Chapter 3 Functions

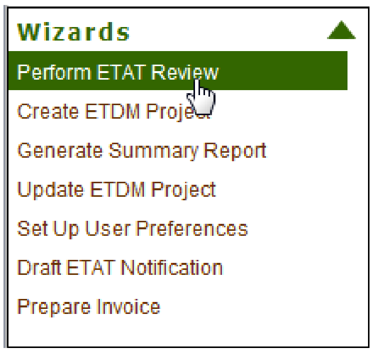
3.3 Wizards (Updated 02/15/2016)

The EST wizards make it easy for you to perform tasks related to a specific project and to set up personal preferences for managing EST information. The functions listed in the **Wizards** menu walk you through a process, asking you to complete an action one step at a time.

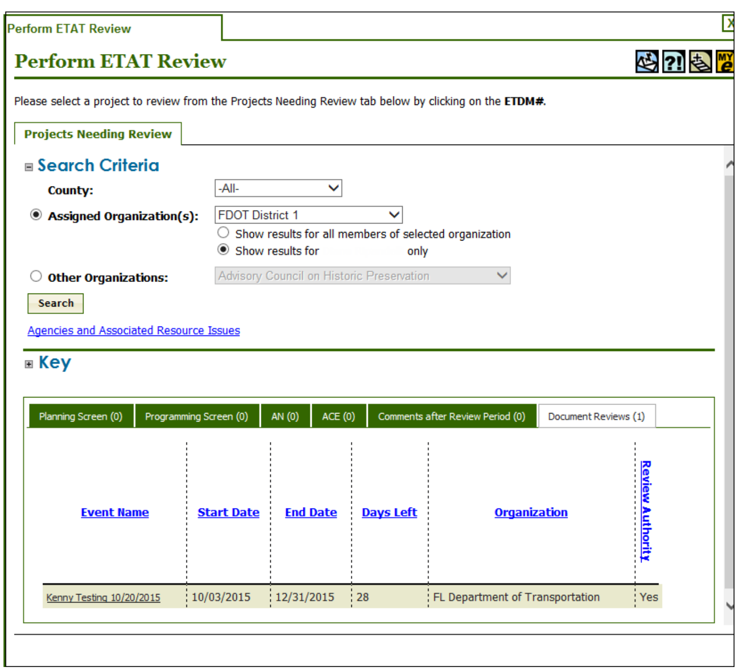
3.3.1 Perform ETAT Review (Updated 02/15/2016)

The **Perform ETAT Review** wizard allows you to view the list of projects requiring your review.

1. On the **Wizards** menu, click **Perform ETAT Review**.



The **Perform ETAT Review** wizard includes sequential tabbed screens for the following steps in conducting a review:



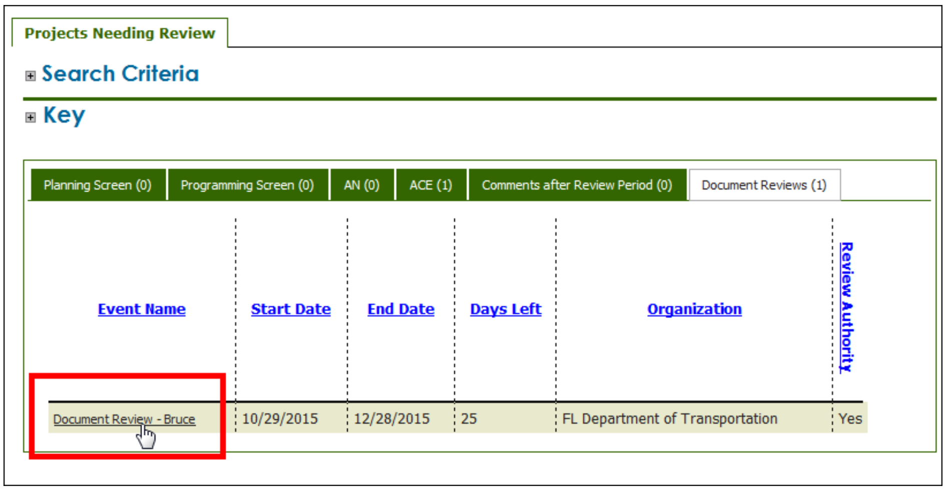
2. Use the **Search Panel** to drill-down your search criteria.

3. Information will be listed under the associated tab.

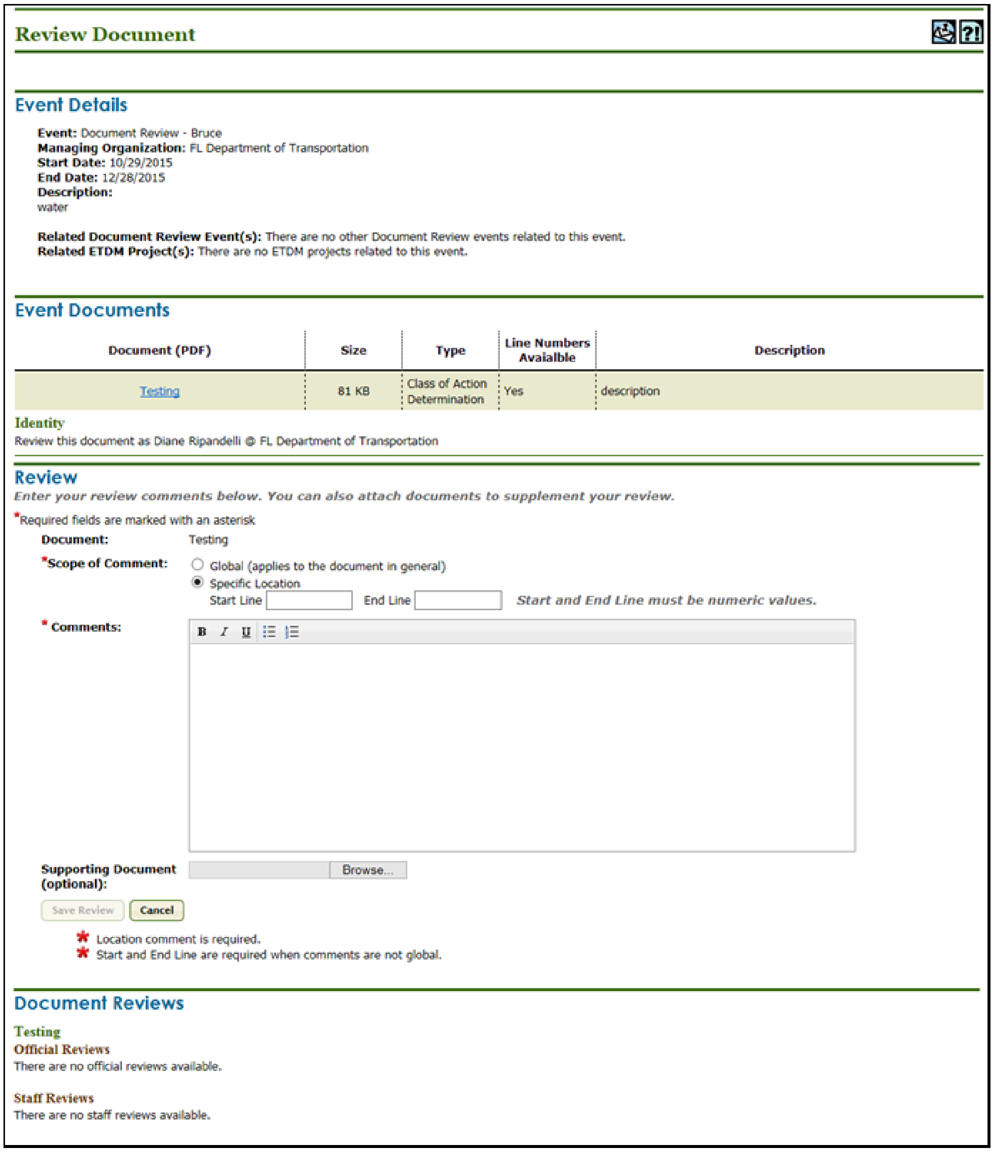
Tip! You can click the tab in any order.

On the **Document Reviews** panel you will find the events that are currently in review along with the review period and number of days left.

4. In the **Event Name** column, click the project name.



The **Review Document** page opens, displaying the documents associated with the review and a form for entering your review comments.



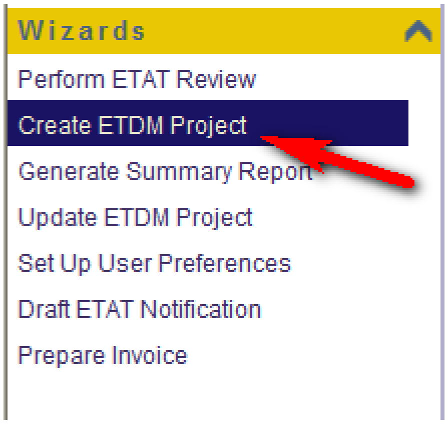
5. Click **Save Review**.

3.3.2 Create New Project (Updated 04/30/2012)

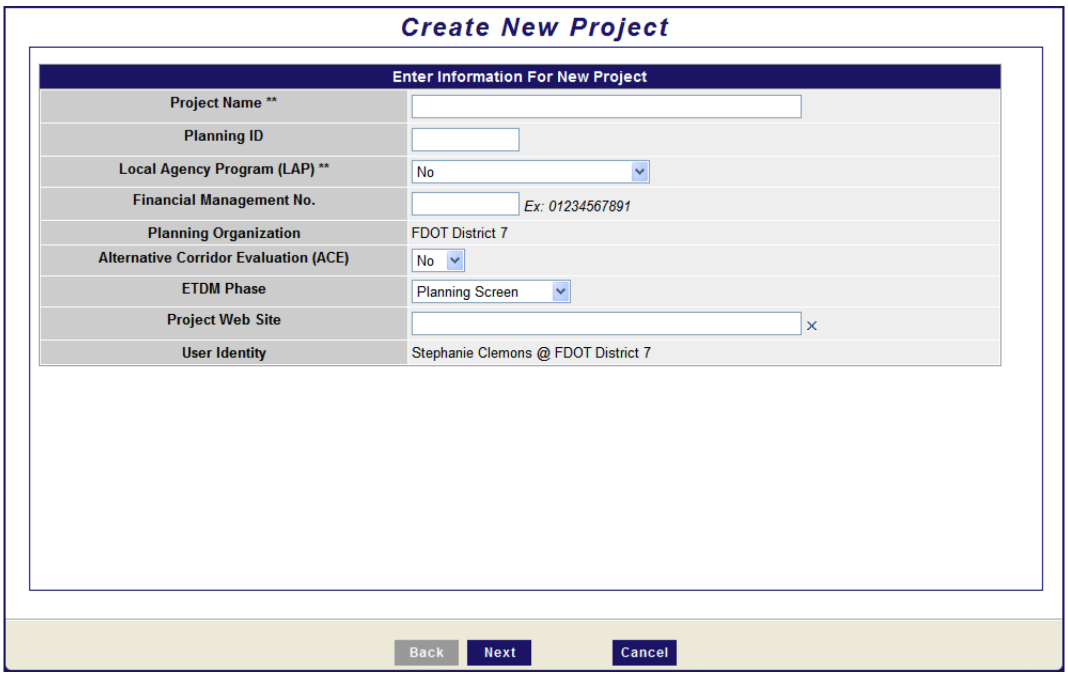
The **Create New Project** function in the **Wizards** menu enables authorized users to do the following:

- Add a new project to the Environmental Screening Tool (EST) database.
- Designate a project as a Local Agency Program (LAP) project, assign a new or existing LAP agency, and enter the assigned LAP agency's PD&E LAP certification status.

1. On the **Wizards** menu, click **Create ETDM Project**.



The **Create New Project** page opens, displaying a form for entering general project information.



Create New Project

Enter Information For New Project	
Project Name **	
Planning ID	
Local Agency Program (LAP) **	No
Financial Management No.	Ex: 01234567891
Planning Organization	FDOT District 7
Alternative Corridor Evaluation (ACE)	No
ETDM Phase	Planning Screen
Project Web Site	×
User Identity	Stephanie Clemons @ FDOT District 7

Back Next Cancel

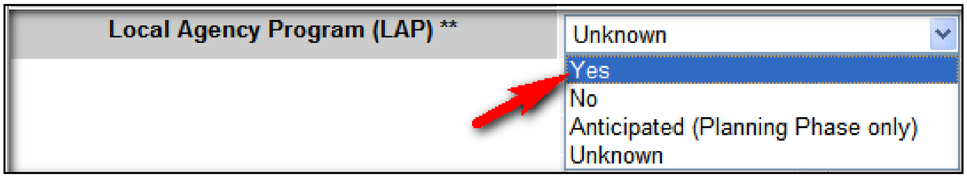
2. Under **Enter Information For New Project**, do the following:

- In the **Project Name**** and **Planning ID** fields, enter the Project Name and the assigned Planning ID for the project.

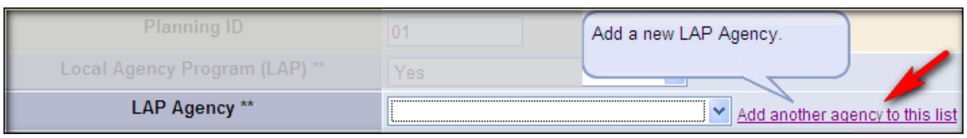
  Note: Double asterisks (**) indicate a required field. If the field is blank, the information must be added before the form can be processed.

