Adjustment:	\$0.00	Adjustments To Date:	\$0.00
Current Payment:	\$65,415.25	Payments To Date:	\$72,753.30
Previous Payment:	\$7,338.05	Previous Payments To Date:	\$7,338.05

Detailed Payment:
BROS-C086(60)--8J-86 - 31961

04/06/2021
Page 8 of 9

Note: A "Stockpiles" section will be shown on this final page as well if any stockpile entries have been made.

13 - Contractors

(Reserved for Contractors instructions)

This section is reserved for future instructions on the Contractors tab.

14 - Funding

To access the Funding details click on the “Funding” tab in the left menu.

The screenshot displays a software interface with a dark blue sidebar on the left containing various navigation tabs. The 'FUNDING' tab is highlighted with a red background and a green circle. The main content area is divided into three sections: a top section for project details, a middle section for important dates and progress, and a bottom section for financial metrics.

Left Menu Tabs:

- TIME LIMITS
- CHANGE ORDERS
- PUNCH LIST
- PAYMENTS
- CONTRACTORS
- FUNDING** (highlighted)
- PHOTOS
- MORE

Project Details:

- Prime Contractor: CEDAR VALLEY CORP., LLC.
- Project Manager: Niki Stinn
- Managing Office: Local Systems
- Created By: Douglas Heeren

Financial Summary:

- Amount paid so far: \$0.00
- 0% of your Awarded: \$4,553,445.96
- 0% of your Authorized: \$4,580,158.96
- 0%

Important Dates:

- Date Created: Dec 5, 2022
- Notice to Proceed: Dec 20, 2022

Progress:

- Time Complete: 0 Days | Time Remaining: 82 Days
- 0%
- Amount Posted: \$300.00 | Awarded Amount: \$4,553,445.96
- 0%
- Amount Posted: \$300.00 | Authorized Amount: \$4,580,158.96
- 0%

Financial Metrics:

- Total Retainage: \$0.00
- Retainage Released: \$0.00

Clicking on Funding in the left menu will bring you to the Funding screen. Existing funding packages, sources, and associated amounts will be displayed. These amounts should match the funding sources shown on the Final Highway Funding sources document in Doc Express. LPAs do not generally need to be concerned with exactly what the funding codes mean as long as the values and proportions look generally correct. However, if the LPA does want/need to know about the exact funding source codes, please reach out to the Secondary Roads Engineer (counties) or the Urban Engineer (cities) in the [Local Systems Bureau](#).

Note: County FM funding will always be a CO##F or CO##F# code. Local county funding will be CO##L, and local city funding will be M####. With the ## or #### being the county or city number, respectively.

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

21-C021-153 Under Construction

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

Funding Edit

Fund Source	Fund Package	
	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	001 CLAY CO LOCAL 21-C021-153 001 CLAY CO FM 21-C021-154
CO21F	\$0.00 0.000%	\$0.00 0.000%
Y238	\$2,786,468.92 100.000%	\$0.00 0.000%
CO21F1	\$0.00 0.000%	\$0.00 0.000%
CO21L	\$0.00 0.000%	\$9,900.00 100.000%

Items

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS					
0010	2110-3825010	760.000	TON	\$7.900	\$6,004.00
GRANULAR MATERIAL					
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 760.000					
0020	2121-7425020	9,550.000	TON	\$32.760	\$312,858.00

Show funding in dollars? ☐ NO

To add a new funding package or edit an existing package, click on the blue “Edit” button in the top, right corner.

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

STOCKPILES

TIME LIMITS

CHANGE ORDERS

21-C021-153 Under Construction

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

Funding

Fund Source

Fund Package

	21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153	001 CLAY CO LOCAL 21-C021-153	001 CLAY CO FM 21-C021-154
CO21F	\$0.00 0.000%	\$0.00 0.000%	\$1,783,790.04 100.000%
Y238	\$2,786,468.92 100.000%	\$0.00 0.000%	\$0.00 0.000%
CO21F1	\$0.00 0.000%	\$0.00 0.000%	\$0.00 0.000%
CO21L	\$0.00 0.000%	\$9,900.00 100.000%	\$0.00 0.000%

Items

Line Number	Item ID	Quantity	Unit	Unit Price	Extension
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS					
0010	2110-3825010	760.000	TON	\$7.900	\$6,004.00
GRANULAR MATERIAL					
21-C021-153-CAT-1 21-C021-153-CAT-1 21-C021-153: 760.000					
0020	2121-7425020	9,550.000	TON	\$32.760	\$312,858.00

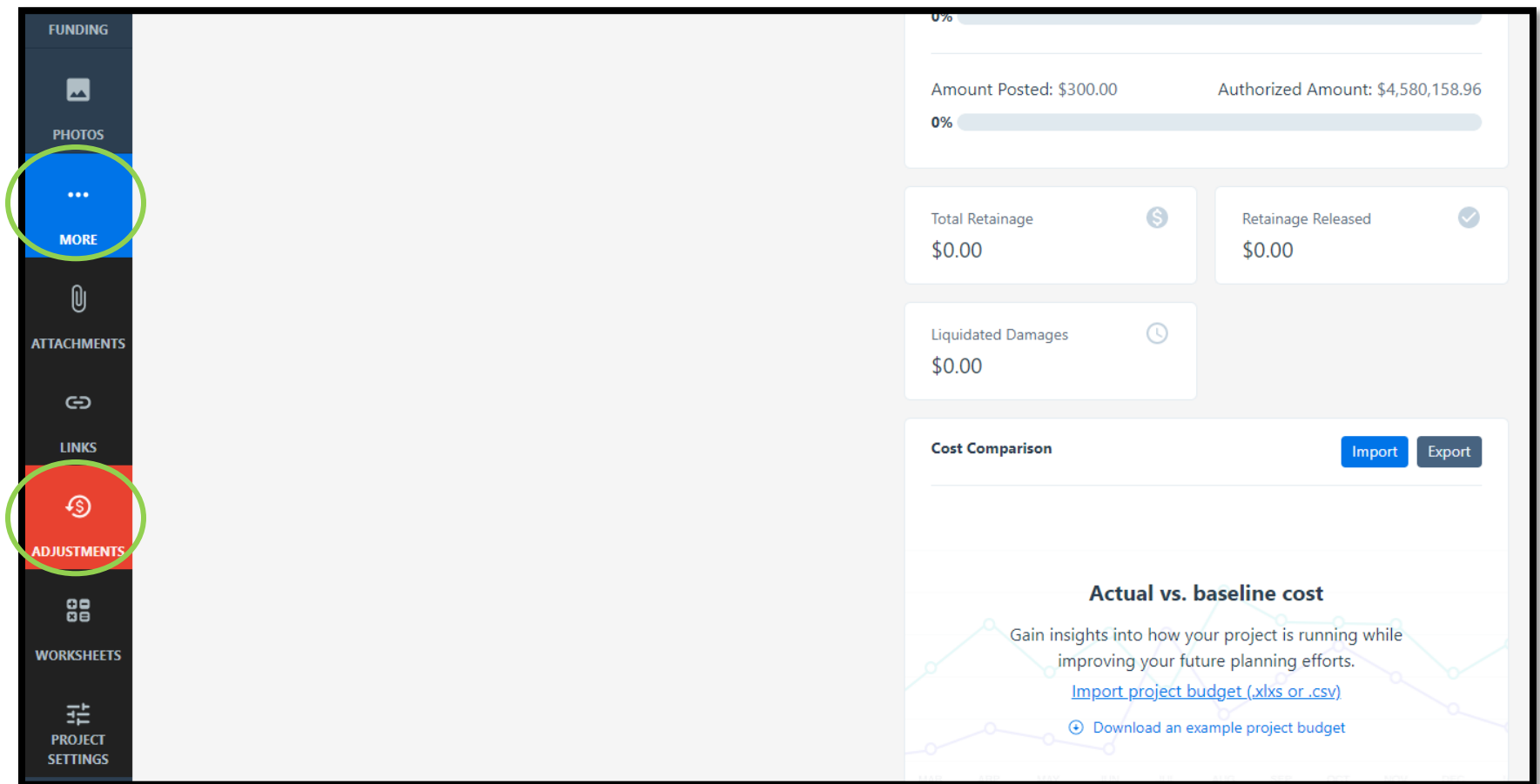
Show funding in dollars? ☐ NO

From this point, follow the guidance in Section 4 - Creating Funding Packages and Sources in the [Appia Project Creation & Account Management Instructions](#).

15 - More: Adjustments

Do NOT use Adjustments on ANY project administered through the Iowa DOT. The DOT requires any payment adjustments to be made via change order.

If using Adjustments for non-DOT administered projects, Adjustments can be accessed by clicking on More in the left menu and then selecting “Adjustments” from the expanded sub-menu.



16 - More: Worksheets

(Reserved for Worksheets instructions)

This section is reserved for future instructions on Worksheets.

17 - More: Project Settings

For instructions on adjusting project settings, please see the “Project Settings” section in the “[Project Creation and Account Management Instructions](#)” located on the [Doc Express and Appia](#) website under “Appia® Guides”.


The image is a screenshot of a web application's navigation menu. On the left, a dark blue sidebar contains the text "Local Systems" in white, which is circled in green. To the right of the sidebar is a light gray area with a grid of links. The links are arranged in two columns: "Local Systems Staff", "Pre-Letting Resources", and "Maps" on the left; "Local Systems Email Subscriptions", "Post-Letting Resources", and "Inspection Worksheets (E-Sheets)" on the right. Each link has a right-pointing arrow. Below this grid is a row of four light gray boxes, each with a title and a description. The titles are "Instructional Memorandums & Federal-Aid Guide", "Trainings & Videos", "IIJA Information", and "Doc Express & Appia". The descriptions provide more detail about each category. The "Doc Express & Appia" box is circled in green. At the bottom of the page, a dark blue circle contains the number "298".

Local Systems

- Local Systems Staff →
- Local Systems Email Subscriptions →
- Pre-Letting Resources →
- Post-Letting Resources →
- Maps →
- Inspection Worksheets (E-Sheets) →


Instructional Memorandums & Federal-Aid Guide

Resources and guides for local agencies on federal and non-federal aid transportation project planning and development.




Trainings & Videos

Iowa DOT Local Systems upcoming trainings, past presentations and videos.




IIJA Information

The Infrastructure Investment & Jobs Act is a U.S. law funding transportation, broadband, energy, and water protection.




Doc Express & Appia

Doc Express & Appia are secure, web-based applications used for construction administration, documentation & inspection.



298

Appia® Guides

- [Appia® Project Creation & Account Management Instructions](#) .pdf
- [Appia® "Under Construction" Instructions](#) .pdf
- [API Documentation](#) 
- [Worksheet Calculations](#) .pdf

18 - Exporting Data: Export Reports (For Audit/Review by Local Systems)

(System Administrator access level required.)

You can download specific reports for any given project at any time. Available reports include:

- Change Order Details
- Daily Report*
- Daily Diary
- Detailed Payment
- Item History
- Item Quantity Summary**
- Payment Invoice
- Payment Invoice by Fund (Fund Packages Only)
- Payment Invoice (with Fund Sources)
- Time Charges
- Worksheet History***

*This export will generate a file with PDF summaries of each of the daily reports. These PDFs can be merged together if desired.

** This export will generate a file with individual PDF summaries for each bid item with all of the item posting (quantity entry) information including any locations or remarks recorded. **When a project is ready for audit/review, the Local Systems field staff will require the local agency to upload each of these Item Quantity Summary reports to DocExpress.**

***This export will generate a file with individual PDF summaries for each of the bid items with the items' associated Worksheet entries. **If Worksheets are used, these Worksheet History summaries will need to be uploaded (per item) to DocExpress for audit.**

To download these reports, click on “Export Data” in the left menu on the main project listing screen. Then click on “Export Reports” in the expanded sub-menu.

The screenshot shows the 'Export Projects' interface. On the left is a dark sidebar with navigation icons and labels. The main area displays a table of projects with columns for Project ID, Description, and Project Status. A search bar is at the top of the table.

Sidebar Navigation:

- MY PROJECTS
- REFERENCE DATA
- SYSTEM MGT
- EXPORT DATA** (highlighted with a red circle)
- EXPORT DATABASE
- EXPORT PROJECTS
- EXPORT REPORTS** (highlighted with a red circle)
- HELP

Projects Table:

Project ID	Description	Project Status
03-C003-062 <small>Imported</small>	03-C003-062	Under Construction
11-C011-071 <small>Imported</small>	STP-S-C011(71)--SE-11 - 29427	Under Construction
36-C036-074 JSON TEST/FINANCE <small>Imported</small>		Under Construction
BHM-SWAP-1827(684)--SA-82-1 12345	Reconstruction Bridge Deck	Under Construction
BROS-C004(103)--8J-04 - 35155	On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.	Under Construction
BROS-C078(111)--FF-78_Payment for Multiple Sections	Letting Date 4/21/2020	Under Construction
BROS-C086(60)--8J-86 - 31961	Gladbrook Bridge Replacement Letting Date: October 21, 2014	Under Construction
BRS-C036(74)--60-36 - AcctID	Letting Date: 04/01/20	Under Construction
BRS-C036(74)--60-36 - AcctID_02_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_03_West01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_05_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_06_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_07_Central01	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction
BRS-C036(74)--60-36 - AcctID_07_West02	Description: RCB culvert replacement over Plum Creek Letting Date: February 21, 2017	Under Construction

You will be brought to this “Export Reports” screen. Select the desired project from the pull-down menu and enter the desired dates in the “Start Date” and “End Date” boxes. Reports will only be generated for the date range covered between the start and end dates entered. In the “Reports” column on the right side, check the box for any/all reports you want to be generated. Click on “Export”.

Export Reports

You can only export reports for under construction projects.

* Project
27-C027-079

* Start Date
10/01/2021

* End Date
05/23/2022

* Reports

- ☐ Select All
- ☐ Change Order Details
- ☒ Daily Report
- ☐ Daily Diary
- ☐ Detailed Payment
- ☐ Item History
- ☒ Item Quantity Summary
- ☐ Payment Invoice
- ☐ Payment Invoice By Fund (Fund Packages only)
- ☐ Payment Invoice with Fund Sources
- ☐ Time Charges
- ☒ Worksheet History

infotech

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[Terms](#) / [Privacy](#) / [DMCA](#)

The two specific exports that Local Systems staff will need for auditing/review purposes are “Daily Report” and “Item Quantity Summary”. Once extracted the “Daily Report” reports can all be merged into one PDF and placed in the Diaries drawer in Doc Express. The Item Quantity Summary reports should each be named according to the item and the naming convention and uploaded to Doc Express in the “Items and Materials” drawer as shown in the [Doc Express naming convention](#).

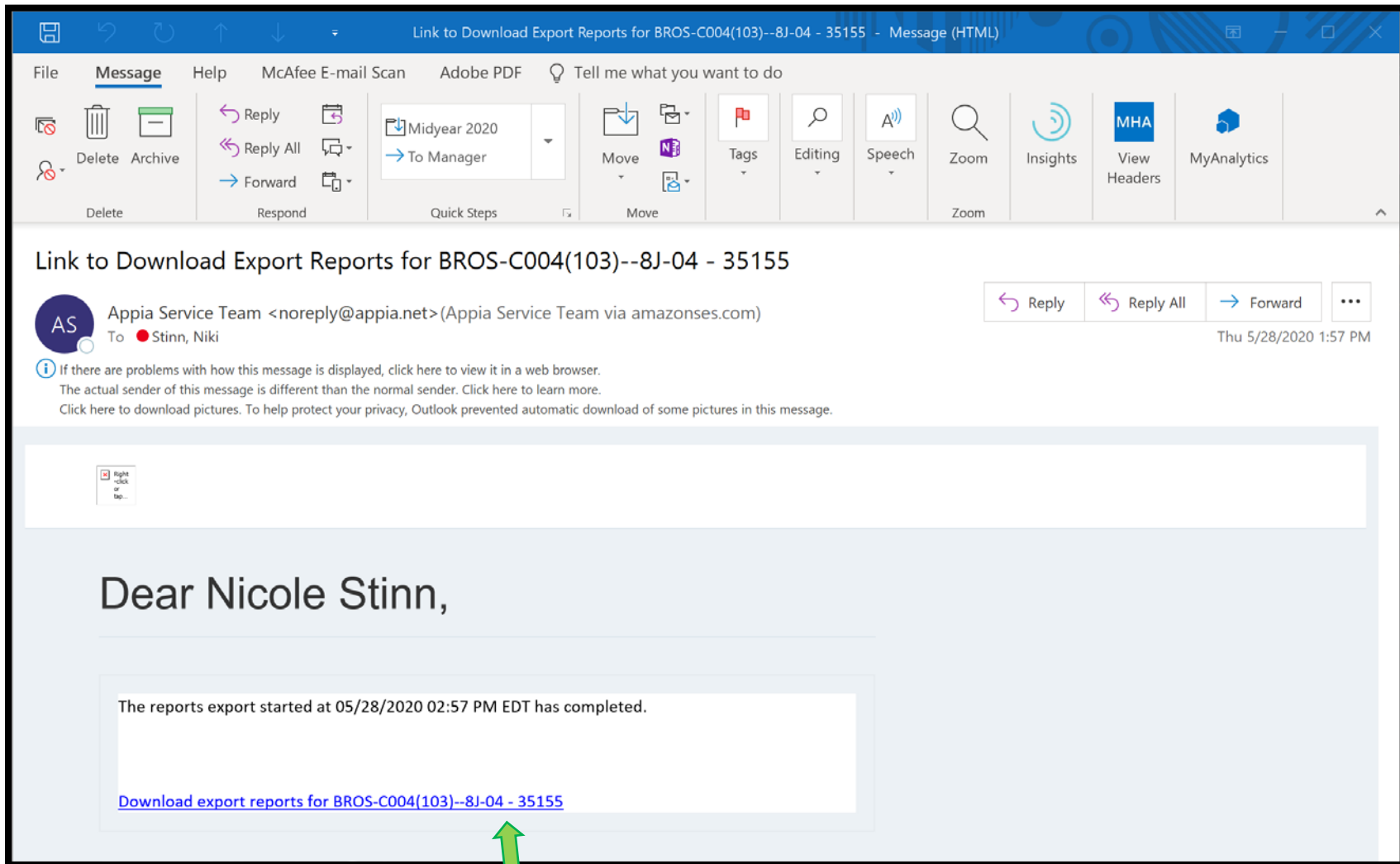
You will be brought back to the project listing screen where a green ribbon will be displayed across the top saying the export is in progress and that you will receive an email with a link to download the exported reports.

The screenshot shows the 'My Projects' interface. A green banner at the top contains the message: 'Export is in progress. You will receive an email with a link to download the export once it is done.' The left sidebar includes navigation options: MY PROJECTS, REFERENCE DATA, SYSTEM MGT, EXPORT DATA, and HELP. The main content area is titled 'My Projects' and features a search bar labeled 'Find Project'. Below the search bar, a 'Pro tip' box states: 'Click or tap the star to add a project to your favorite projects. My Projects will default to Favorites at next login if a favorite is selected.' The projects are listed under the 'Under Construction' status. The table below shows the project details:

	Description	
★	03-C003-062	+
★	STP-S-C011(71)--5E-11 - 29427	+
★	36-C035-074 JSON TEST/FINANCE Imported	+
★	BHM-SWAP-1827(684)--SA-82-1 12345	+
★	BROS-C004(103)--8J-04 - 35155	+
★	BROS-C078(111)--FF-78_Payment for Multiple Sections	+
★	BROS-C086(60)--8J-86 - 31961	+

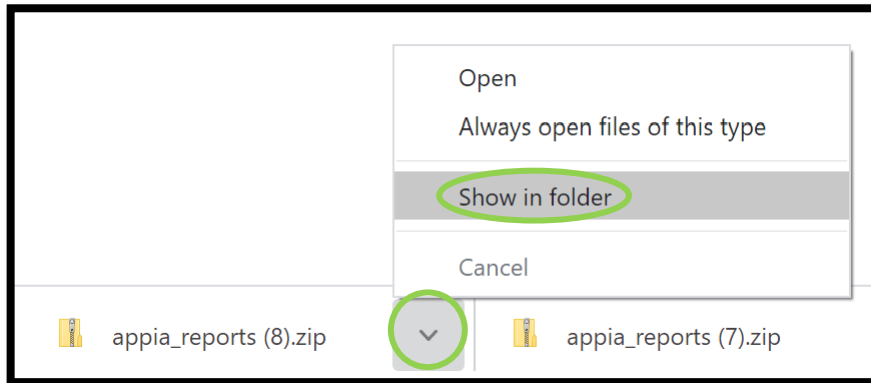
Additional UI elements include a 'Pro tip' box on the right: 'Projects statuses are located here. Click or tap to select a different status than the one showing.' and buttons for 'Create Project' and 'Import Project'. The status filter is set to 'Under Construction' and the view is 'Advanced'.

The email will look like this.