- In the **Local Agency Program (LAP)**** field, click the drop-down arrow, , and then do one of the following:
  - Leave **Unknown** as the default selection if the project's LAP status has not yet been determined. Move on to the Financial Management No. field.
  - Click the drop-down arrow, , and then do one of the following:

- Click **Yes** if the project is a LAP project.
- Click **No** if the project is not a LAP project. Move on to the Financial Management No. field.
- Click **Anticipated (Planning Phase only)** if LAP designation is anticipated.



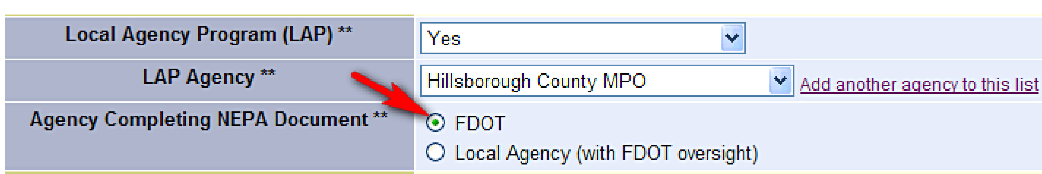
- If you selected **Yes** or **Anticipated (Planning Phase only)**, the **Enter Information For New Project** form displays fields for adding LAP information. Do the following:
  - For **LAP Agency****, select the LAP agency responsible for the project by doing one of the following:
    - Click the **LAP Agency** arrow, , to expand the list, and then select an agency by clicking on the agency name.
    - If the LAP Agency is not listed, click the **Add another agency to this list** link, and then type the name of the agency in the text box.



Tip! You need to type only the first three letters of the name. The EST automatically displays a list of names that match your text. Click the appropriate selection from the list.

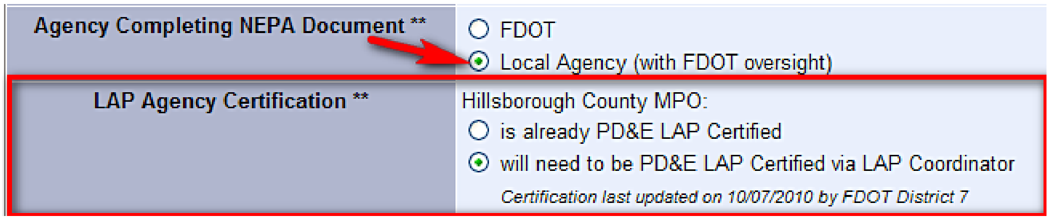
If the agency is being added for the first time, type the agency's entire name. The agency will be added to the database.

  - In the **Agency Completing NEPA Document** field, do one of the following:
    - Click the **FDOT** option button if FDOT will be completing the NEPA document, and then go to Financial Management No. field.



    - Click the **Local Agency (with FDOT oversight)** option button if the local agency will be completing the NEPA document. The **LAP Agency Certification** field appears, displaying options for the agency's PD&E LAP Certification status.

Note: Local agencies must be PD&E LAP Certified if completing the NEPA document with FDOT oversight.



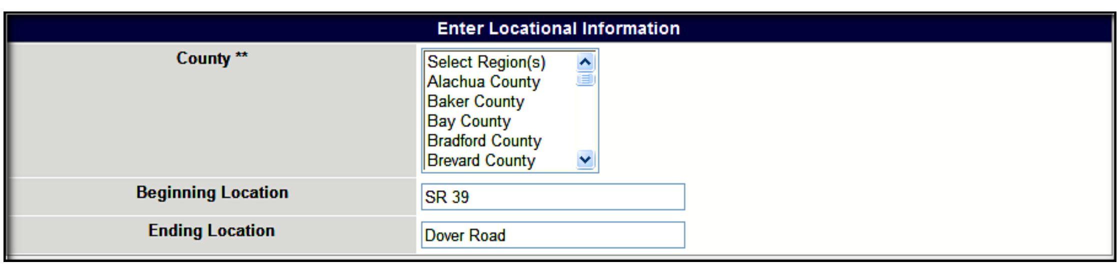
- In the **LAP Agency Certification** field, click the appropriate option button beside one of the following LAP Certification statements:
  - **is already PD&E LAP Certified** (The agency selected in the **LAP Agency** field has completed the Local Agency Certification Qualification Agreement and has been approved by the District LAP Coordinator.)
  - **will need to be PD&E LAP Certified via LAP Coordinator** (The agency selected in the **LAP Agency** field is pending approval by the District LAP Coordinator.)

Note: The agency must be certified by the District LAP Administrator for the type of work it will be performing. Once the project is created, the District LAP Administrator will receive an email notification about the project's LAP designation and whether the need for agency certification has been indicated.

- Complete the remaining fields:
  - **Financial Management No.** — Enter the Financial Management Number, if available.
  - **Alternative Corridor Evaluation (ACE)** — Indicate whether or not this project is participating in the ACE process by either accepting the default **No** or by clicking the drop-down arrow, , and then selecting **Yes**.
  - **ETDM Phase** — Click the **ETDM Phase** arrow, and then select one of the project phases.
  - **Project Web Site** – Type one or multiple URLs to websites related to the project, if available.

3. Click **Next**.

The **Create ETDM Project** wizard displays the **Enter Locational Information** screen.



4. Under **Enter Locational Information**, complete the following fields:

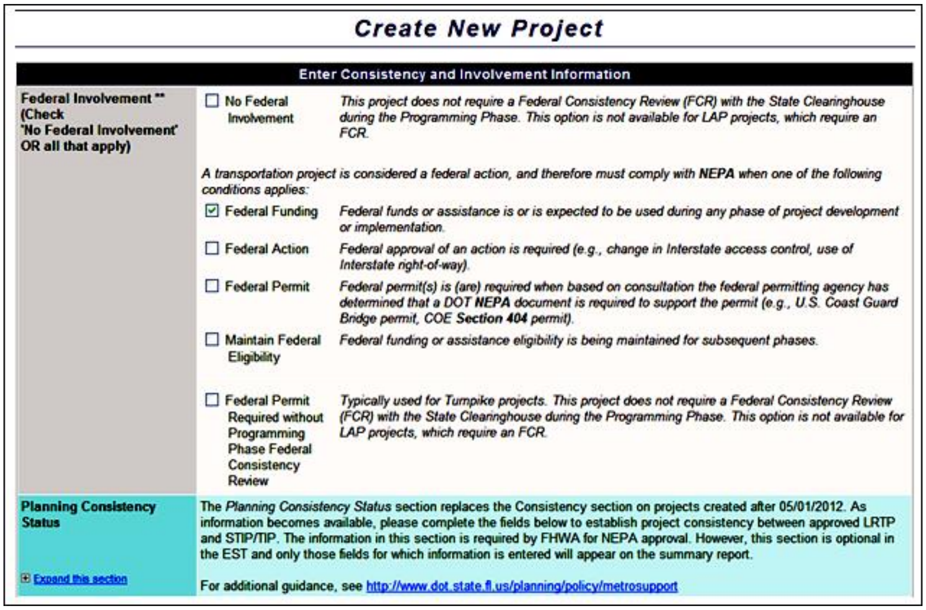
- **County****— Use the **County** scroll bar to move down the list. Select one or multiple options by clicking the **County** name(s).

Tip! Use **SHIFT+click** to select adjacent options. Use **CTRL+click** to select non-adjacent options.

- **Beginning Location** -– Make edits, if any, to the project's beginning location by typing your changes in the text box.
- **Ending Location** -– Make edits, if any, to the project's ending location by typing your changes in the text box.

5. Click **Next**.

The **Create ETDM Project** wizard displays the **Enter Consistency and Involvement Information** screen.

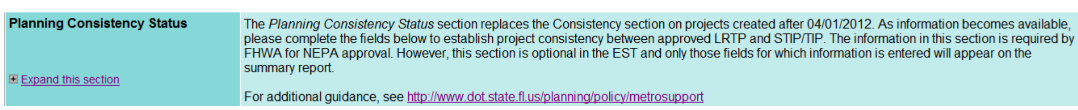


Create New Project

Enter Consistency and Involvement Information		
Federal Involvement ** (Check 'No Federal Involvement' OR all that apply)	☐ No Federal Involvement	*This project does not require a Federal Consistency Review (FCR) with the State Clearinghouse during the Programming Phase. This option is not available for LAP projects, which require an FCR.*
	*A transportation project is considered a federal action, and therefore must comply with **NEPA** when one of the following conditions applies:*	
	☑ Federal Funding	*Federal funds or assistance is or is expected to be used during any phase of project development or implementation.*
	☐ Federal Action	*Federal approval of an action is required (e.g., change in Interstate access control, use of Interstate right-of-way).*
	☐ Federal Permit	*Federal permit(s) is (are) required when based on consultation the federal permitting agency has determined that a DOT **NEPA** document is required to support the permit (e.g., U.S. Coast Guard Bridge permit, COE **Section 404** permit).*
	☐ Maintain Federal Eligibility	*Federal funding or assistance eligibility is being maintained for subsequent phases.*
	☐ Federal Permit Required without Programming Phase Federal Consistency Review	*Typically used for Turnpike projects. This project does not require a Federal Consistency Review (FCR) with the State Clearinghouse during the Programming Phase. This option is not available for LAP projects, which require an FCR.*
Planning Consistency Status ⊞ Expand this section	The *Planning Consistency Status* section replaces the Consistency section on projects created after 05/01/2012. As information becomes available, please complete the fields below to establish project consistency between approved LRTP and STIP/TIP. The information in this section is required by FHWA for NEPA approval. However, this section is optional in the EST and only those fields for which information is entered will appear on the summary report. For additional guidance, see http://www.dot.state.fl.us/planning/policy/metrosupport	

- **Federal Involvement**** -– Click the appropriate check box(es) to indicate the level of Federal Involvement (or No Federal Involvement) for the project. Descriptions for the various levels are provided beside each option listed on the screen.
- **Planning Consistency Status** -– This section provides an efficient means to enter and track project consistency information that is required for NEPA approval.

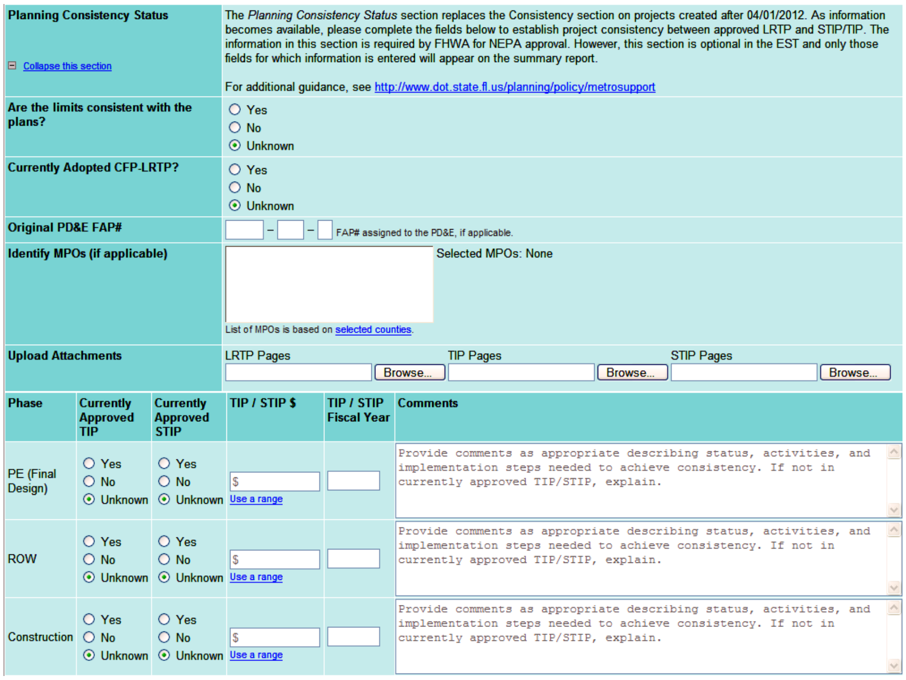
Note: Project consistency information is mandatory for NEPA approval. However, providing the information via the EST is optional.



Planning Consistency Status ⊞ Expand this section	The *Planning Consistency Status* section replaces the Consistency section on projects created after 04/01/2012. As information becomes available, please complete the fields below to establish project consistency between approved LRTP and STIP/TIP. The information in this section is required by FHWA for NEPA approval. However, this section is optional in the EST and only those fields for which information is entered will appear on the summary report. For additional guidance, see http://www.dot.state.fl.us/planning/policy/metrosupport

  - Click the **Expand this section** link to display the form.
  - Enter the information in the fields and select the appropriate values from the options that are presented. Only fields that have been completed and fields where either a **Yes** or **No** option has been selected will appear in the report.

Tip! Click the URL link **http://www.dot.state.fl.us/planning/policy/metrosupport** shown on the screen to get the latest Planning Consistency guidance or download the spreadsheet from **FDOT's Metropolitan and Regional Support** website.



Planning Consistency Status Collapse this section	The *Planning Consistency Status* section replaces the Consistency section on projects created after 04/01/2012. As information becomes available, please complete the fields below to establish project consistency between approved LRTP and STIP/TIP. The information in this section is required by FHWA for NEPA approval. However, this section is optional in the EST and only those fields for which information is entered will appear on the summary report. For additional guidance, see http://www.dot.state.fl.us/planning/policy/metrosupport
Are the limits consistent with the plans?	Yes No Unknown
Currently Adopted CFP-LRTP?	Yes No Unknown
Original PD&E FAP#	– – FAP# assigned to the PD&E, if applicable.
Identify MPOs (if applicable)	Selected MPOs: None List of MPOs is based on selected counties.
Upload Attachments	LRTP Pages Browse... TIP Pages Browse... STIP Pages Browse...

Phase	Currently Approved TIP	Currently Approved STIP	TIP / STIP $	TIP / STIP Fiscal Year	Comments
PE (Final Design)	Yes No Unknown	Yes No Unknown	$ Use a range		Provide comments as appropriate describing status, activities, and implementation steps needed to achieve consistency. If not in currently approved TIP/STIP, explain.
ROW	Yes No Unknown	Yes No Unknown	$ Use a range		Provide comments as appropriate describing status, activities, and implementation steps needed to achieve consistency. If not in currently approved TIP/STIP, explain.
Construction	Yes No Unknown	Yes No Unknown	$ Use a range		Provide comments as appropriate describing status, activities, and implementation steps needed to achieve consistency. If not in currently approved TIP/STIP, explain.

Note: Selecting **No** requires a written explanation. Type or copy and paste the explanation into the appropriate **Comments** text box. Instructions for what needs to be included in your explanation are displayed in light font within the **Comments** text boxes.

6. Click **Next**.

7. Complete the fields in the following screens:

   - **Enter Purpose and Need Statement** –– Type or copy and paste the Purpose and Need Statement in the text box, and then click **Next**.

     Tip! To copy and paste text from another document, highlight the selected text and then click **Ctrl** + **C** on your keyboard to copy the information. Click **Ctrl** + **V** keys to paste the information in the text box.

   - **Enter Project Summary Description** –– Type or copy and paste a description of the project in the text box, and then click **Next**.

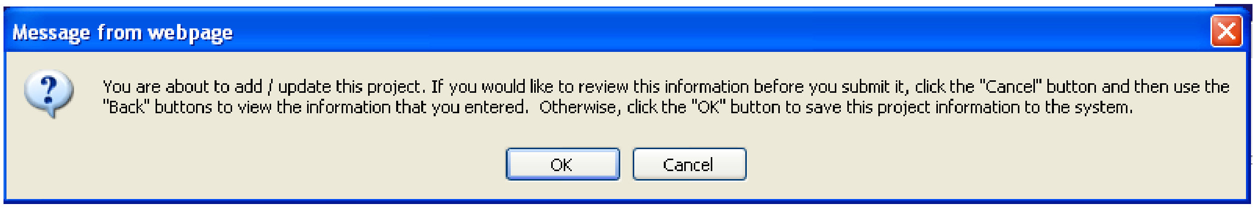
   - **Summary of Public Comments** –– Click the **Summarize/Modify Public Comments** link to open the **Summarize/Modify Public Comments** page, and then enter the appropriate information in the fields provided. Click **Next** on the wizard screen when done.

   - **Add Exemptions** –– Select or add an agency to the exemption list and type the justification for the exemption in the **Justification** text box beside each selected agency.

     Note: The **Federal Transit Administration (FTA)** is exempted by default on all Planning Phase projects that do not contain a transit mode. However, if the project will contain a transit mode or if there is a reason the FTA needs to review the project, you can remove the FTA exemption by clicking the **remove** link.

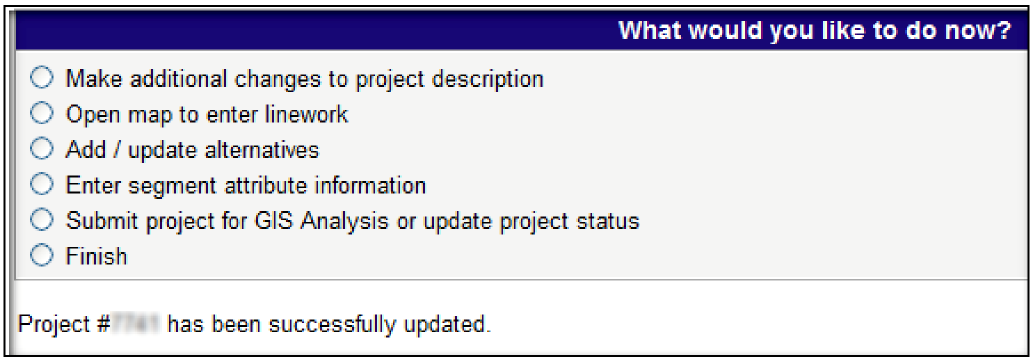
8. Click **Next**.

The EST displays a confirmation message, giving you the option to review the information before submitting it or to proceed with saving your changes.



9. Click **OK** to save the information or click **Cancel** to review the previous screens.

After clicking **OK**, the wizard displays the **What would you like to do now?** screen showing options for your preferred action regarding the project, along with a message that the project has been successfully updated with your changes up to this point.



10. Click the option button beside one of the following preferred actions, and then click **Next**:

- **Make additional changes to project description** — Returns you to the first screen of the **Create/Update Project Wizard**
- **Open map to enter linework** — Opens the **Project Input Map** viewer
- **Add/update alternatives** — Opens the **Select an Alternative** and **Add/Update Alternative** screens in the wizard
- **Enter segment attribute information** — Opens the **Select an Alternative**, **Update Segment**, and **Update Segment Information** screens in the wizard
- **Submit project for GIS Analysis or update project status** — Opens the **Update Project Status** tool
- **Finish –** Completes the process

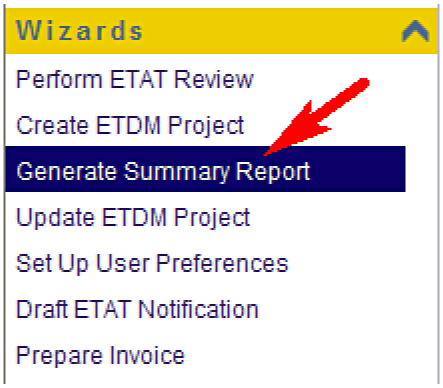
3.3.2.1 GIS Data Quality Review Checklist

A clear representation of a project's extent and location is essential for accurate reviews and commentary by the Environmental Technical Advisory Team (ETAT) and the public. After digitizing features in the Environmental Screening Tool (EST), or submitting them to be loaded into the geographic information system (GIS) database, use the following list to help identify and correct errors:

- Verify that the number of mapped Alternatives is equal to the number of Alternatives described in the **Project Description Report**.
- If the GIS features were loaded into the EST from another source, compare the version in the EST with the source to verify that all features loaded correctly.
- Confirm that mapped Alternative endpoints are consistent with the **From** and **To** locations described in the **Project Description Report**.
- Check the relationships among the map features representing your project (also known as "topology"):
  - Lines – Alternative segments are adjoined at their respective endpoints unless otherwise intended, and there are no duplicate lines representing the same feature
  - Polygons – coincident borders of areas should not overlap, nor should there be gaps between the areas unless otherwise intended
  - Points – only one point represents the feature unless otherwise intended
- Compare the location of project features to other features represented on the map:
  - Zoom to a scale of 1:5000 or less at the endpoint of an Alternative. This scale allows you to use the most detailed aerials available in the EST – 1-foot Resolution Digital Orthophoto Imagery (DOI).
  - Turn on map layers that will help confirm locational accuracy, such as the following:
    - DOI Aerials
    - Navteq Roads, railroads or other layers containing useful information for confirming feature locations
    - Layers showing resources you plan to avoid (schools, hospitals, parks, etc.)
  - Using the **Pan** tool, move along each project feature, looking to see if it is in the right place relative to other features on the map and consistent with the project description you provided. If the project is intended to avoid a sensitive resource in the area, confirm that the project does not intersect the resource. For example:
    - If an Alternative is intended to be within an existing road right-of-way, confirm that it is in fact within a few feet of a road.
    - If an Alternative is intended to avoid a particular park, turn on a layer like Florida Natural Areas Inventory's (FNAI's) Florida Managed Areas to confirm that the Alternative does not intersect the park boundary.
- Compare the value of the length field for a project Alternative against the total length value entered in the **Add/Update Alternative Description** form.

3.3.3 Publish Summary Report Wizard (new 12/12/2005)

The **Publish Summary Report Wizard** includes the steps needed to generate a Planning Summary Report or Programming Summary Report. To use the **Generate Summary Report** wizard, first select a project (or projects) using the **Project Navigation Bar**, then click on **Wizards** on the main menu, and select **Generate Summary Report**.



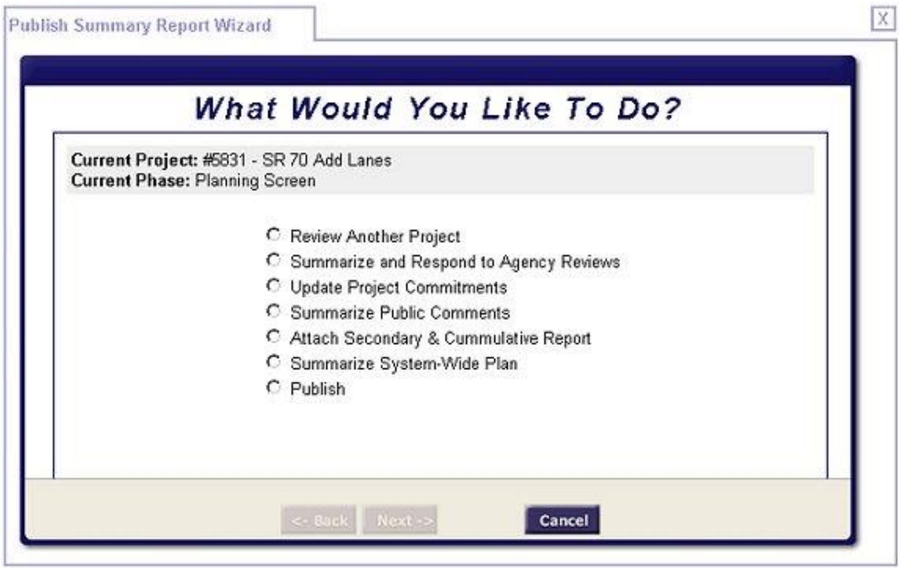
The **Generate Summary Report** wizard includes sequential screens for completing tasks associated with a Planning Summary Report or Programming Summary Report, depending on the project selected. The first screen lists the tasks.

First, select a task by clicking the option button next to a task name (for example, “Summarize and Respond to Agency Reviews”), then click **Next**. Follow the instructions on each screen to complete the task.

Use the Next -> button to save actions completed on each screen and continue to the next step for the task. Use the <- Back button to return to the previous step. When finished with a task, use the <- Back button to return to the task list. Use the Cancel button to stop the task without saving the work completed in the current form and return to the task list.

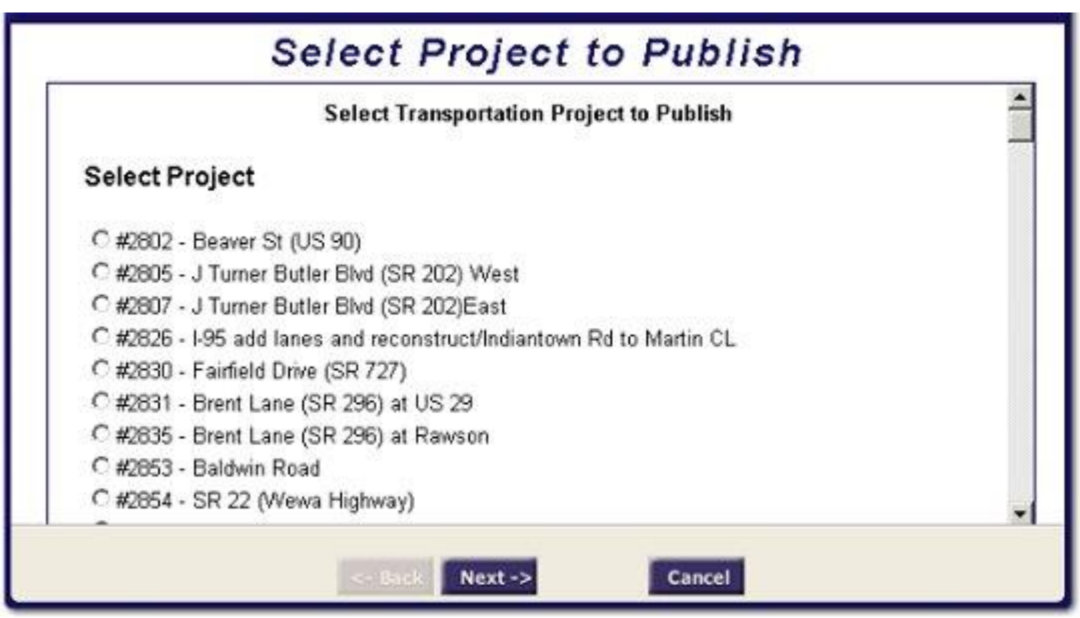
3.3.3.1 Planning Summary Report

If the project selected is in the Planning Screen phase, the form that opens will list tasks associated with generating a Planning Summary Report. Tasks associated with generating a Planning Summary Report are described below.