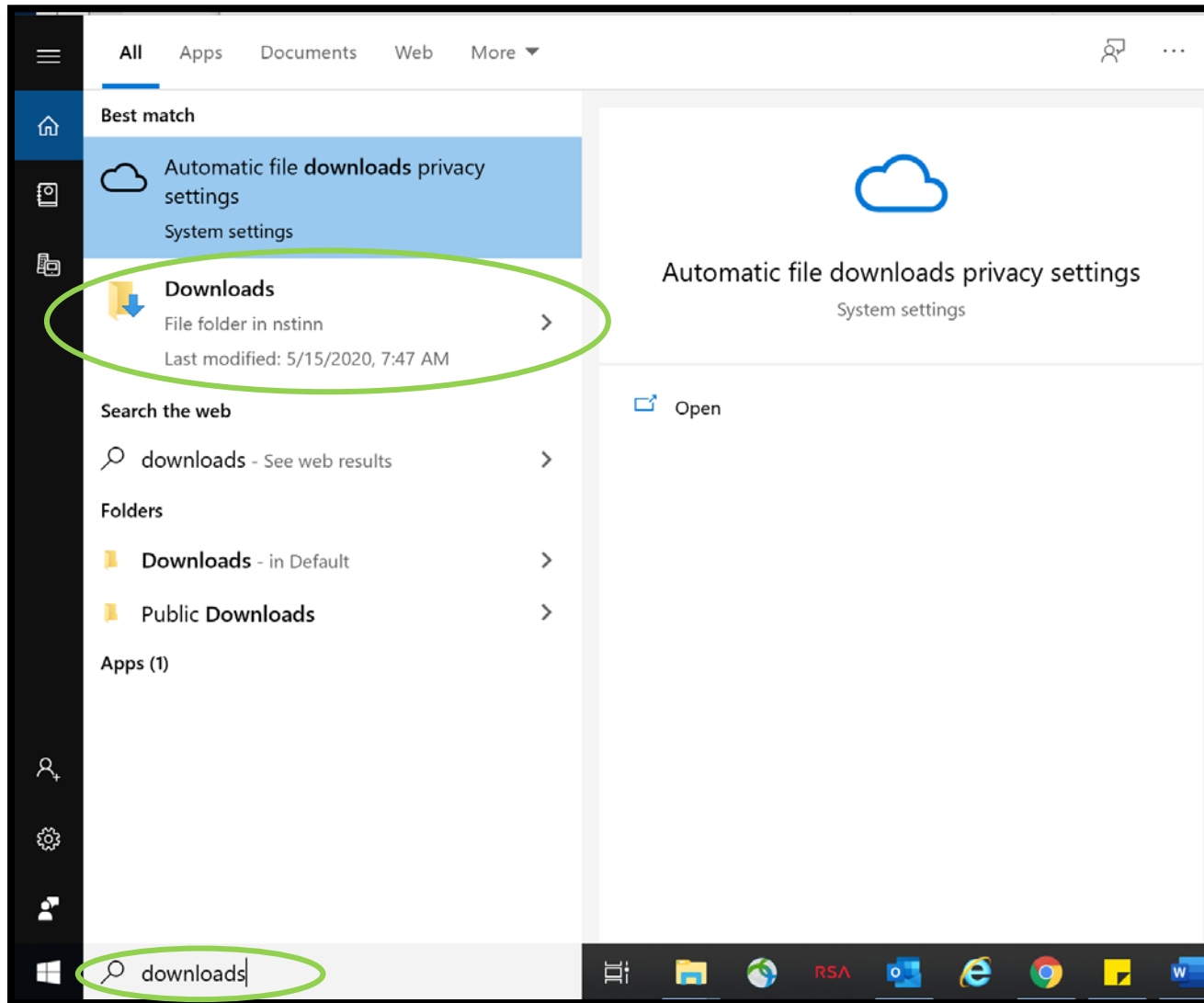


Click on the link here to download the project data.

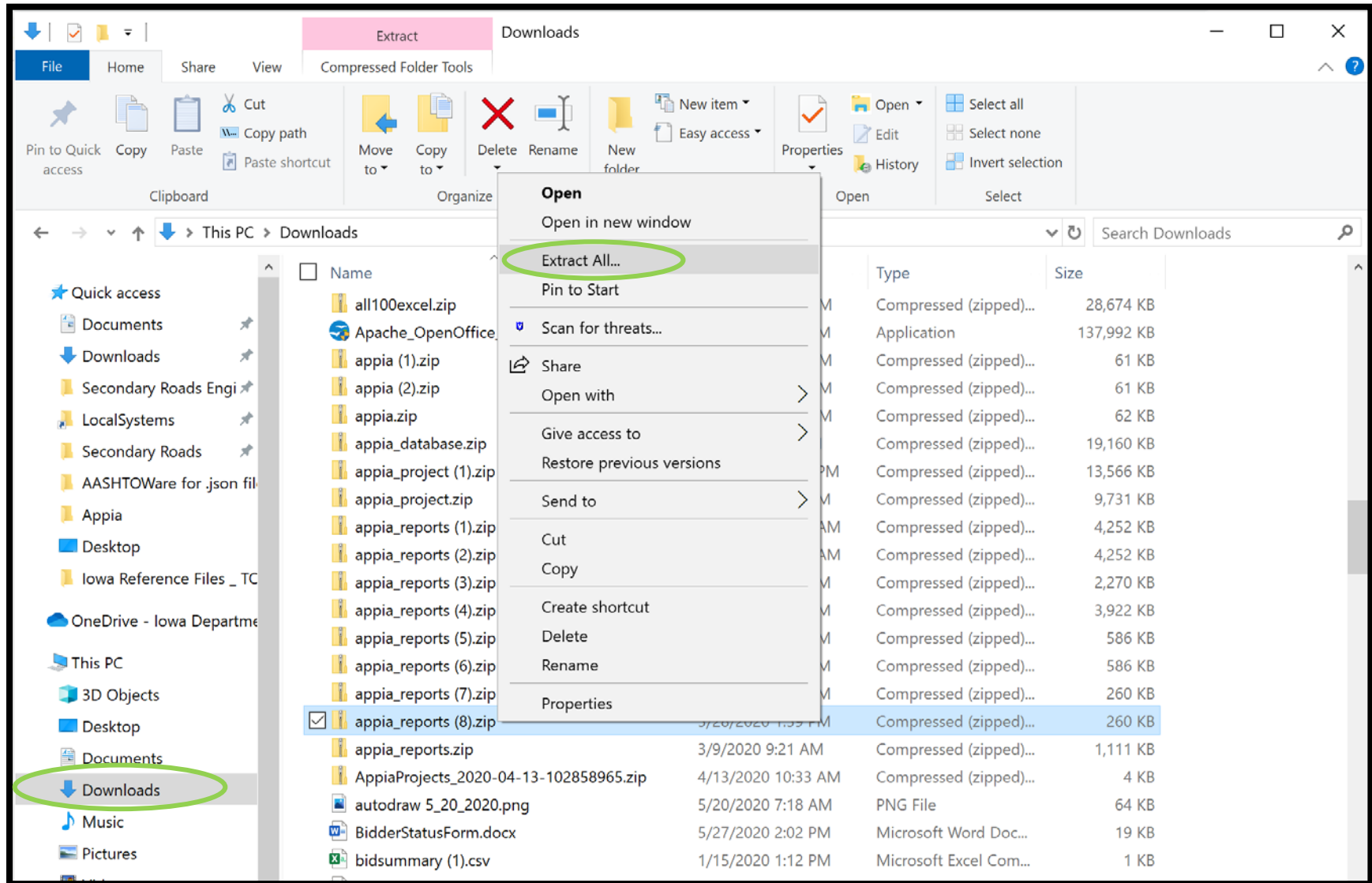
Depending on your browser, your file download may show up at the bottom like this. Click on the arrow to the right of the file name and then “Show in folder” to view the files.



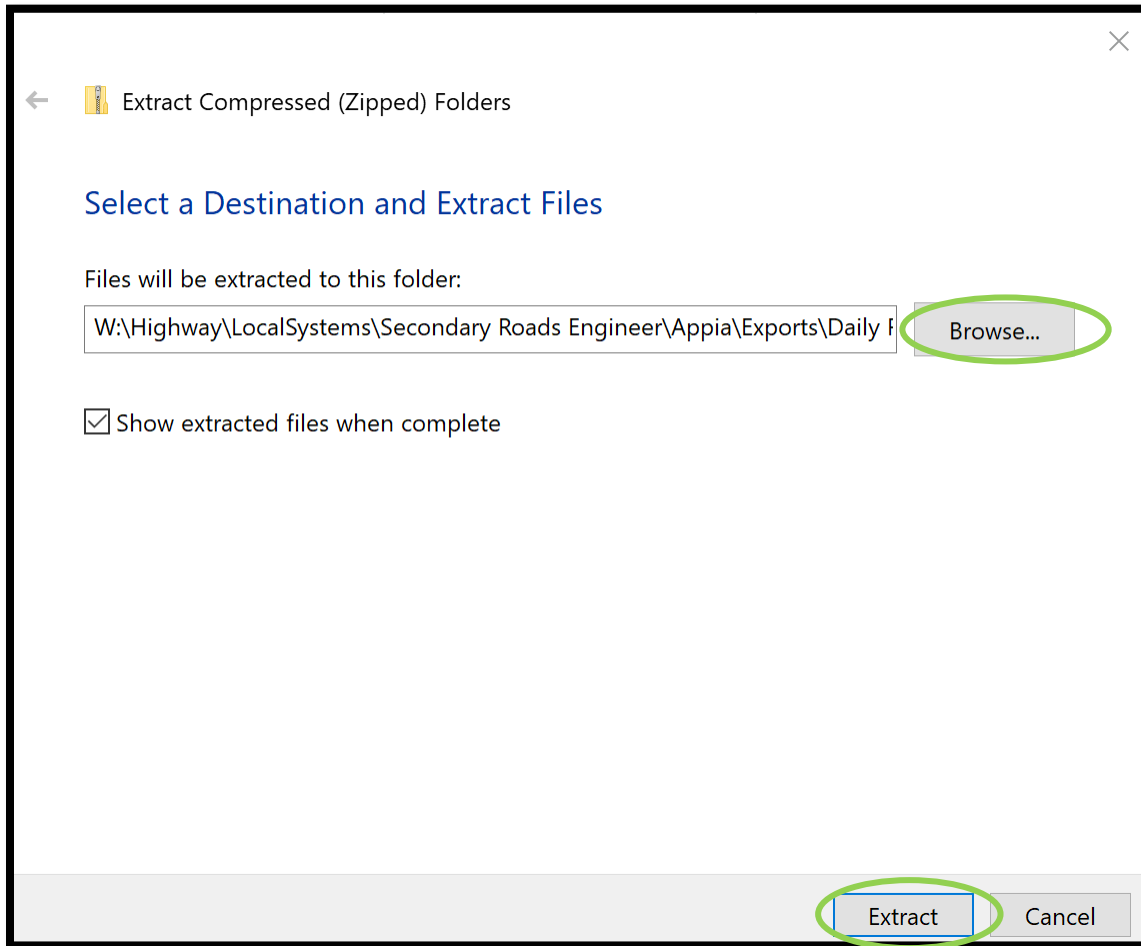
Alternately, once you have clicked on the link in the email, your zipped file can be found in the “Downloads” folder in your file explorer. The “Downloads” folder can be found by typing “downloads” in your search bar.



Whichever path is taken to download the file, you should arrive here. Right click on your file and select “Extract All...”.



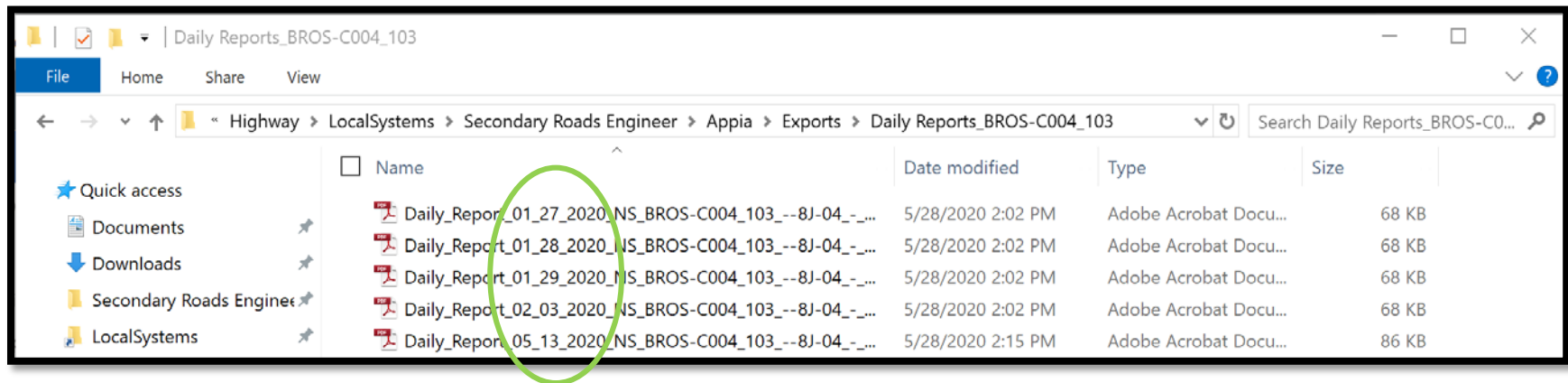
This window will pop up. Browse to find the location where you would like to save your project data.



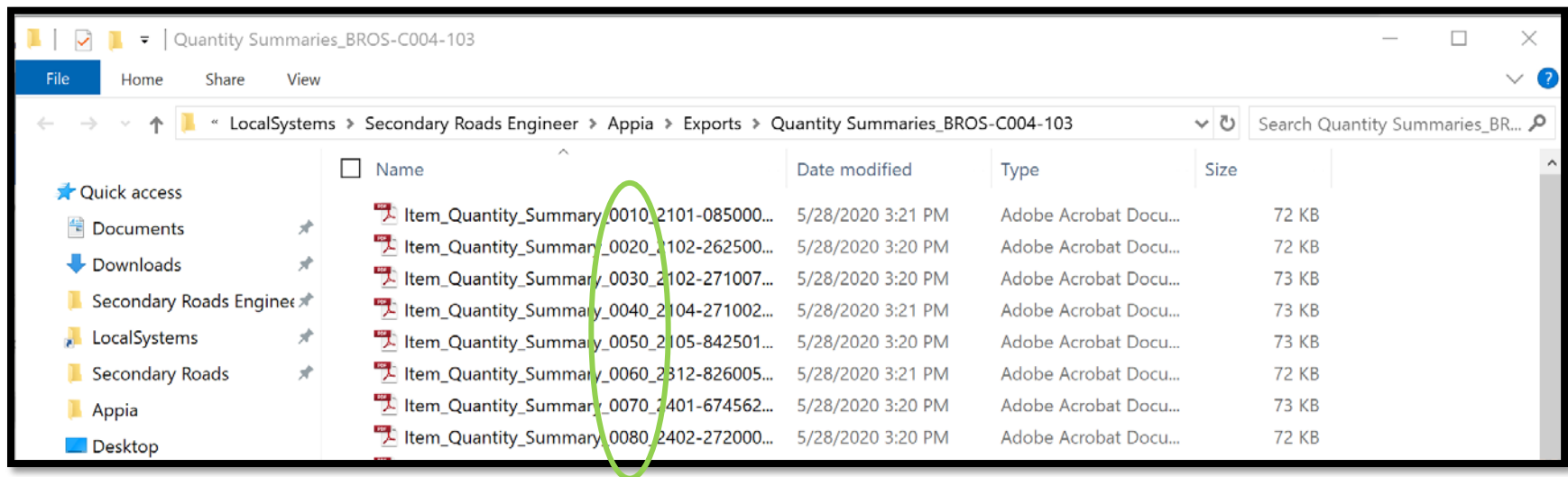
When you have selected the appropriate file in which to save your data, click "Extract".

A new file explorer window will open showing the folder with the extracted files.

Here is a sample of the export containing the Daily Report files. Note the dates in the file names.



Here is a sample of the export containing the Item Quantity Summary files. Note the Item numbers in the file names.



A sample "Daily Report" report is shown here.



Appanoose County Secondary Roads
Daily Report
BROS-C004(103)--8J-04 - 35155

Description
Report Date
Prime Contractor
Status
Weather
Temperature
Created By
Approved By
Remarks

On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.
05/13/2020
CUNNINGHAM-REIS, LLC:
35647 RICHLAND ROAD
VAN METER, IA
Approved

Nicole Stinn on 05/28/2020 03:09 PM EDT
Nicole Stinn on 05/28/2020 03:14 PM EDT
The contractor was on site today performing Class 10 Roadway and Borrow Excavation on the northwest corner of the bridge. They also removed the east abutment.

Personnel

Crew #1 – CUNNINGHAM-REIS, LLC

Worker Type #1 (3)

10.00 hours

Worker Type #2 (1)

10.00 hours

1 crew

Equipment

Description	Active	Idle	Comments	Contractor
CUNNINGHAM-REIS, LLC				

1 equipment

Daily Report:
BROS-C004(103)--8J-04 - 35155


05/28/2020
Page 1 of 2

Item Postings					
Line Number	Item ID	Unit	Unit Price	Quantity Placed	Posted Amount
Section: 0001 - ITEMS FOR A 100'-0 X 24'-6 CONTINUOUS CONCRETE SLAB BRIDGE					
0030	2102-2710070	CY	\$5,000	555.556	\$2,777.78
EXCAVATION, CL 10, RDWY+BORROW					
Contractor: CUNNINGHAM-REIS, LLC					
Funding Details					
Default Fund Package				555.556	\$2,777.78
0070	2401-6745625	LS	\$10,000.000	0.250	\$2,500.00
RMVL OF EXISTING BRIDGE					
Contractor: CUNNINGHAM-REIS, LLC					
Funding Details					
Default Fund Package				0.250	\$2,500.00
2 item postings				Total Posted Amount: \$5,277.78	

Daily Report:
BROS-C004(103)--8J-04 - 35155

05/28/2020
Page 2 of 2

A sample “Item Quantity Summary” report is shown here. Note the remarks and location information shown. This is the most similar report in Appia to the standard DOT .xlsx “E” sheets widely used for recording quantities.



Appanoose County Secondary Roads
Item Quantity Summary
BROS-C004(103)--8J-04 - 35155

Project Description
On 437th Street Over Trib to Soap Cr. From 314th Ave. West 0.3 Miles on N Line S22 T70 R16.

Line Number
0030

Item
2102-2710070

Description
EXCAVATION, CL 10, RDWY+BORROW

Unit
CY
Unit Price
\$5.00

Original Quantity
1,600.000
Quantity Paid
0.000

Authorized Quantity
1,600.000
Quantity Placed but not Paid
1,444.445

Total Quantity Placed
1,444.445
Amount Paid
\$0.00

Quantity Remaining
155.555
Amount Unpaid
\$7,222.23

Pending Quantity
0.000
Authorized Amount
\$8,000.00

Postings

Daily Report Date	Created By	Status	Quantity Placed	Total Placed	Quantity Remaining
05/13/2020	Nicole Stimm	Approved	555.556	1,444.445	155.555
05/12/2020	Nicole Stimm	Approved	888.889	888.889	711.111
Station: From 100 + 0.00 To 100 + 80.00 Location: 13' RT to 93' RT Remarks: Southwest corner of bridge. Irregular area.					
2 postings					

Item Quantity Summary:
BROS-C004(103)--8J-04 - 35155

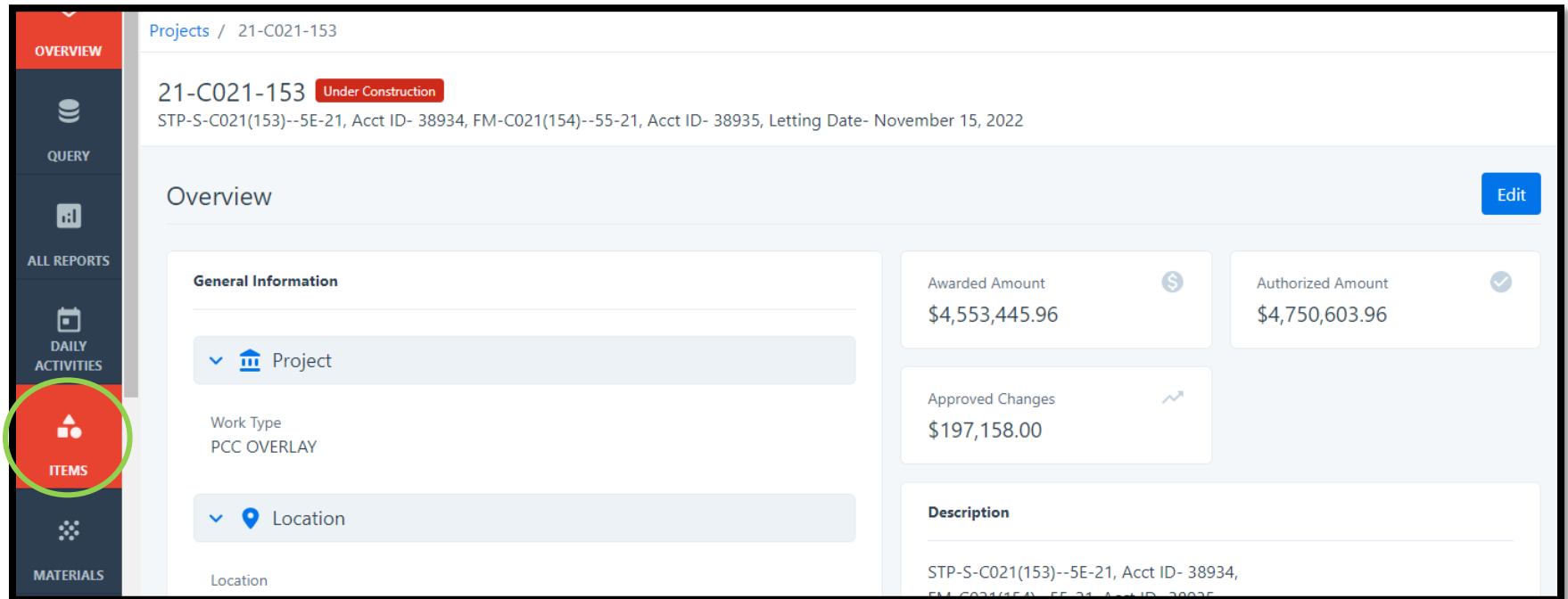
05/28/2020
Page 1 of 1

19 - EZ Forms Exports

A. EZ Forms (E-Sheets)

The EZ Forms workbook is an automated workbook that assembles all the E-Sheets for a contract. It provides integrated tracking capabilities for item certifications and testing requirements and includes links to specification sections and other useful references. The EZ Forms workbook is not yet available online. However, a copy can be requested from the LPA's [Local Systems Regional Field Technician](#).

You can export an Items report from Appia that can be loaded into the EZ Forms workbook. To generate the Items report for the EZ Forms Workbook, click on Items in the left menu.