Review Another Project

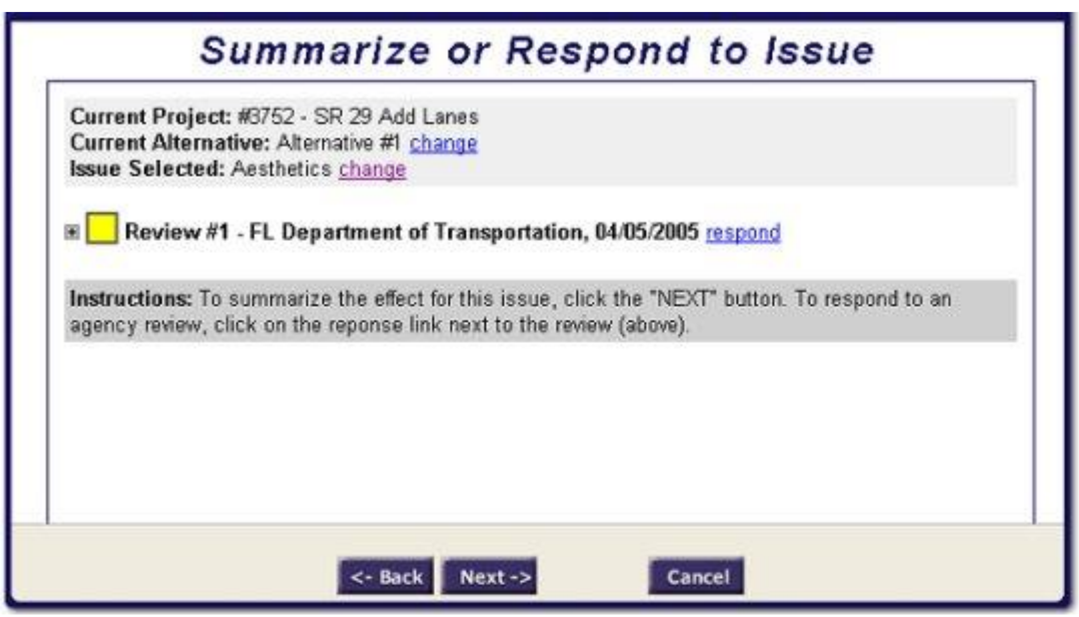
To select a different project to review, click on the option button next to “Review Another Project.” Then click “Next.” The form that opens lists all projects that have the status “ETAT Review Complete.” Select a project by clicking the option button next to the project name. Then click “Next.” The information for this project will then appear on the “What Would You Like To Do?” page of the wizard. Proceed with the review of this project by selecting a task on the “What Would You Like To Do?” page (shown above).



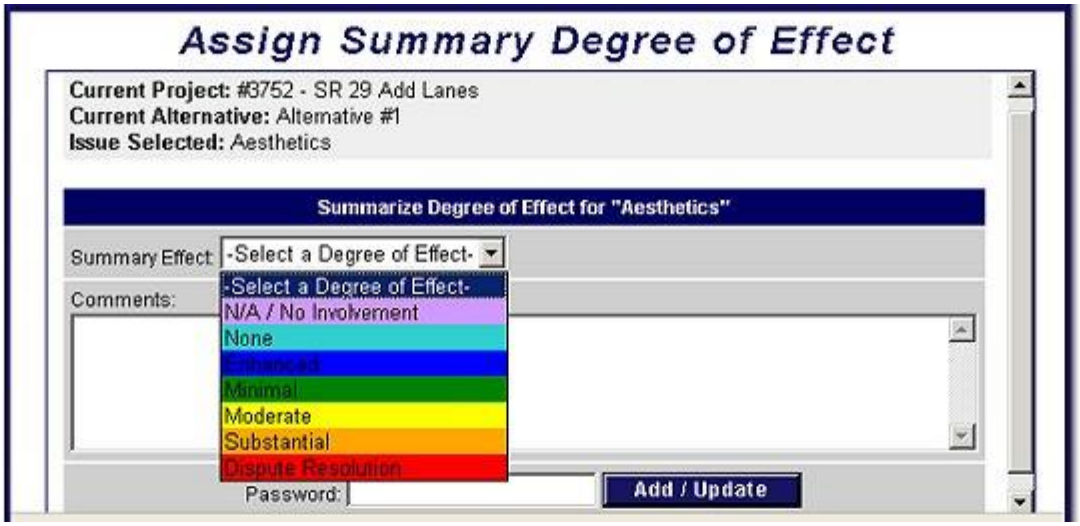
Summarize and Respond to Agency Reviews

The form shown below appears when you select "Summarize and Respond to Agency Reviews." Select an issue by clicking on the option button next to the issue name, then click "Next."

In the example shown below, Aesthetics was selected. To summarize or respond to another issue, click the "change" link beside "Issue Selected." To summarize or respond to issues for a different project alternative, click the "change" link beside "Current Alternative." To summarize the degree of effect for an issue, click the "Next" button at the bottom of the screen.

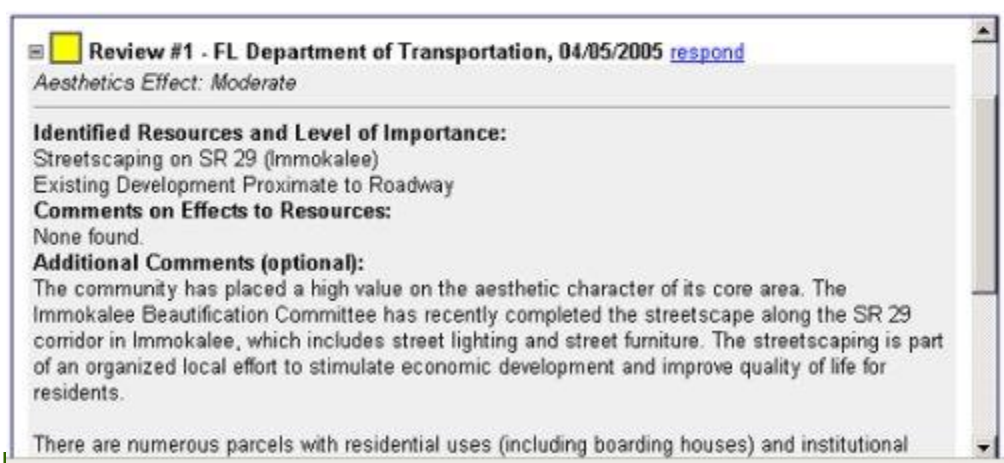


Select a degree of effect from the "Summary Effect" pull-down menu, then enter your agency password and click "Add/Update."

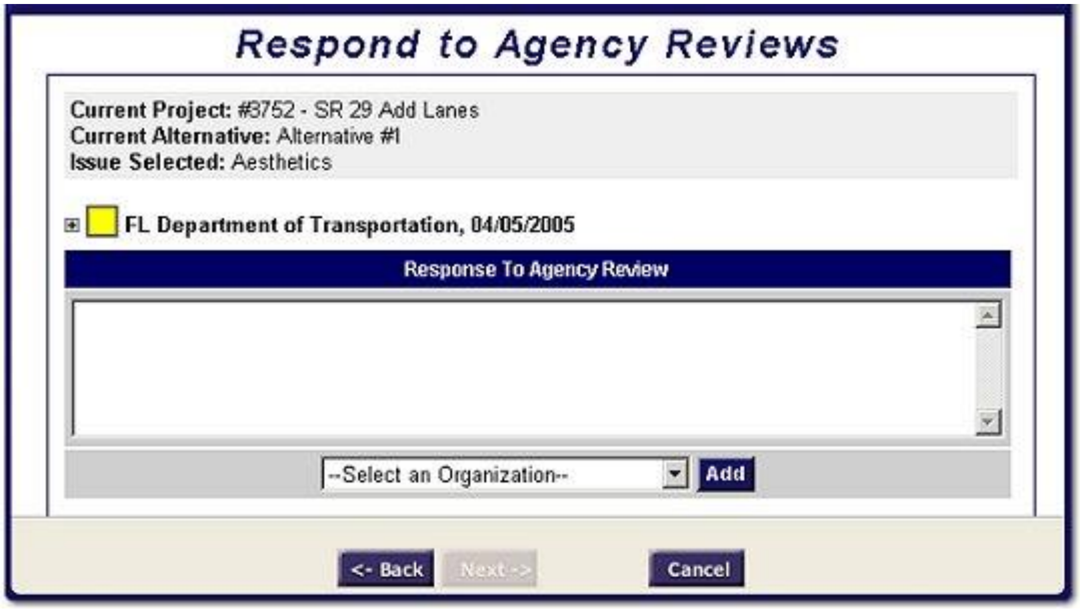


A message will appear indicating that comments for the issue have been summarized; and when you return to the "Select Issue to Review" screen, a blue check mark (✓) beside the issue name will indicate that the degree of effect has been summarized, as shown below. Select another issue, and follow the same procedure to summarize the degree of effect for that issue.

To view details of an agency's response, including comments, click + next to the agency's name. Use the "respond" link to reply to specific agency comments.



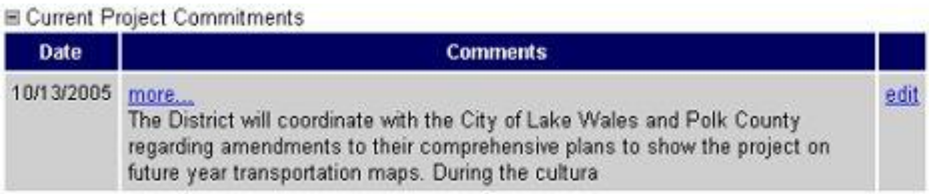
Enter the response to in the text box, then select your organization identification from the pull-down menu and click “Add.” The response can be typed directly in the text box, or text can be copied and pasted from another document.



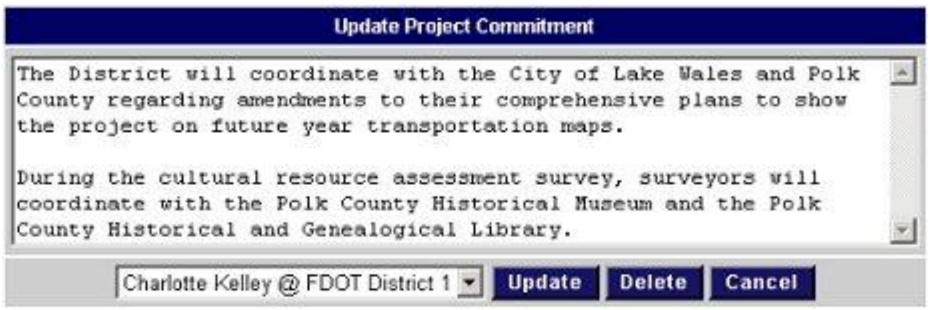
Update Project Commitments

The “Update Project Commitments” form is shown below. Click + next to “Current Project Commitments” to view the commitments, or use the text box to add a new project commitment. To add a new project commitment, type directly in the text box under “Add New Project Commitment” or cut and paste text from another document. Then select your agency identification from the pull-down menu and click “Add.”

To update a current project commitment, click the "edit" link on the right-hand side of the screen, next to the description of the commitment. (The "more" link can be used to view the complete text of a comment.)

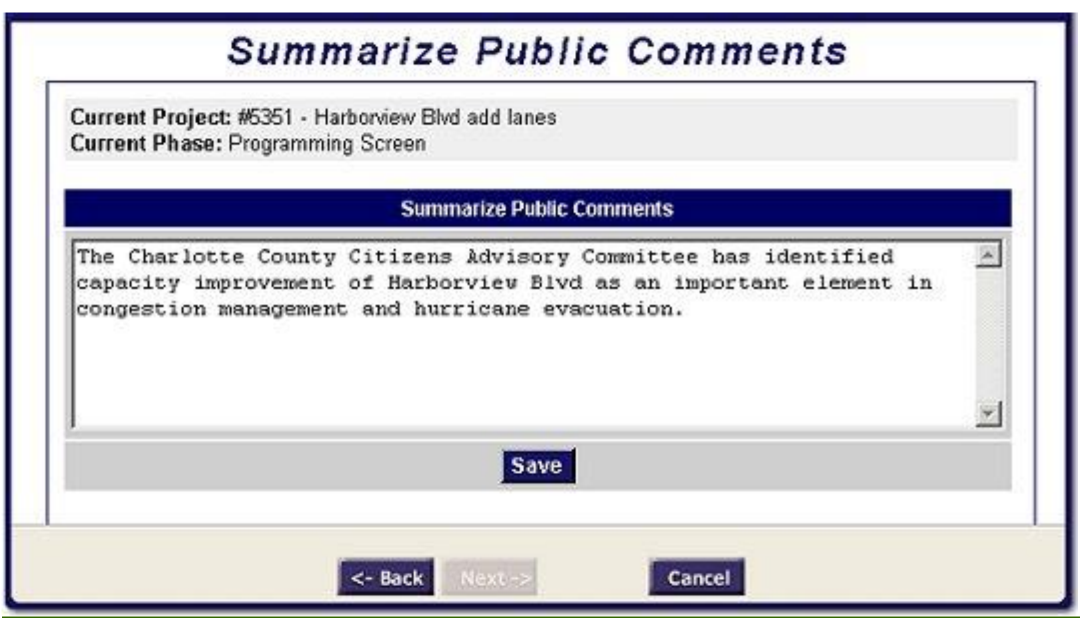


The form that opens when you click the "edit" link contains a text box with the full text of the project commitment. Make changes to the text by typing directly in the text box. Text can also be deleted. When finished, select your agency identification from the pull-down menu, then click "Update." The commitment can be removed from the project record by clicking "Delete." To cancel any changes made within the text box, click the "Cancel" button to the right of the "Delete" button.



Summarize Public Comments

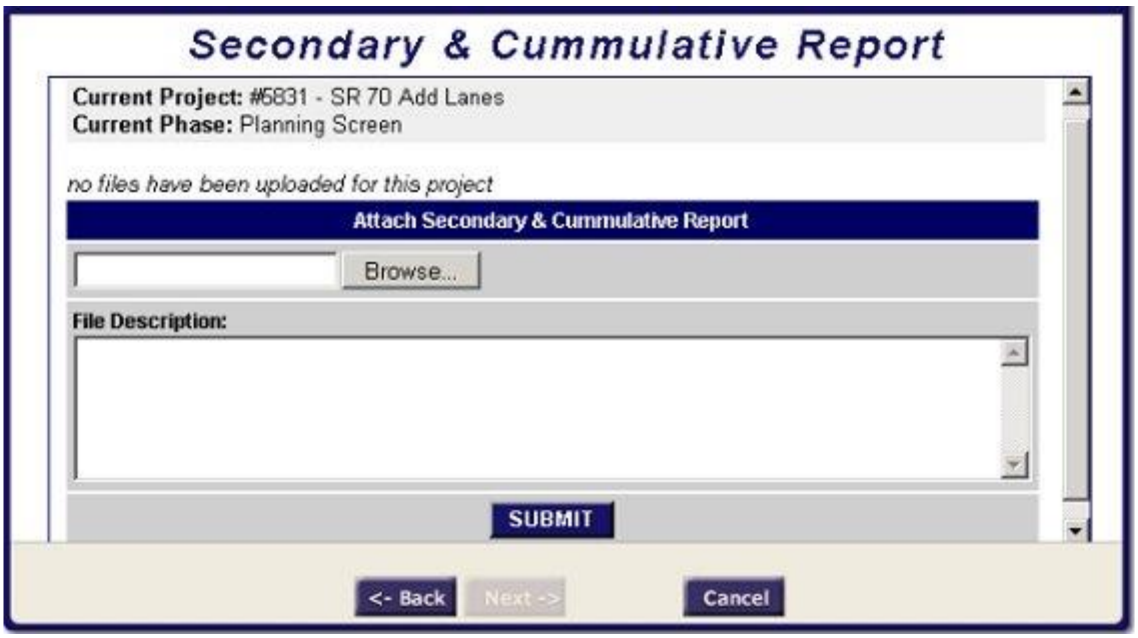
The form that opens when you select "Summarize Public Comments" is shown below. To add the public comment, as it appears on the screen, to the Planning Summary Report, click "Save." Make changes to the comment by typing directly in the text box under "Summarize Public Comments." Text can also be deleted. When finished, click "Save."



The screen that appears next indicates that the comments have been summarized. Click the "Next" button at the bottom of the screen to begin a new task.

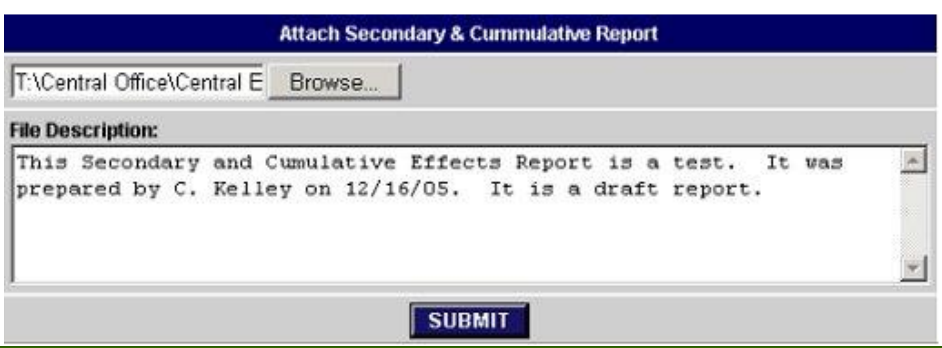
Attach Secondary & Cumulative Report

A Secondary and Cumulative Effects Report can be added to the project record by clicking the option button next to "Attach Secondary & Cumulative Report." The form that opens is shown below. Use the "Browse" button to select the document to be added.

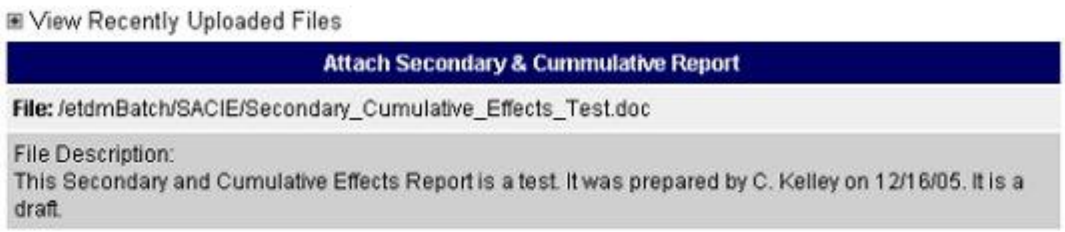


The document to be added should be in Adobe Acrobat™ PDF format. This is an ETDM standard. The tool can support other file formats, but please consider that "what you see is not what you get without the proper software." A document that is in Word Perfect™ may not be useful to MS Word™ users. If it is necessary to attach a non-PDF file, state the file format in the File Description so that other users are aware of it.

The file name, including the location path, will appear in the form, as shown below. Next, enter a description of the document in the text box under "File Description." Include the document's title, author, agency, date, status (preliminary, draft, final, etc.), purpose and applicable remarks. When finished, click "Submit."



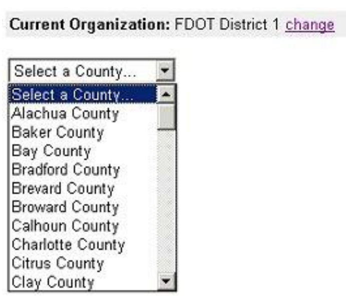
The next screen confirms that the document has been added to the project record. It includes a file name assigned by the EST and the File Description. To view details about the document, including the date it was added to the project record, click + next to "View Recently Uploaded Files."

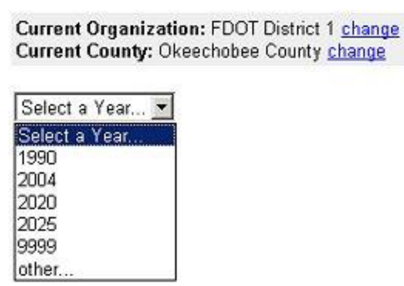


Summarize System-wide Plan

Select the "Summarize System-wide Plan" task to add or modify a Transportation Plan associated with a project. On the form that opens, first select a planning organization from the pull-down menu.

Next, select a County from the pull-down menu, then select the Cost Feasible horizon year for the Transportation Plan from the pull-down menu. (For example, if a project is proposed for the 2025 Long Range Transportation Plan (LRTP), the plan year is 2025.)





On the form that opens, enter a descriptive title of the Transportation Plan in the “Short Description” text box. Then enter the system needs summary and summary of system-wide public comments in the text boxes provided. Use executive summary style with content no more than one page in length. An alternative to manually entering the summaries is to copy and paste from an existing document. To copy from a separate document, select the text, right-click on the highlighted text and choose "Copy" from the pop-up menu. To paste the text into the form, right-click in the appropriate text box on the form and choose "Paste" from the pop-up menu. (The keyboard shortcuts CTRL-C to copy and CTRL-V to paste also work.) When finished, enter your EST password and click “Save.”

Add / Modify Plan Summaries

Current Organization: FDOT District 1 change
Current County: Okeechobee County change
Year: 2025 change

Short Description

System Needs Statement

Summary of System-wide Public Comment

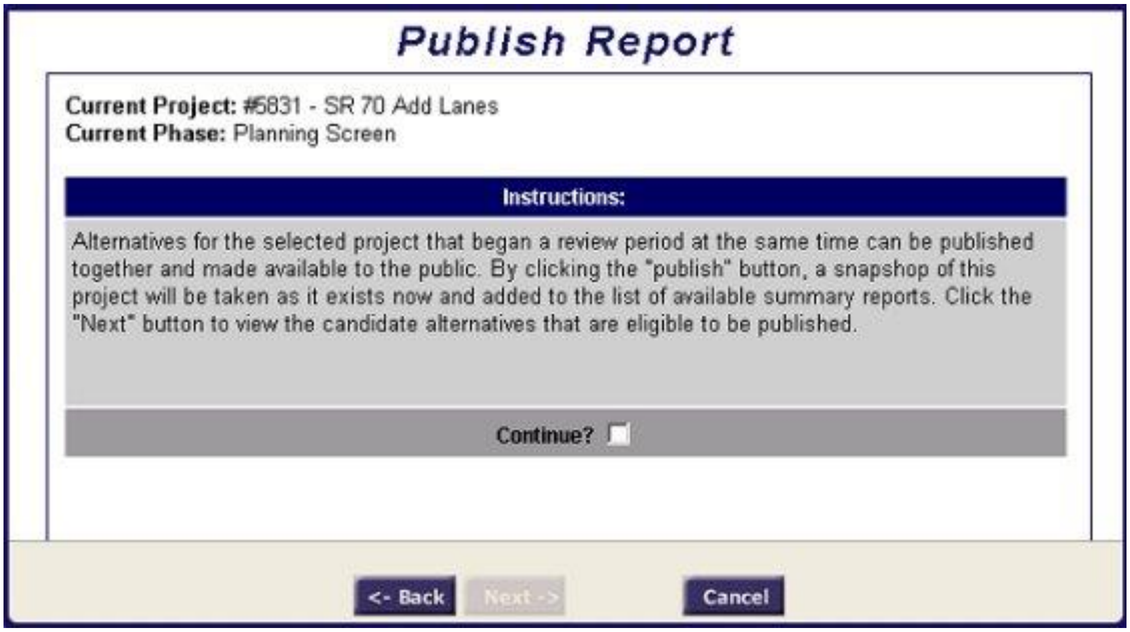
Password: Save

<- Back Next -> Cancel

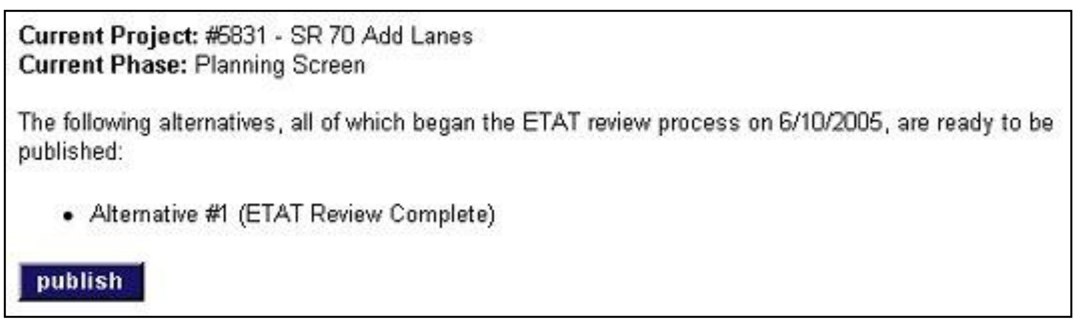
Use the “change” links at any time to enter a different Transportation Plan summary. Use the “Back” or “Cancel” buttons to exit the form without saving the information entered.

Publish

The last step involved in generating a summary report using the “Generate Summary Report” wizard is to make the report available to the ETAT and public. This is accomplished by first clicking the option button next to “Publish” on the “What Would You Like To Do?” page, then clicking “Next.” The form that opens includes information concerning the summary report that will be generated. Click the check box next to “Continue?”

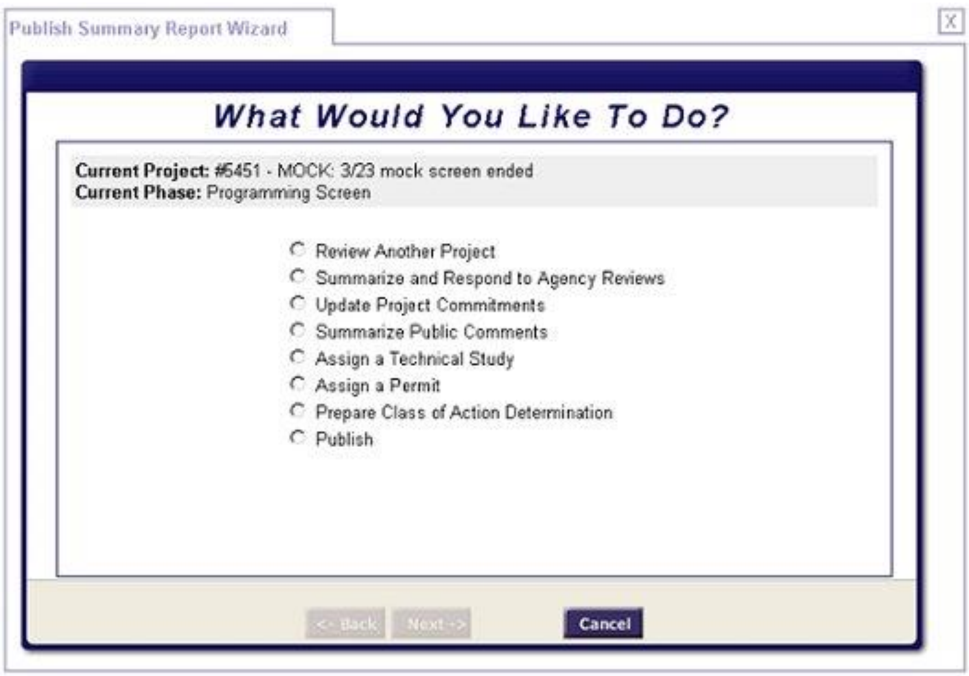


The next screen lists the project alternatives for which a Planning Summary Report can be published. To continue, click “Publish.” The Planning Summary Report will then be added to the list of summary reports available in the EST, and can be accessed by the ETAT and the public.