OVERVIEW

QUERY

ALL REPORTS

DAILY ACTIVITIES

ITEMS

MATERIALS

Projects / 21-C021-153 / Items

21-C021-153

Under Construction

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

Reports

Items

Add Section

Actions

Complete

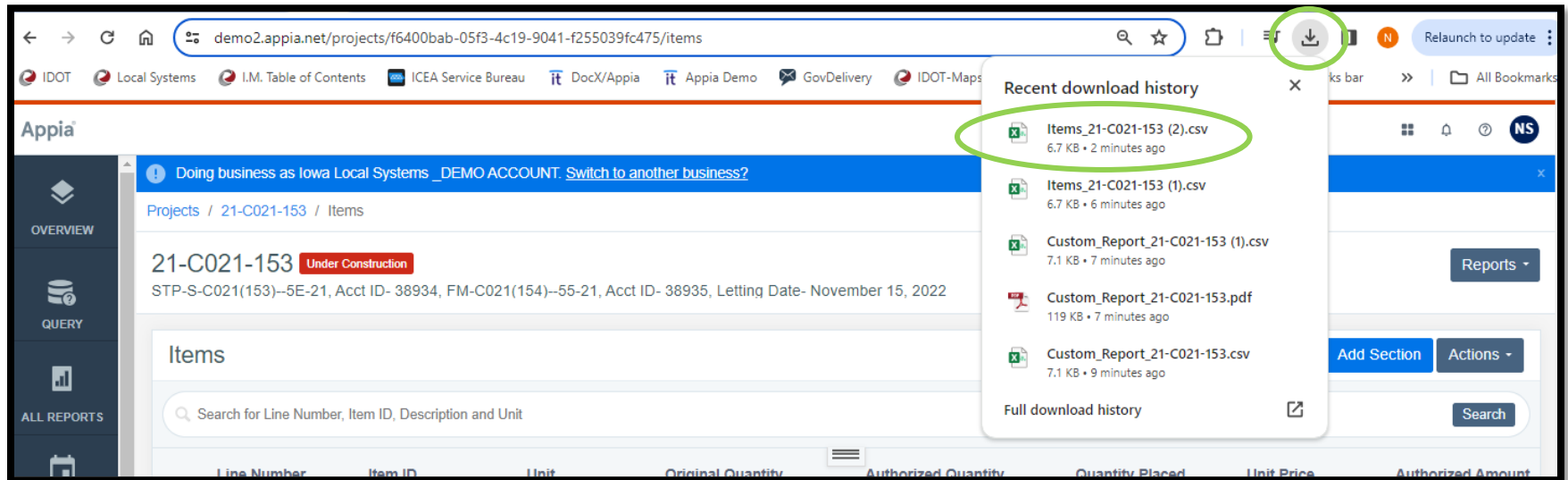
Export CSV

Export Automap

Search for Line Number, Item ID, Description and Unit

Line Number	Item ID	Unit	Original Quantity	Authorized Quantity	Quantity Placed	Unit Price	Authorized Amount
Section: 0001 - STP-S-C021(153)--5E-21, Acct ID- 38934, ROADWAY ITEMS							Add Unattached
0010	2110-3825010	TON	760.000	760.000	0.000	\$7.900	\$6,004.00
GRANULAR MATERIAL							
Quantity Placed				Quantity Paid			
0.0%				0.0%			
0020	2121-7425020	TON	9,550.000	9,550.000	0.000	\$32.760	\$312,858.00
GRANULAR SHOULDERS, TYPE B							
Quantity Placed				Quantity Paid			

A .csv file will download in your browser. This is an example of where the download can be accessed from the Google Chrome browser. Other browsers will be different.



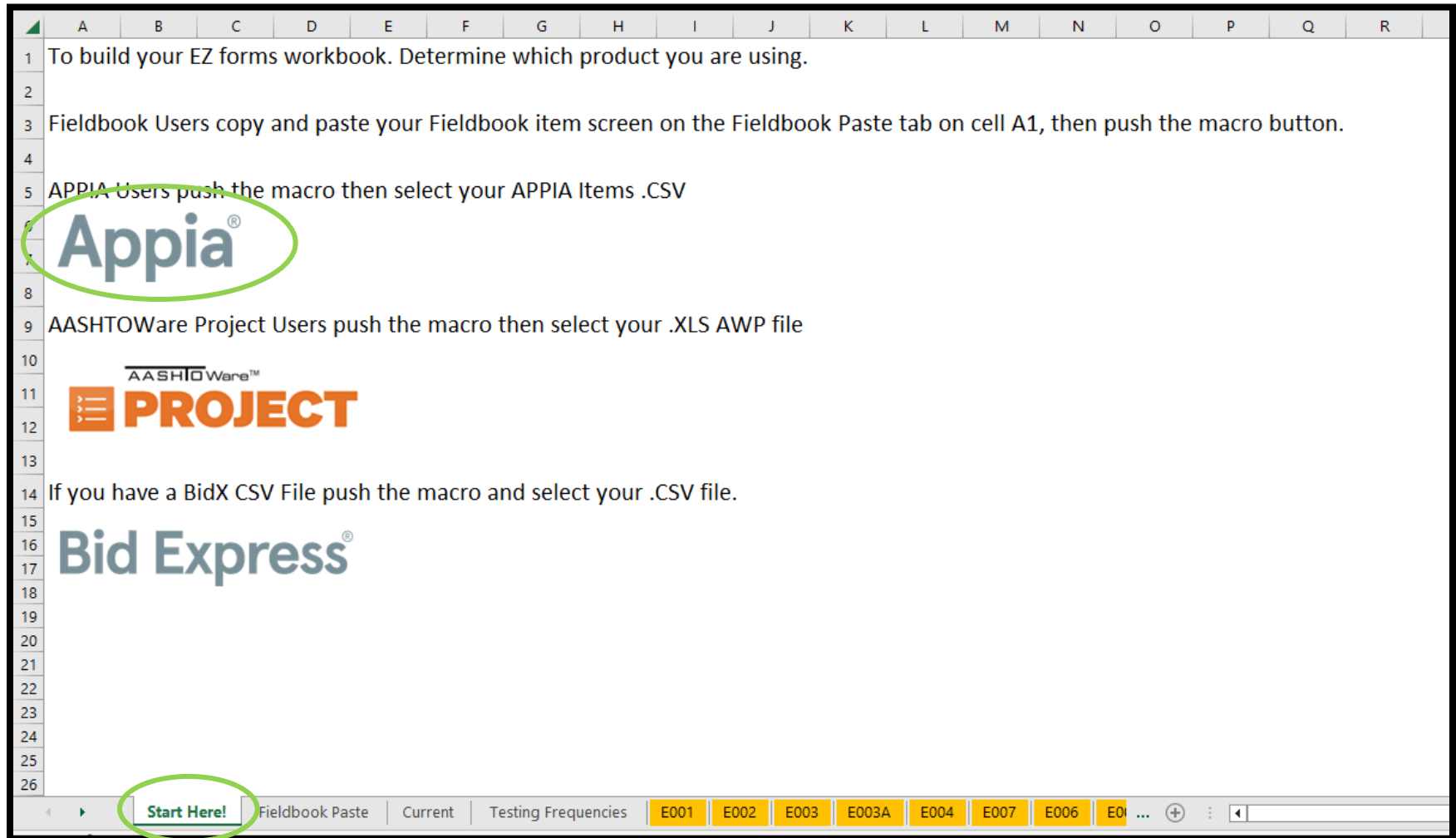
The downloaded file will look like the following. It should have no header information except the column labels and should contain these exact columns in this exact order.

- Section Number
- Section Description
- Line Number
- Item ID
- Description
- Supplemental Description
- Unit
- Original Qty
- Authorized Qty
- Qty Placed
- Unit Price
- Authorized Amount

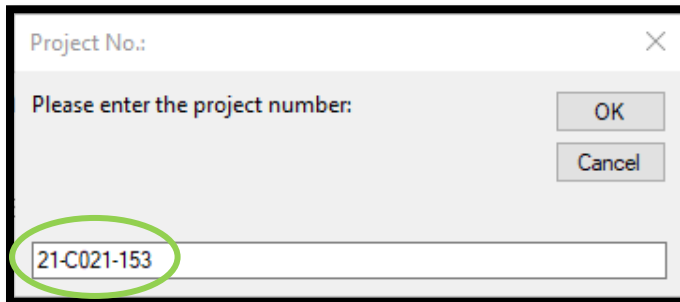
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Section N	Section D	Line Num	Item ID	Descriptio	Suppleme	Unit	Original Q	Authorize	Qty Place	Unit Price	Authorized Amo	
2	1	STP-S-C02	10	2110-3825	GRANULAR MATERIA	TON		760	760	0	7.9	6004	
3	1	STP-S-C02	20	2121-7425	GRANULAR SHOULDE	TON		9550	9550	0	32.76	312858	
4	1	STP-S-C02	30	2214-5145	PAVEMENT SCARIFIC	SY		74947	74827	0	1.35	101016.5	
5	1	STP-S-C02	40	2301-0690	BRIDGE APPROACH,	SY		97.8	97.8	0	200	19560	
6	1	STP-S-C02	50	2301-1032	STANDARD OR SLIP F	SY		2813	2813	210	68.15	191706	
7	1	STP-S-C02	60	2301-9091	RUMBLE STRIP PANE	EACH		6	9	0	25	225	
8	1	STP-S-C02	70	2310-5151	PORTLAND CEMENT	CY		12491	12491	20	112.95	1410858	
9	1	STP-S-C02	80	2310-5151	PORTLAND CEMENT	SY		74947	74947	0	4.5	337261.5	
10	1	STP-S-C02	90	2315-8275	SURFACING, DRIVEW	TON		1140	1140	0	35.05	39957	
11	1	STP-S-C02	100	2316-0000	PAYMENT ADJUSTME	EACH		58320	58320	0	1	58320	
12	1	STP-S-C02	110	2505-4008	REMOVAL OF STEEL B	LF		260	260	0	15	3900	
13	1	STP-S-C02	120	2505-4008	STEEL BEAM GUARDF	EACH		4	4	0	2000	8000	
14	1	STP-S-C02	130	2505-4021	STEEL BEAM GUARDF	EACH		4	4	0	300	1200	
15	1	STP-S-C02	140	2505-4021	STEEL BEAM GUARDF	EACH		4	4	0	3418.5	13674	
16	1	STP-S-C02	150	2510-6745	REMOVAL OF PAVEM	SY		2813	2813	0	3.26	9170.38	
17	1	STP-S-C02	160	2526-8285	CONSTRUCTION SUR	LS		1	1	0	55000	55000	
18	1	STP-S-C02	170	2527-9263	PAINTED PAVEMENT	STA		851.07	851.07	0	17	14468.19	
19	1	STP-S-C02	180	2528-2518	SAFETY CLOSURE	EACH		16	16	0	125	2000	
20	1	STP-S-C02	190	2528-8445	TRAFFIC CONTROL	LS		1	1	0	28525	28525	
21	1	STP-S-C02	200	2533-4980	MOBILIZATION	LS		1	1	0	150390	150390	
22	1	STP-S-C02	210	2555-0000	DELIVER AND STOCK	LS		1	1	0	5475	5475	
23	1	STP-S-C02	8001	2217-1000	RUBBLIZED PAV'T	SY		0	160	10	30	4800	
24	1	STP-S-C02	8002	2301-0690	BRIDGE APPROACH,	SY		0	100	0	220	22000	
25	1	STP-S-C02	8010	2107-3825	GRANULAR MATERIA	CY		0	0	0	0	0	
26	2	FM-C021(	220	2110-3825	GRANULAR MATERIA	TON		319	319	0	7.9	2520.1	
27	2	FM-C021(	230	2121-7425	GRANULAR SHOULDE	TON		6330	6330	0	32.76	207370.8	
28	2	FM-C021(	240	2214-5145	PAVEMENT SCARIFIC	SY		50893	50893	0	1.35	68705.55	
29	2	FM-C021(	250	2301-1032	STANDARD OR SLIP F	SY		1097	1397	10	68.15	95205.55	
30	2	FM-C021(	260	2301-9091	RUMBLE STRIP PANE	EACH		4	4	0	25	100	
31	2	FM-C021(	270	2310-5151	PORTLAND CEMENT	CY		8482	8482	50	112.95	958041.9	
32	2	FM-C021(	280	2310-5151	PORTLAND CEMENT	SY		50893	50893	0	4.5	229018.5	

Save the downloaded file to the desired location on your computer or server. Do NOT change the .csv file extension.

Open the EZ Forms Workbook. On the “Start Here!” tab, there is an “Appia” button. Push this button to begin uploading your saved Appia file to the EZ Forms Workbook.



Clicking on the “Appia” button will cause a pop-up box to appear saying, “Please enter the project number:”. Because the workbook will contain items from all tied projects in a contract, enter the Contract ID for your contract. (This is the name of the project in Appia.) Then click “Ok”.