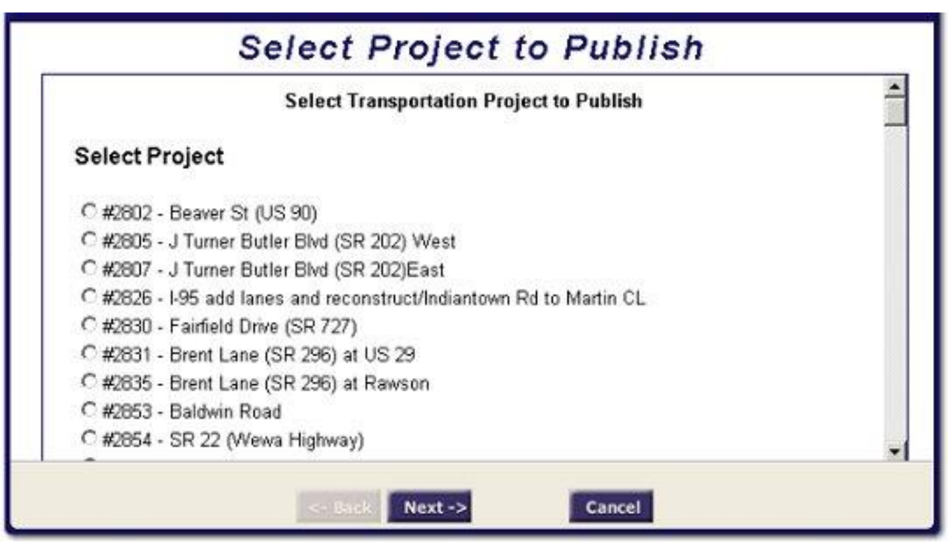
3.3.3.2 Programming Summary Report

If the project selected is in the Programming Screen phase, the form that opens will list tasks associated with generating a Programming Summary Report. Each task for generating a Programming Summary Report is described below.



Review Another Project

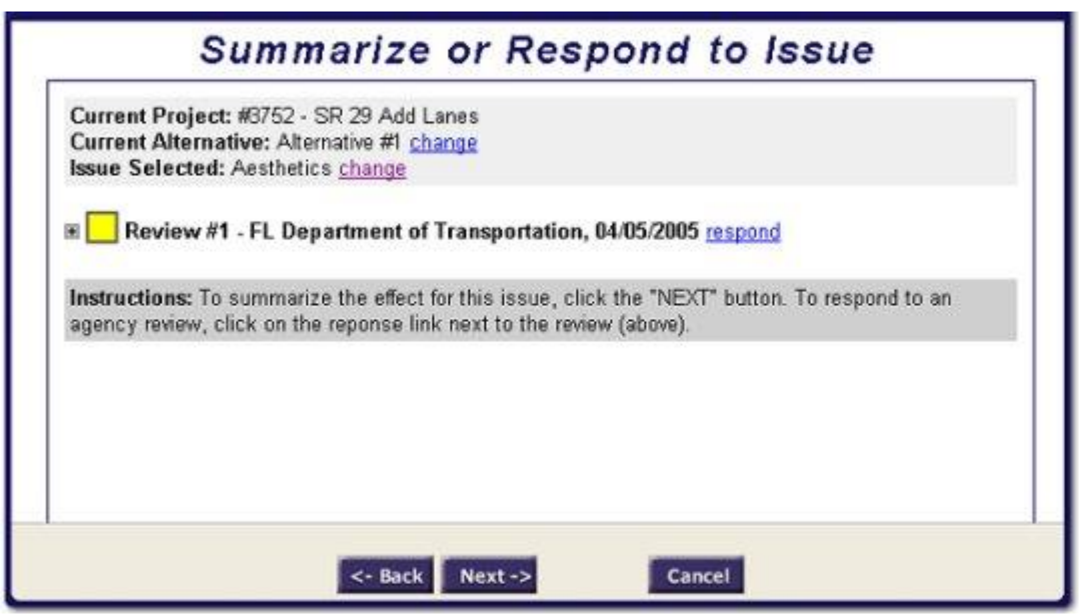
To select a different project to review, click on the option button next to “Review Another Project.” Then click “Next.” The form that opens lists all projects that have the status “ETAT Review Complete.” Select a project by clicking the option button next to the project name. Then click “Next.” The information for this project will then appear on the “What Would You Like To Do?” page of the wizard. Proceed with the review of this project by selecting a task on the “What Would You Like To Do?” page (shown above).



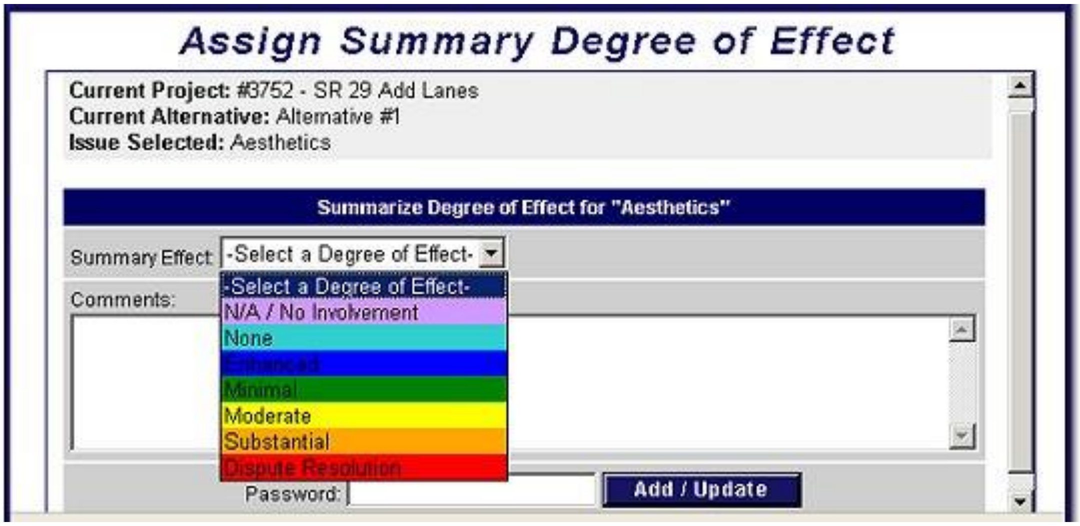
Summarize and Respond to Agency Reviews

The form shown below appears when you select “Summarize and Respond to Agency Reviews.” Select an issue by clicking on the option button next to the issue name, then click “Next.”

In the example shown below, Aesthetics was selected. To summarize or respond to another issue, click the “change” link beside “Issue Selected.” To summarize or respond to issues for a different project alternative, click the “change” link beside “Current Alternative.” To summarize the degree of effect for an issue, click the “Next” button at the bottom of the screen.

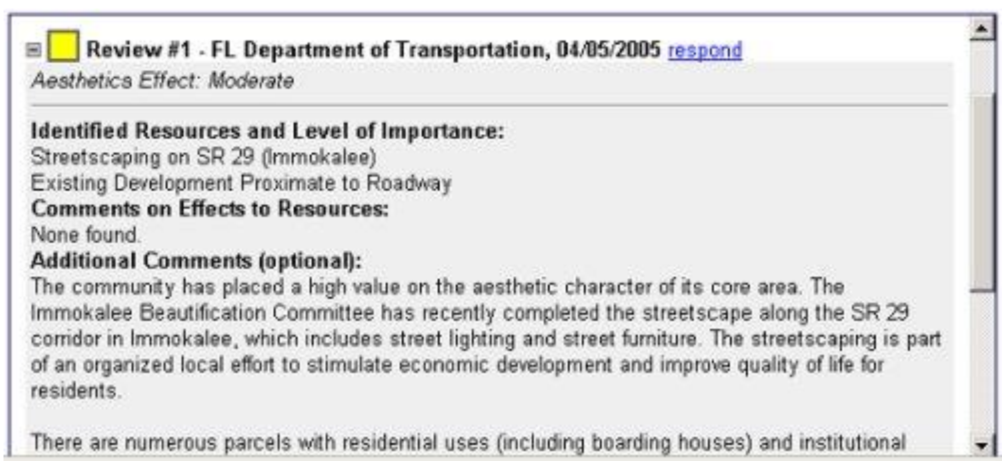


Select a degree of effect from the “Summary Effect” pull-down menu, then enter your agency password and click “Add/Update.”

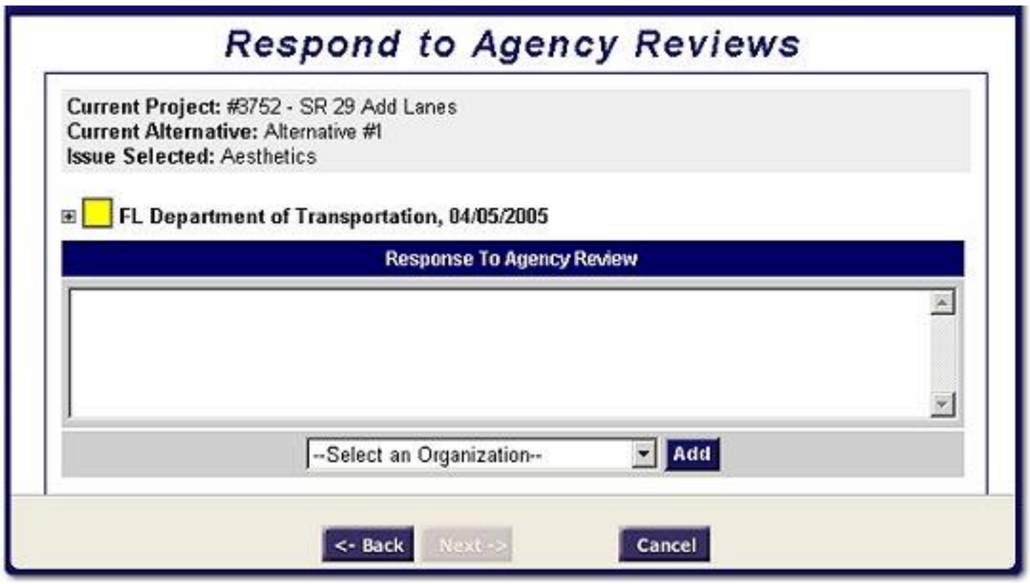


A message will appear indicating that comments for the issue have been summarized; and when you return to the “Select Issue to Review” screen, a blue check mark (✓) beside the issue name will indicate that the degree of effect has been summarized, as shown below. Select another issue, and follow the same procedure to summarize the degree of effect for that issue.

To view details of an agency’s response, including comments, click + next to the agency’s name. Use the "respond" link to reply to specific agency comments.

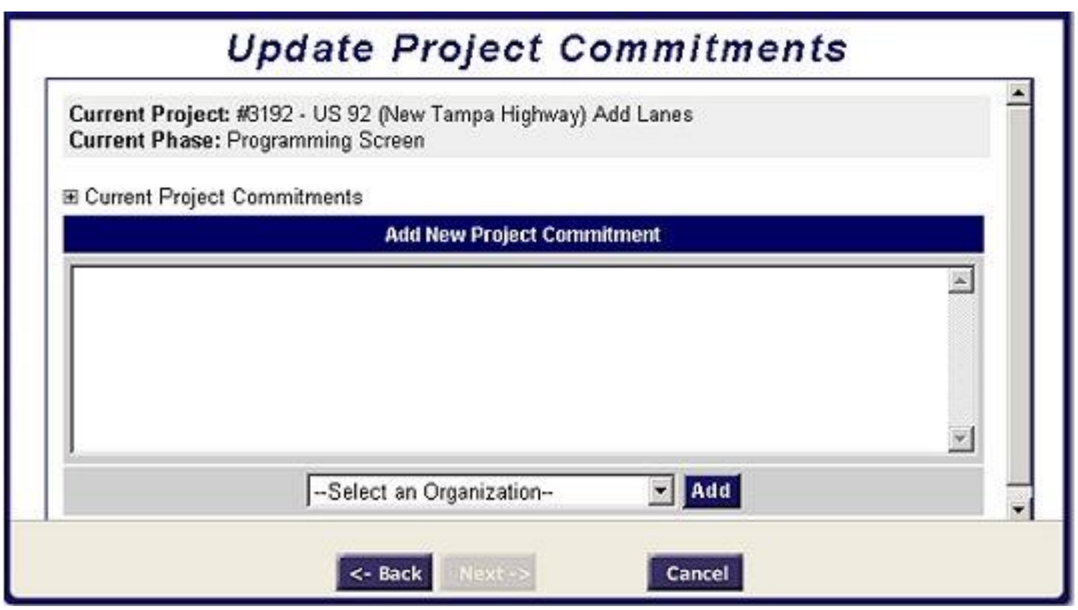


Enter the response to in the text box, then select your organization identification from the pull-down menu and click “Add.” The response can be typed directly in the text box, or text can be copied and pasted from another document.

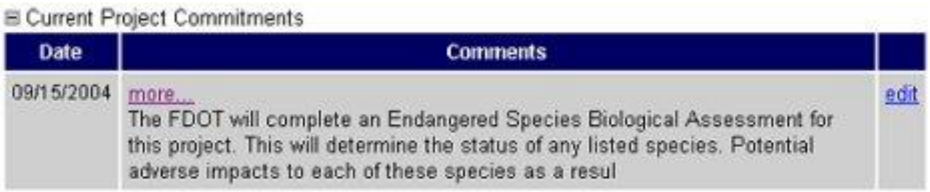


Update Project Commitments

The “Update Project Commitments” form is shown below. Click + next to “Current Project Commitments” to view the commitments, or use the text box to add a new project commitment. To add a new project commitment, type directly in the text box under “Add New Project Commitment” or cut and paste text from another document. Then select your agency identification from the pull-down menu and click “Add.”



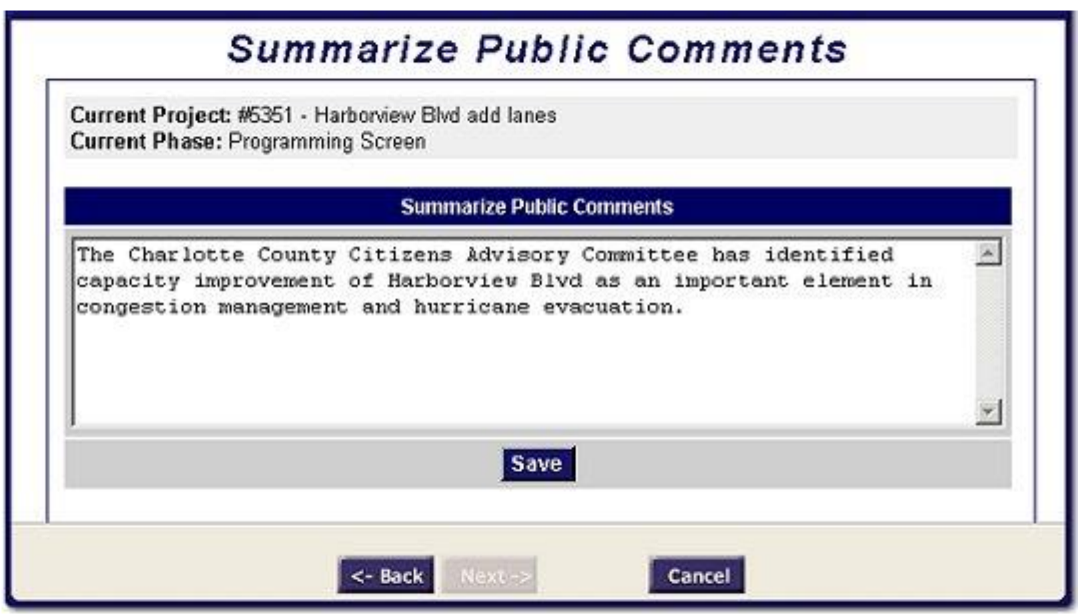
To update a current project commitment, click the “edit” link on the right-hand side of the screen, next to the description of the commitment. (The “more” link can be used to view the complete text of a comment.)



The form that opens when you click the “edit” link contains a text box with the full text of the project commitment. Make changes to the text by typing directly in the text box. Text can also be deleted. When finished, select your agency identification from the pull-down menu, then click “Update.” The commitment can be removed from the project record by clicking “Delete.” To cancel any changes made within the text box, click the “Cancel” button to the right of the “Delete” button.

Summarize Public Comments

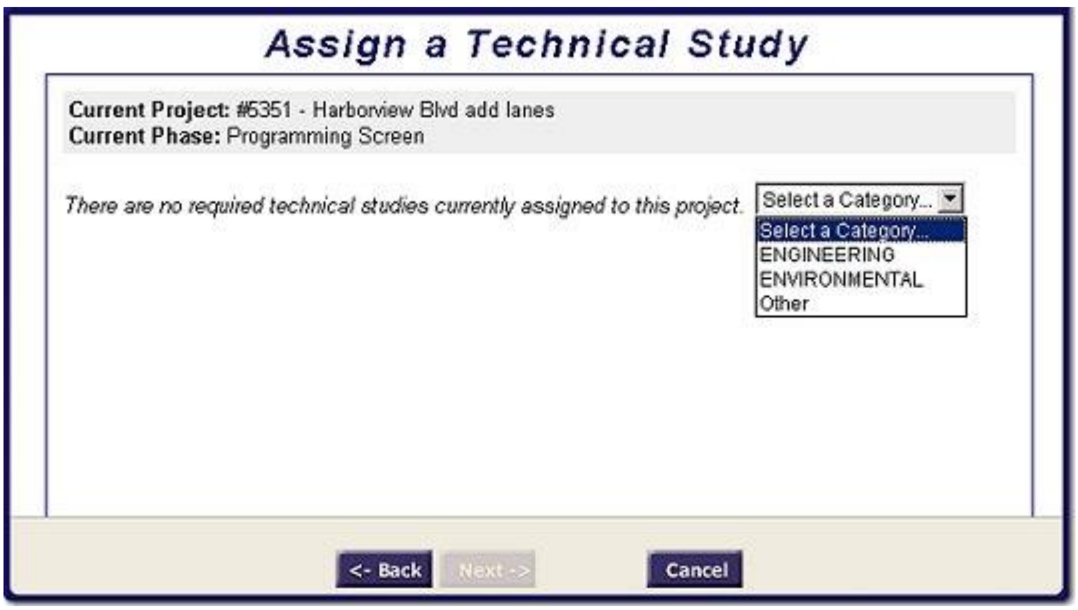
The form that opens when you select “Summarize Public Comments” is shown below. To add the public comment, as it appears on the screen, to the Programming Summary Report, click “Save.” Make changes to the comment by typing directly in the text box under “Summarize Public Comments.” Text can also be deleted. When finished, click “Save.”



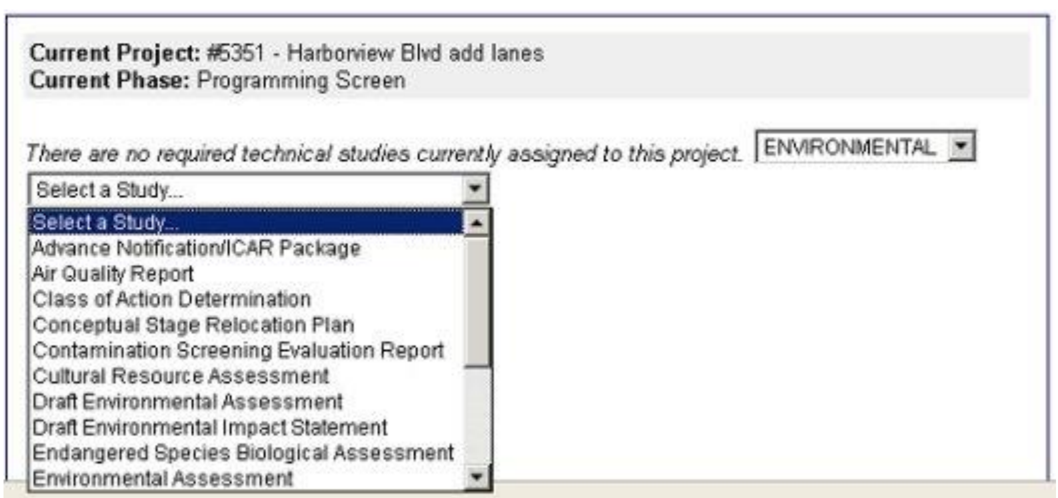
The screen that appears next indicates that the comments have been summarized. Click the “Next” button at the bottom of the screen to begin a new task.

Assign a Technical Study

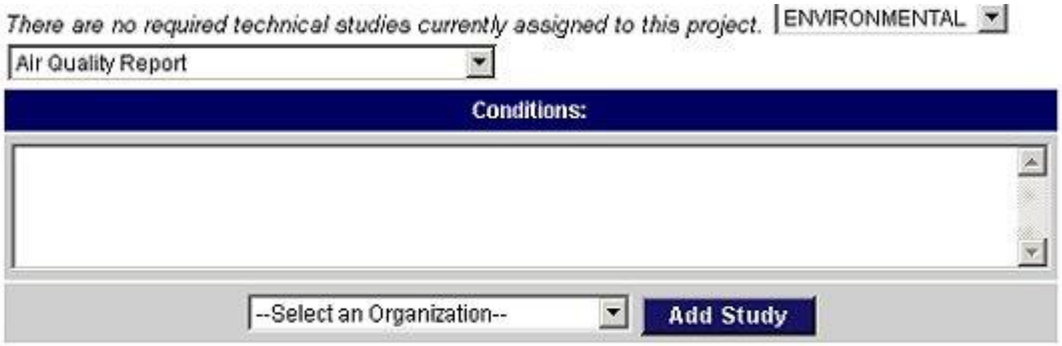
The form used to assign a technical study to a project is shown below. First, select a category from the pull-down menu.



In the example shown below, the “Environmental” category was selected. Next, select a study from the “Select a Study” pull-down menu.



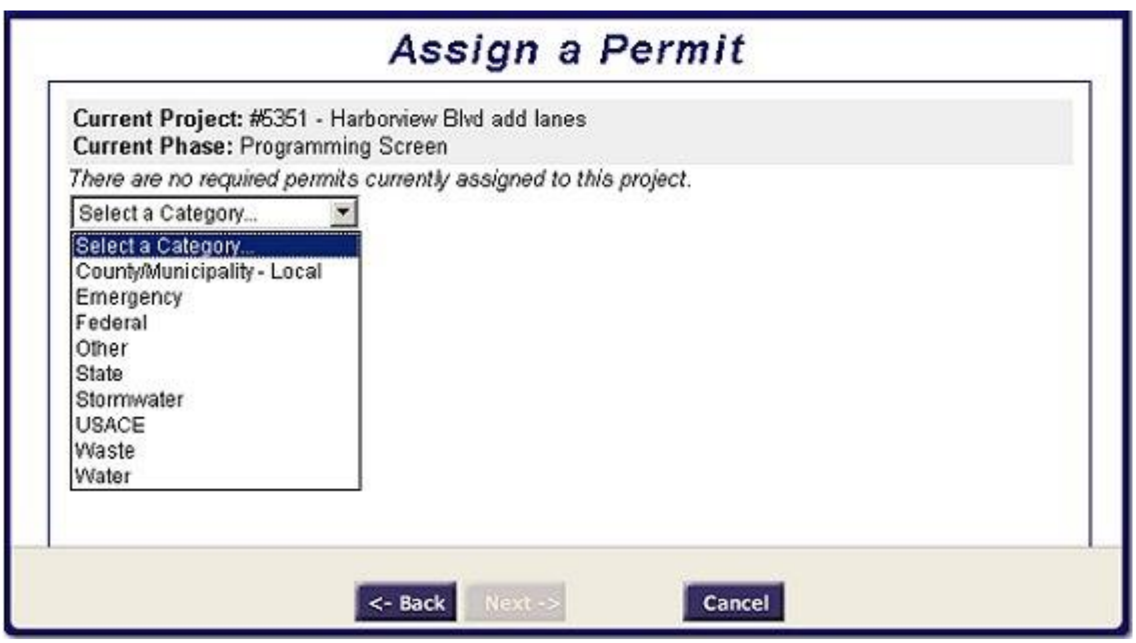
In the example shown below, “Air Quality Report” was selected. Enter the requirements for the study in the text box under “Conditions.” Then select your organization identification from the pull-down menu and click “Add Study.”



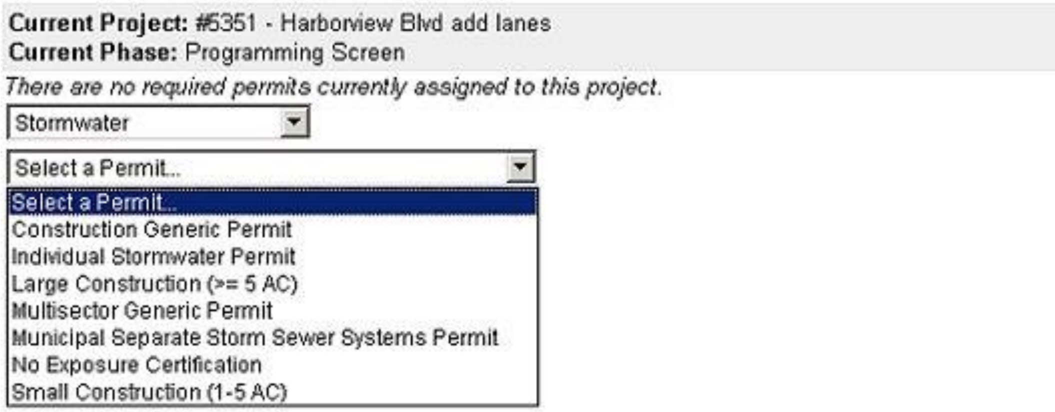
The next screen confirms that the technical study has been added to the project, and includes a function to assign additional technical studies to the project. To assign additional technical studies, click “More Technical Studies” and repeat the process described above. Click + next to “Assigned Technical Studies” at any time to see a list of all technical studies assigned to the project. When finished, click the “Next” button at the bottom of the screen to return to the “What Would You Like To Do?” page and select another task.

Assign a Permit

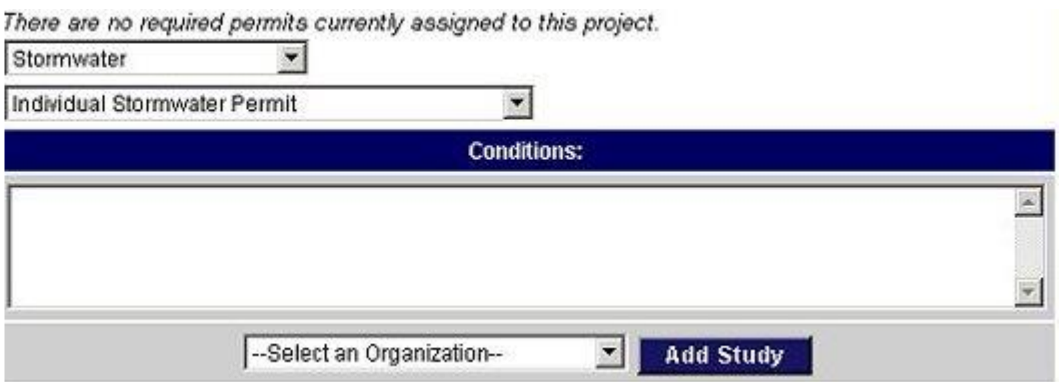
To assign a permit to a project, first click the option button next to “Assign a Permit” on the “What Would You Like To Do?” page, then select a permit from the “Select a Category” pull-down menu.