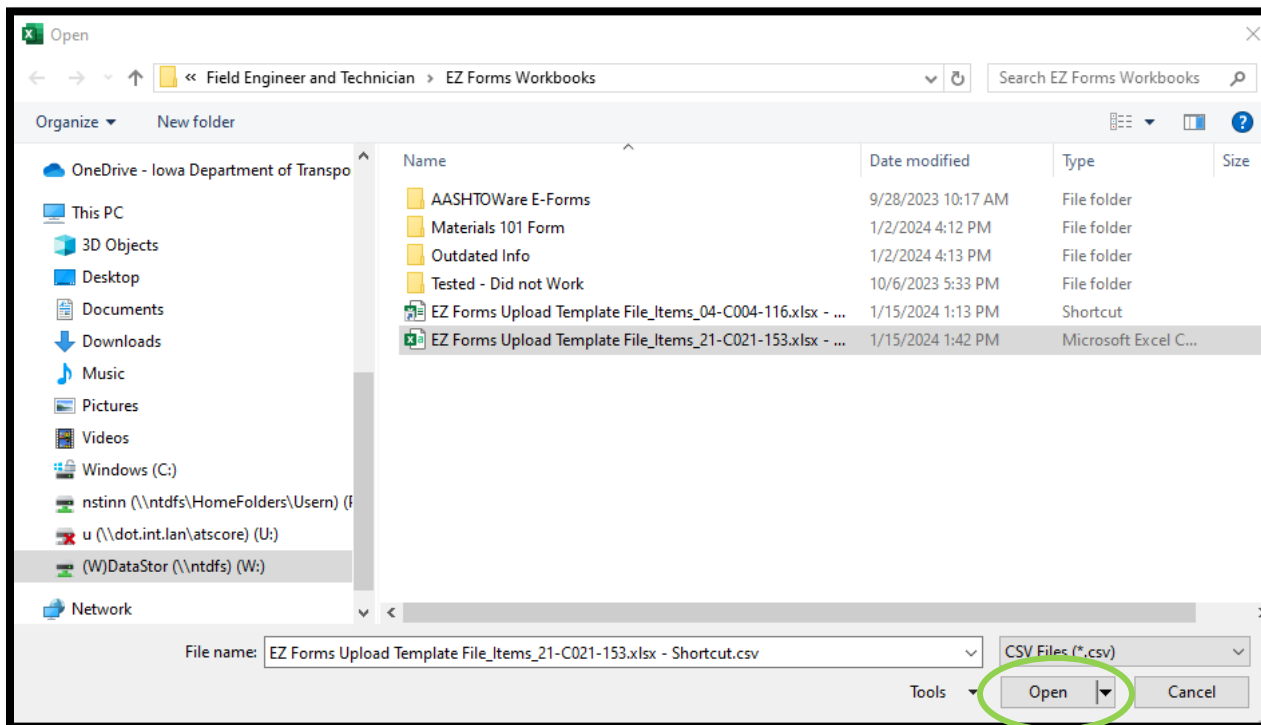


Project No. [X]

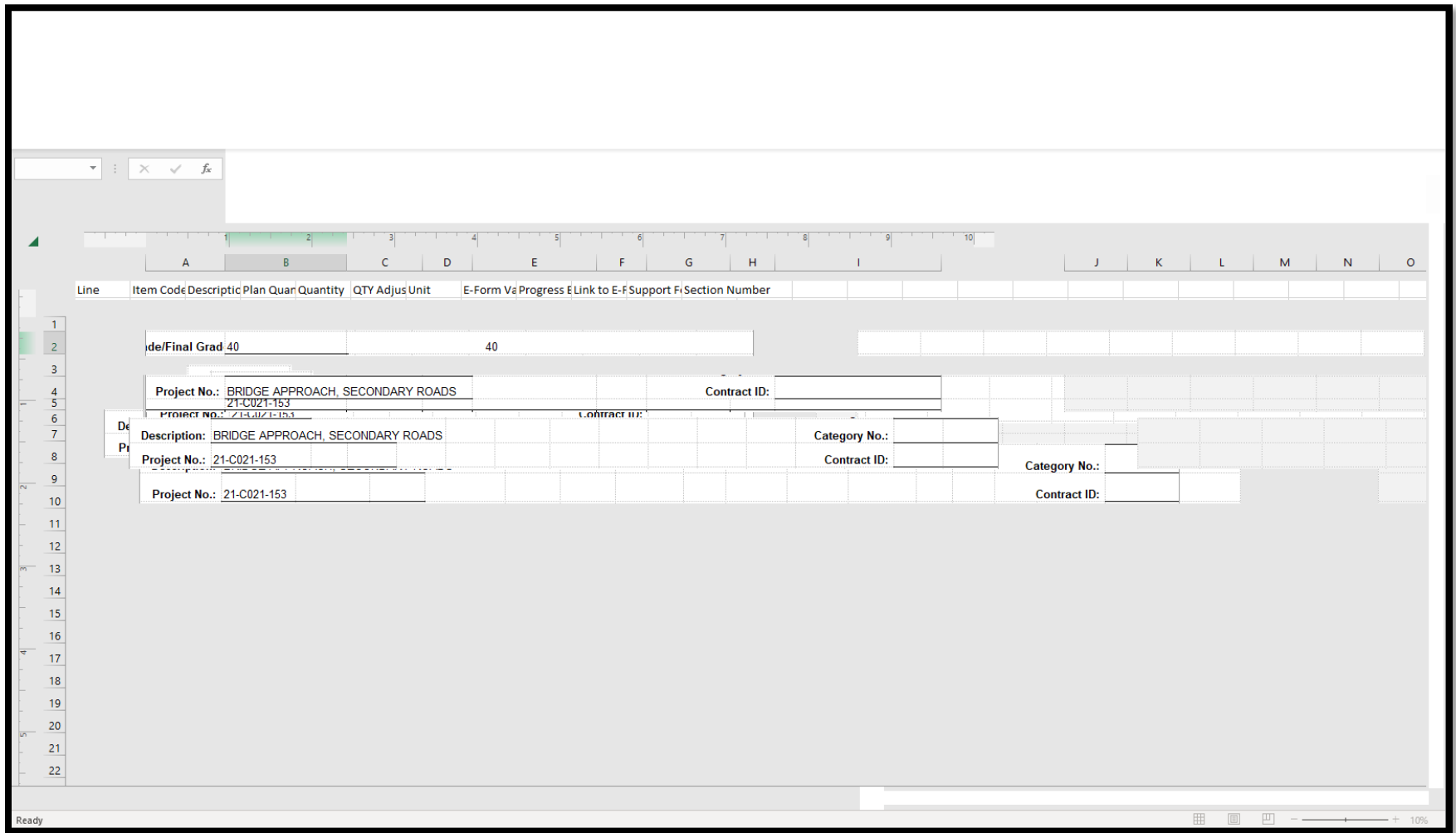
Please enter the project number: [OK] [Cancel]

21-C021-153

A Windows Explorer box will open. Navigate to the location where you saved the downloaded Appia file. Select the file, and then click “Open”.



The EZ Forms Workbook builder will start to run. You may see some blinking cells and partial screens while the macros run and create the workbook. This is OK and normal.



When the macros are done running and the workbook has been assembled, the screen will stop changing, and you will be brought to the Table of Contents page where all the items are listed.

Line	Item Code	Description	Plan Quant	Quant	QTY Adjustm	Unit	E-Form Val	Progress	E Link to E-Form	Support Forms
10	2110-3825010	GRANULAR MATERIAL		760		TON	0	0.00%	Link to Line 10 - E001	Line 10 - E110
20	2121-7425020	GRANULAR SHOULDERS, TYPE B		9550		TON	0	0.00%	Link to Line 20 - E007	
30	2214-5145150	PAVEMENT SCARIFICATION	Y	74827		SY	0	0.00%	Link to Line 30 - E003	
40	2301-0690220	BRIDGE APPROACH, SECONDARY ROADS	Y	97.8		SY	0	0.00%	Link to Line 40 - E023	Line 40 - E109, Line 40 - E110, Line 40 - E115
50	2301-1032090	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT	Y	2813		SY	0	0.00%	Link to Line 50 - E023	Line 50 - E109, Line 50 - E110, Line 50 - E115
60	2301-9091000	RUMBLE STRIP PANEL (PCC SURFACE)		9		EACH	0	0.00%	Link to Line 60 - E039	
70	2310-5151040	PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY		12491		CY	0	0.00%	Link to Line 70 - E001	Line 70 - E115
80	2310-5151045	PORTLAND CEMENT CONCRETE OVERLAY, PLACEMENT ONLY	Y	74947		SY	0	0.00%	Link to Line 80 - E003	Line 80 - E109
90	2315-8275055	SURFACING, DRIVEWAY		1140		TON	0	0.00%	Link to Line 90 - E001	
100	2316-0000110	PAYMENT ADJUSTMENT INCENTIVE/DISINCENTIVE FOR PCC PAVEMENT SMOOTHING		58320		EACH	0	0.00%	Link to Line 100 - E001	
110	2505-4008120	REMOVAL OF STEEL BEAM GUARDRAIL		260		LF	0	0.00%	Link to Line 110 - E039	
120	2505-4008410	STEEL BEAM GUARDRAIL BARRIER TRANSITION SECTION, BA-201		4		EACH	0	0.00%	Link to Line 120 - E039	
130	2505-4021010	STEEL BEAM GUARDRAIL END ANCHOR, BOLTED		4		EACH	0	0.00%	Link to Line 130 - E039	
140	2505-4021720	STEEL BEAM GUARDRAIL TANGENT END TERMINAL, BA-205		4		EACH	0	0.00%	Link to Line 140 - E039	
150	2510-6745850	REMOVAL OF PAVEMENT		2813		SY	0	0.00%	Link to Line 150 - E003	
160	2526-8285000	CONSTRUCTION SURVEY	Y	1		LS	0.00	0.00%	Link to Line 160 - E005	
170	2527-9263109	PAINTED PAVEMENT MARKING, WATERBORNE OR SOLVENT-BASED		851.07		STA	0	0.00%	Link to Line 170 - E026	
180	2528-2518000	SAFETY CLOSURE		16		EACH	0	0.00%	Link to Line 180 - E039	
190	2528-8445110	TRAFFIC CONTROL	Y	1		LS	0.00	0.00%	Link to Line 190 - E005	Line 190 - E126
200	2533-4980005	MOBILIZATION	Y	1		LS	\$0.00	0.00%	Link to Line 200 - E030	
210	2555-0000010	DELIVER AND STOCKPILE SALVAGED MATERIALS	Y	1		LS	0.00	0.00%	Link to Line 210 - E005	
8001	2217-1000000	RUBBLIZED PAV'T	Y	160		SY	0	0.00%	Link to Line 8001 - E003	
8010	2107-3825025	GRANULAR MATERIAL FOR BLANKET AND SUBDRAIN		0		CY	0	#DIV/0!	Link to Line 8010 - E004	
220	2110-3825010	GRANULAR MATERIAL		319		TON	0	0.00%	Link to Line 220 - E001	Line 220 - E110
230	2121-7425020	GRANULAR SHOULDERS, TYPE B		6330		TON	0	0.00%	Link to Line 230 - E007	
240	2214-5145150	PAVEMENT SCARIFICATION	Y	50893		SY	0	0.00%	Link to Line 240 - E003	
250	2301-1032090	STANDARD OR SLIP FORM PORTLAND CEMENT CONCRETE PAVEMENT	Y	1397		SY	0	0.00%	Link to Line 250 - E023	Line 250 - E109, Line 250 - E110, Line 250 - E115
260	2301-9091000	RUMBLE STRIP PANEL (PCC SURFACE)		4		EACH	0	0.00%	Link to Line 260 - E039	
270	2310-5151040	PORTLAND CEMENT CONCRETE OVERLAY, FURNISH ONLY		8482		CY	0	0.00%	Link to Line 270 - E001	Line 270 - E115
280	2310-5151045	PORTLAND CEMENT CONCRETE OVERLAY, PLACEMENT ONLY	Y	50893		SY	0	0.00%	Link to Line 280 - E003	Line 280 - E109

The assembled EZ Forms workbook for your project automatically saves to the location where the Appia file was saved. It will have the name "Project [Project Number]" where [Project Number] is the contract ID you entered in a previous step.

You are now ready to use the EZ Forms workbook in place of the standard E-Sheets.

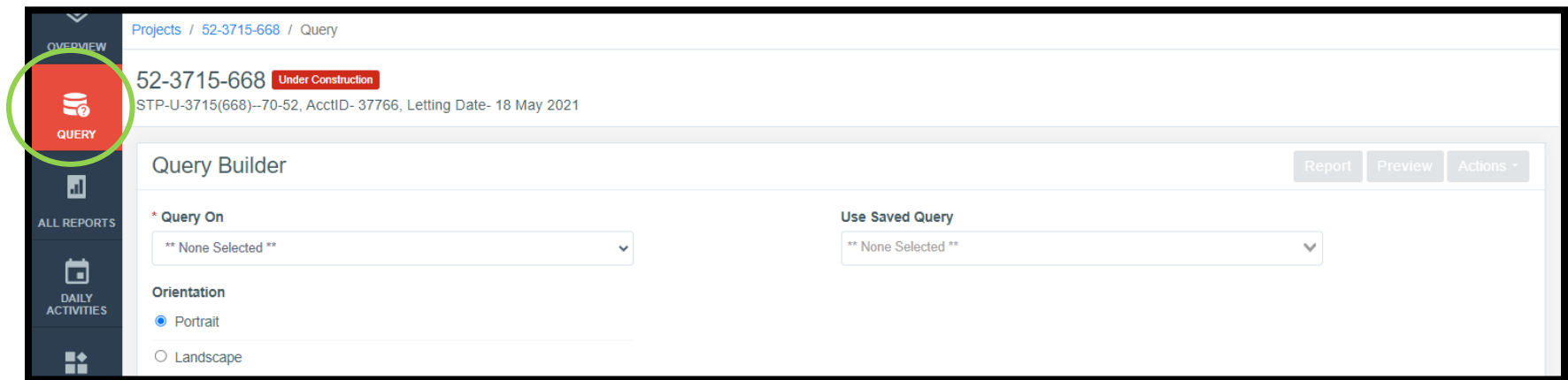
Contact your [Local Systems Regional Field Technician](#) with questions about the workbook.

B. Materials 101 EZ Form

The Materials 101 EZ Form is a semi-automated version of the Materials 101 form required for project audits. The Materials 101 EZ Form is not yet available online. However, a copy can be requested from the LPA's [Local Systems Regional Field Technician](#).

You can export a queried report from Appia that can be loaded into the Materials101 EZ Form. When loaded into the Materials101 EZ Form, the item description, units, and quantity paid will all populate automatically once the user enters the bid item's line number in the "Contract Item No" line in on the sheets.

To generate the report for the Materials101 EZ Form, click on Query on the left menu.



When building the report for the first time, in the "Query On" pull-down menu, select "Project Items". Leave the "Orientation" set to Portrait. (Once this report is built, you will be instructed on how to save it, and the report can be selected from the "Use Saved Query" pull-down menu in the future.)

Projects / 52-3715-668 / Query

52-3715-668 Under Construction

STP-U-3715(668)--70-52, AcctID- 37766, Letting Date- 18 May 2021

Query Builder Report Preview Actions

* Query On

** None Selected **

** None Selected **

Project Items

Payment Items

Orientation

☐ Landscape

Use Saved Query

** None Selected **

Query Builder Report Preview Actions

* Query On

Project Items

Orientation

Portrait

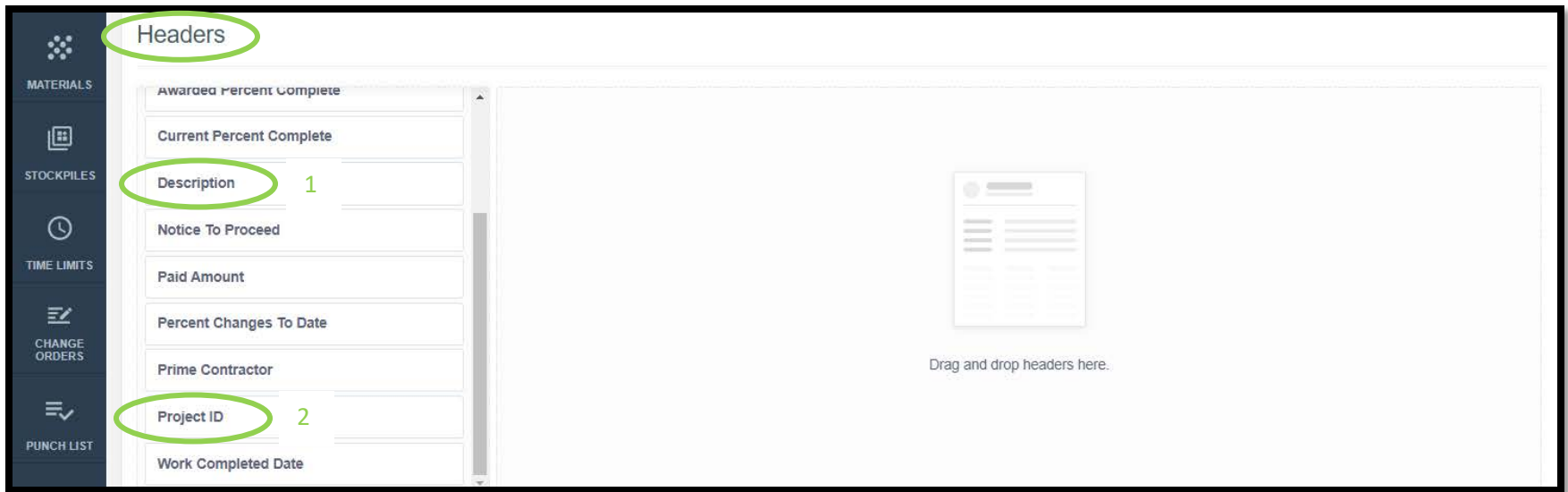
☐ Landscape

Use Saved Query

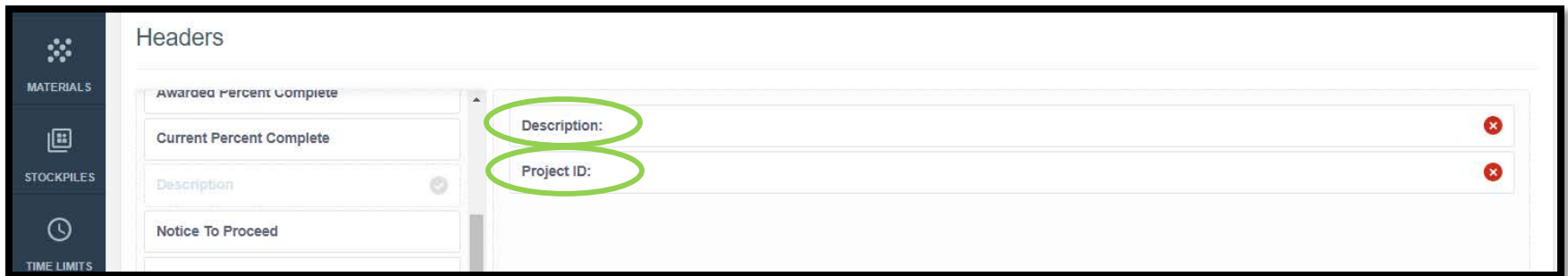
** None Selected **

Once “Project Items” is selected from the “Query On” pull-down menu, two sections will appear on the lower part of the screen. These sections are “Headers” and “Body”.

From the “Headers” section, in the order listed here, select “Description” and “Project ID”. Do NOT select any additional Header options. If you do, the Materials101 EZ Form will not read the file correctly.



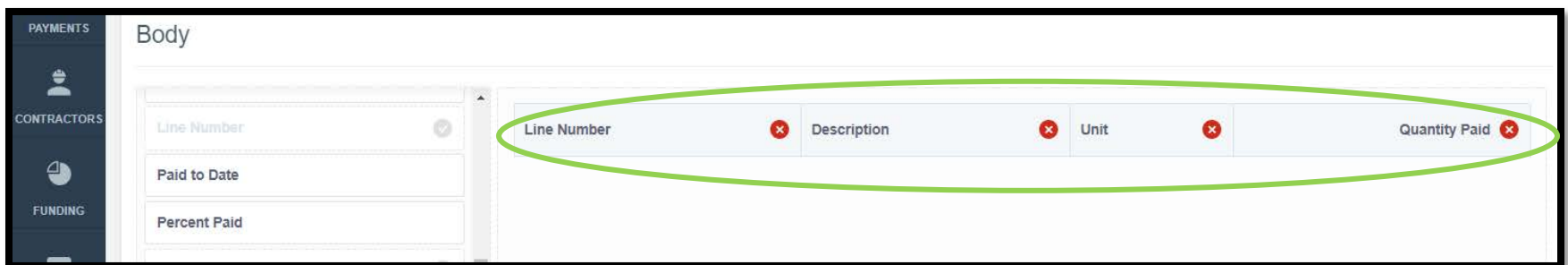
Each of the selections will then appear in the box to the right of the Header selection choices.



From the “Body” section, in the order listed here, select “Line Number”, “Description”, “Unit” and “Quantity Paid”.

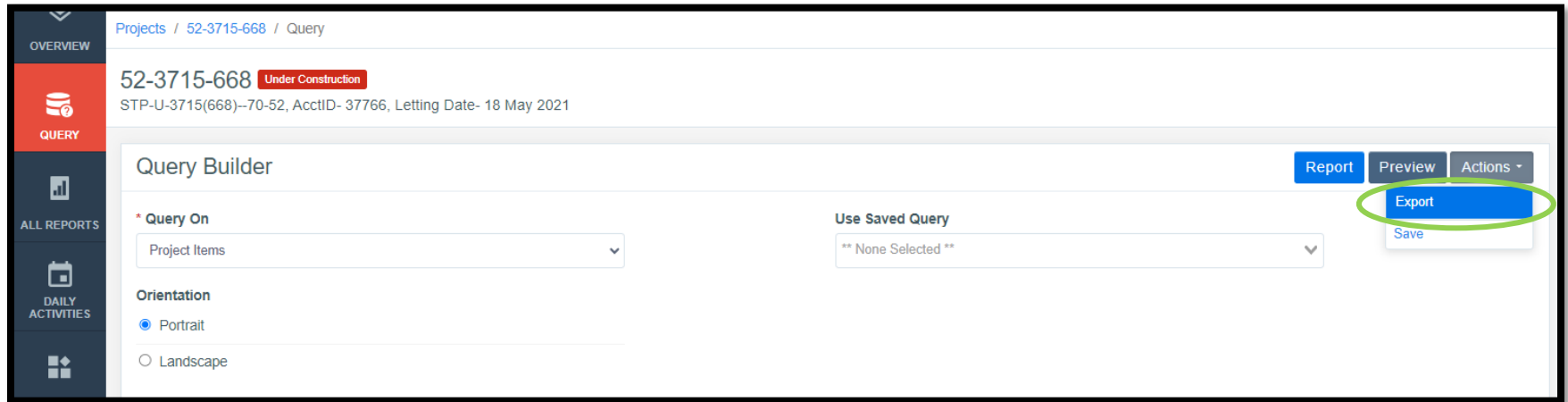


Each of the selections will then appear in the box to the right of the Body selection choices.

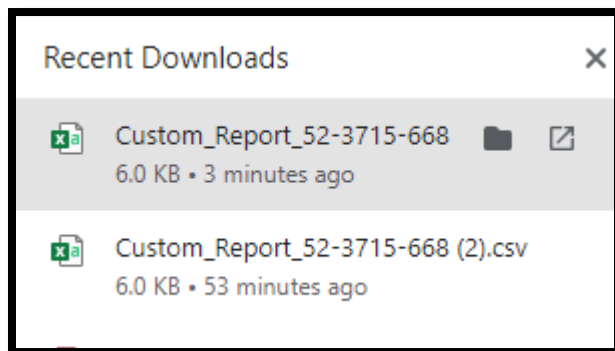


Note: The user can drag and drop the choices in the right windows to re-order them if necessary.

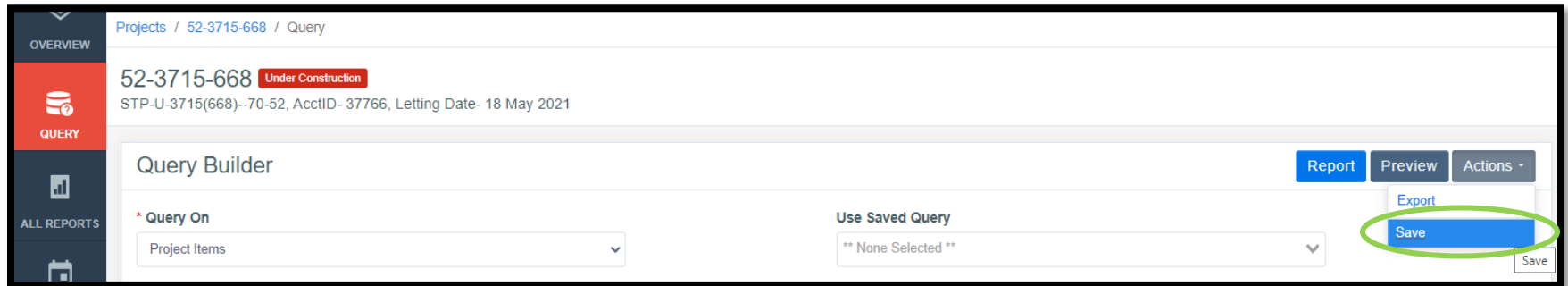
When the selections have been made, in the “Actions” pull-down in the top, right corner of the screen, select “Export”.



This will produce a .csv file that downloads in your browser. This is the file that will be selected for upload into the Materials101 EZ Form. Save this file to the desired location on your computer, but **do NOT rename this file or change the file extension.** If you rename the file or change the file extension, the Materials101 EZ Form will not work.

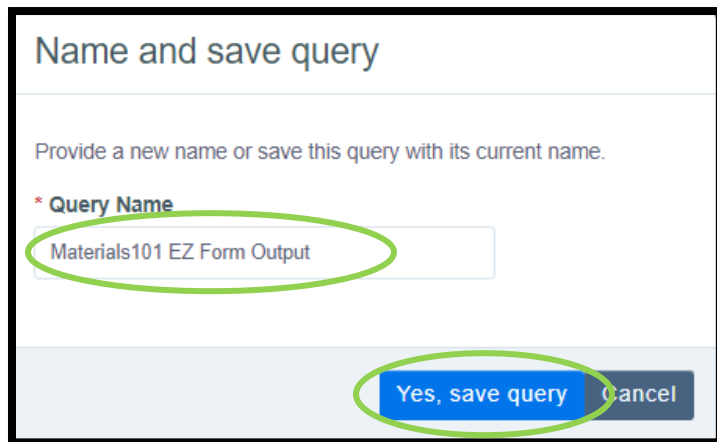


When you've completed the selections above, either before or after exporting the file, save the report by selecting "Save" from the "Actions" pull-down in the top, right corner.



The screenshot shows the 'Query Builder' interface. On the left is a sidebar with 'OVERVIEW', 'QUERY', 'ALL REPORTS', and a calendar icon. The main header displays 'Projects / 52-3715-668 / Query' and project details: '52-3715-668 Under Construction' and 'STP-U-3715(668)--70-52, AcctID- 37766, Letting Date- 18 May 2021'. The 'Query Builder' section has two dropdowns: '* Query On' (set to 'Project Items') and 'Use Saved Query' (set to '** None Selected **'). On the right, there are buttons for 'Report', 'Preview', and an 'Actions' dropdown. The 'Actions' dropdown is open, showing 'Export' and 'Save' options, with 'Save' highlighted by a green circle.

A box will appear that allows you to create a name for the saved query. In the "Query Name" field, enter whatever name is most recognizable for you then click the blue "Yes, save query" button.



The screenshot shows a dialog box titled 'Name and save query'. It contains the instruction 'Provide a new name or save this query with its current name.' Below this is a field labeled '* Query Name' containing the text 'Materials101 EZ Form Output', which is circled in green. At the bottom of the dialog are two buttons: 'Yes, save query' (highlighted with a green circle) and 'Cancel'.

Once you've saved the report, you should be able to select it in the "Use Saved Query" pull-down menu the next time you want to run the report. Once a saved report is selected, the saved fields will automatically show, and the export can be run immediately.

The screenshot displays the 'Query Builder' interface within a software application. The top navigation bar shows the path 'Projects / 52-3715-668 / Query'. Below this, the project details are shown: '52-3715-668' with a red 'Under Construction' status tag, and 'STP-U-3715(668)--70-52, AcctID- 37766, Letting Date- 18 May 2021'. The main area is titled 'Query Builder' and contains two primary sections: 'Query On' and 'Use Saved Query'. The 'Query On' section has a dropdown menu currently set to '** None Selected **'. The 'Use Saved Query' section also has a dropdown menu set to '** None Selected **', but it is open, showing a list of saved queries. The query 'Materials101 EZ Form' is highlighted in blue and circled with a green oval. To the right of the 'Use Saved Query' dropdown are three buttons: 'Report', 'Preview', and 'Actions -'. On the left side of the interface, there is a vertical sidebar with icons and labels for 'OVERVIEW', 'QUERY', 'ALL REPORTS', 'DAILY ACTIVITIES', and 'ITEMS'.

20 - Help Section & Local Systems

Contact Information for Questions and Assistance

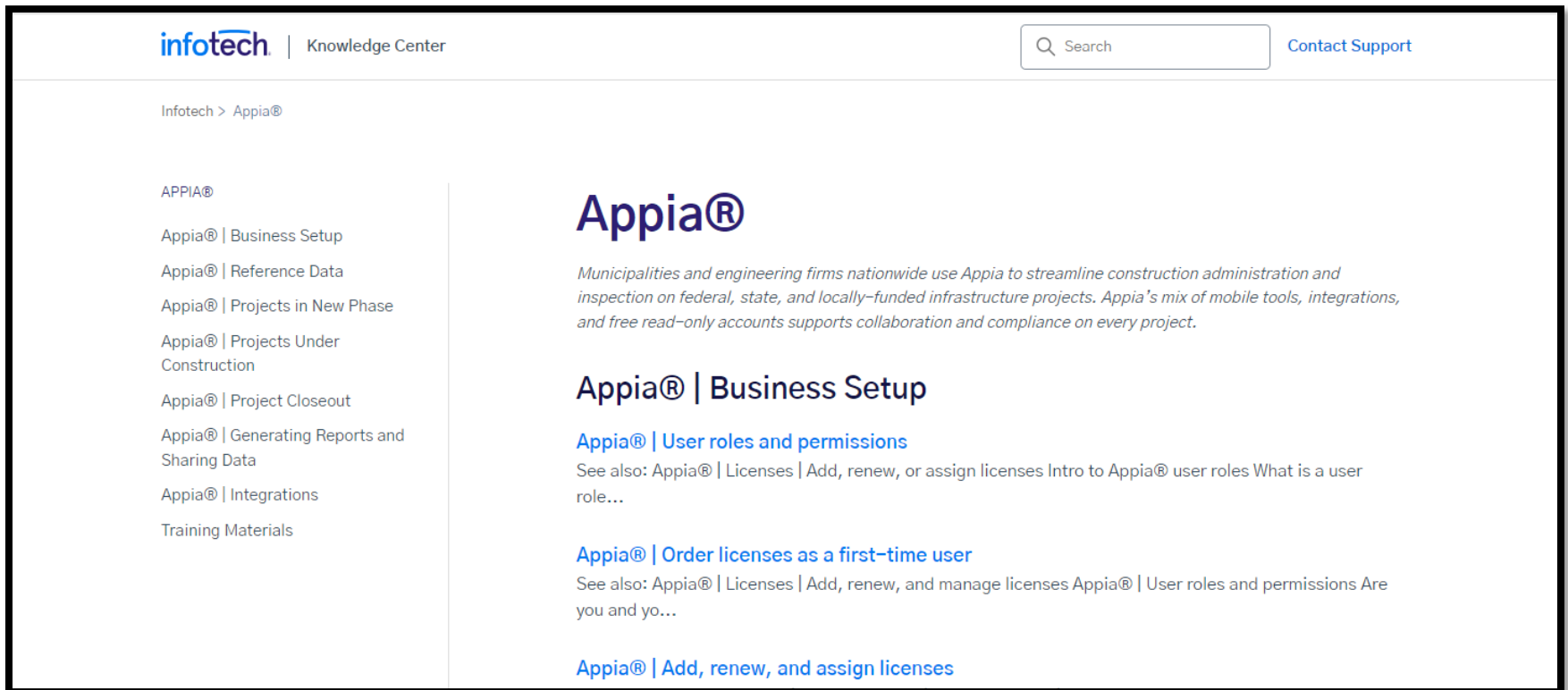
“Help” Site

There is a very useful “Help” site provided by Infotech that can assist you in answering any questions. It is searchable and is indexed by topic. To access the “Help” icon in the upper, right corner of the screen just to the left of your initials. (It is a circle with a question mark (?) inside.) Then, select “Knowledge center” from the drop-down menu.

The screenshot displays the Appia software interface. In the top right corner, there is a help icon (a circle with a question mark) circled in green. A dropdown menu is open from this icon, showing three options: "Support", "Knowledge Builder", and "Knowledge center" (which is also circled in green). The main content area shows a project overview for "21-C021-153" with a status of "Under Construction". The interface includes a left sidebar with navigation options like "OVERVIEW", "QUERY", and "ALL REPORTS". At the bottom, there is a table with financial data.

General Information	
Awarded Amount	\$4,553,445.96
Authorized Amount	\$4,750,603.96

The “Help” site opens in a new browser tab and is shown here.



Local Systems Contact Information

Contact Niki Stinn and/or Derek Peck in the [Iowa DOT Local Systems Bureau](#) as shown below with any questions.

Account set-up and management assistance, Technical assistance

Derek Peck

Title: e-Construction Administrator

Email: Derek.Peck@iowadot.us

Phone: 515-239-1391

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

Hours: 7:30am-4:30pm (Hours may vary)

Technical assistance

Niki Stinn

Title: Secondary Roads Engineer

Email: Niki.Stinn@iowadot.us

Phone: 515-239-1064

(Messages forwarded. Leave message if unanswered.)

Days: Monday-Friday

Hours: 8:30am-4:30pm (Hours may vary)