In the example shown below, the category “Stormwater” was selected. The next step is to select a permit from the “Select a Permit” pull-down menu.



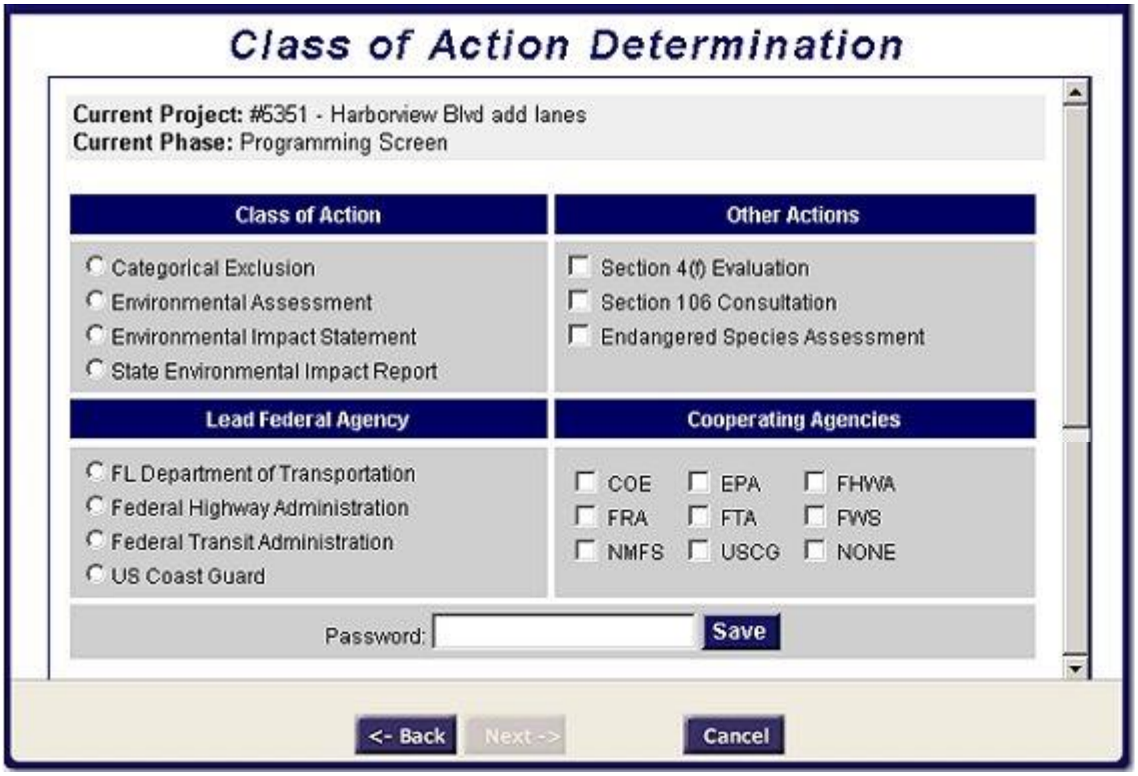
In the example shown below, “Individual Stormwater Permit” was selected. Enter the requirements for the permit in the text box under “Conditions.” Then select your organization identification from the pull-down menu and click “Add Permit.”



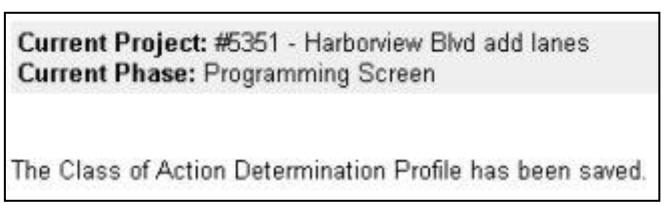
The next screen confirms that the permit has been added to the project, and includes a function to assign additional permits to the project. To assign additional permits, click “More Permits” and repeat the process described above. Click + next to “Assigned Permits” at any time to see a list of all permits assigned to the project. When finished, click the “Next” button at the bottom of the screen to return to the “What Would You Like To Do?” page and select another task.

Prepare Class of Action Determination

A Class of Action Determination can be prepared for a project by first selecting “Prepare Class of Action Determination” on the “What Would You Like To Do?” page. On the form that opens, select a Class of Action, other actions (if pertinent), the lead federal agency, and cooperating agencies (if pertinent). Then enter your EST password and click “Save.”

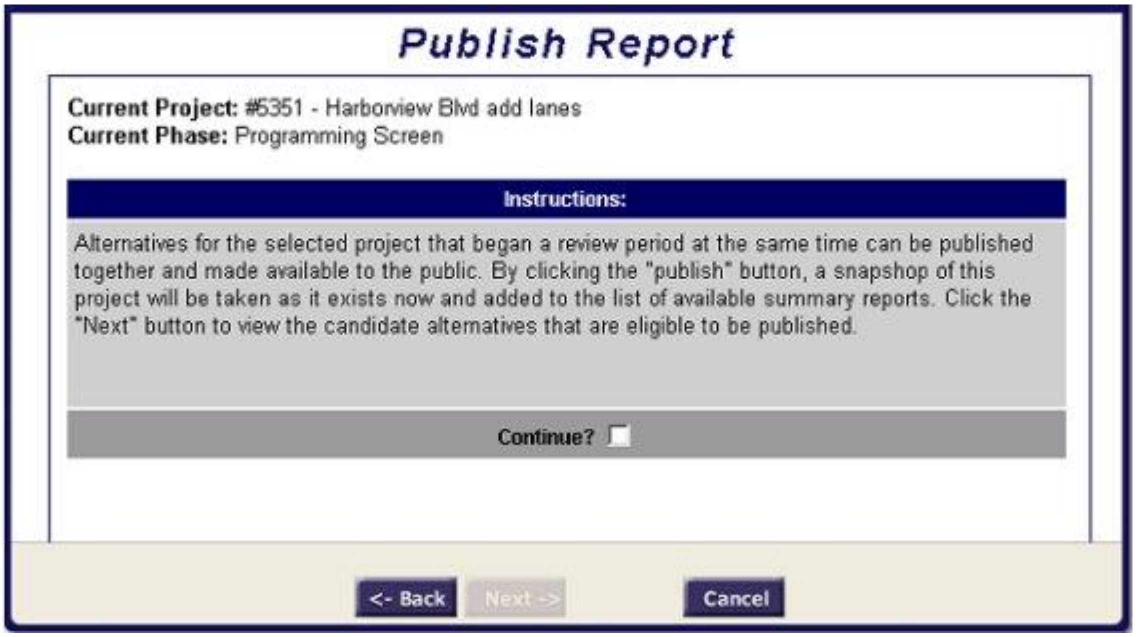


A message will appear, confirming that the Class of Action Determination has been saved. When finished, click the “Next” button at the bottom of the screen to return to the “What Would You Like To Do?” page.

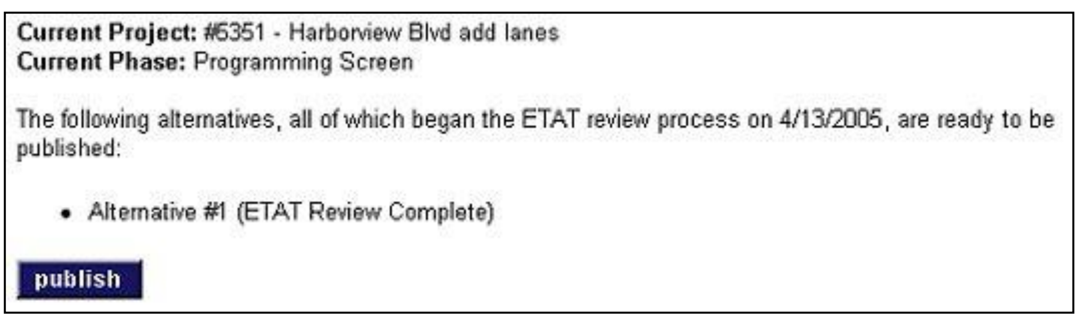


Publish

The last step involved in generating a summary report using the “Generate Summary Report” wizard is to make the report available to the ETAT and public. This is accomplished by first clicking the option button next to “Publish” on the “What Would You Like To Do?” page, then clicking “Next.” The form that opens includes information concerning the summary report that will be generated. Click the check box next to “Continue?”



The next screen lists the project alternatives for which a Programming Summary Report can be published. To continue, click “Publish.” The Programming Summary Report will then be added to the list of summary reports available in the EST, and can be accessed by the ETAT and the public.



3.3.4 Update ETDM Project (Updated 02/15/2015)

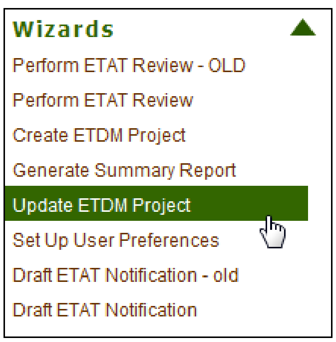
The **Update ETDM Project** wizard in the Environmental Screening Tool (EST) **Wizards** menu guides you through the process for updating a project record. The wizard uses the same forms found in the EST Tools menu, but with the form sections organized into tabs. Additionally, the wizard displays a series of dialog boxes that allow you to access forms for entering new project information (e.g., alternative description, segment details, participating/cooperating agencies).

Tip! For further information about the ETDM process, please see the ETDM Manual at http://www.dot.state.fl.us/emo/pubs/etdm/etdmmanual.shtm. For additional information of navigating a form, see the EST user handbook.

Accessing and Using the Update ETDM Project Wizard:

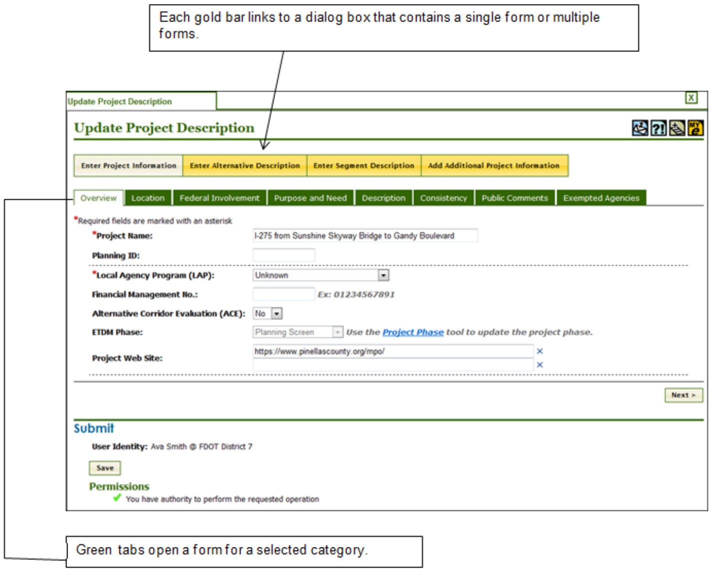
1. Select an **Active project** or group of projects from the project navigation bar.

2. On the **Wizards** menu, click **Update ETDM Project**.



The wizard opens, displaying the **Update Project Description** screen. On the screen you will see a series of gold bars that are divided into information categories. Each bar links to dialog boxes containing forms related to a category.

Note: By default, the wizard displays the dialog box for the category labeled **Enter Project Information**, which contains a group of tabs.



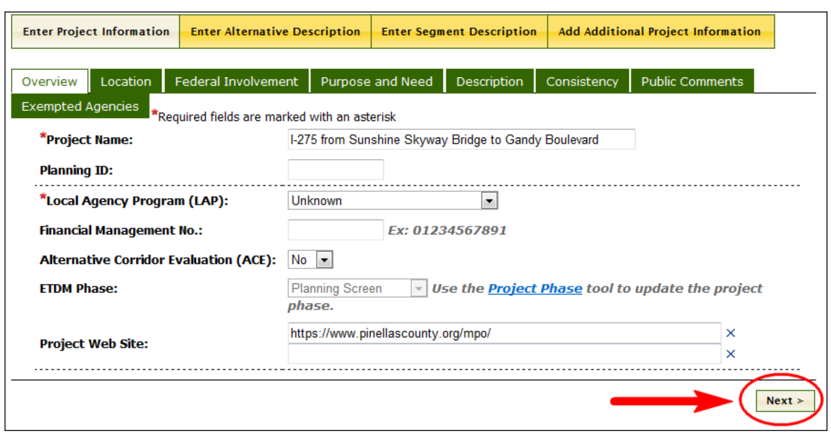
Note: Red asterisks (*) indicate required fields.

Navigating the Update ETDM Project Wizard

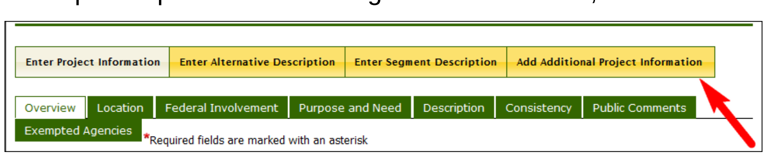
1. Open a dialog box by clicking on one of the gold bars at the top of the **Update Project Description** screen.

2. If there are a series of tabs within a dialog box, you can update the information by doing any of the following:

- To sequentially open each form, click the **Next** button located at the bottom of each screen.

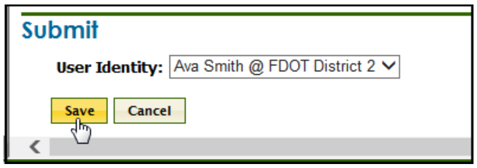


- To open a specific form or navigate between forms, click a tab.



3. After opening a form, make the updates by either typing the information or clicking the relevant option button.

Note: Look at the bottom of each form to see if there is an action button for saving, submitting, or sending information. Click the button to apply your changes.



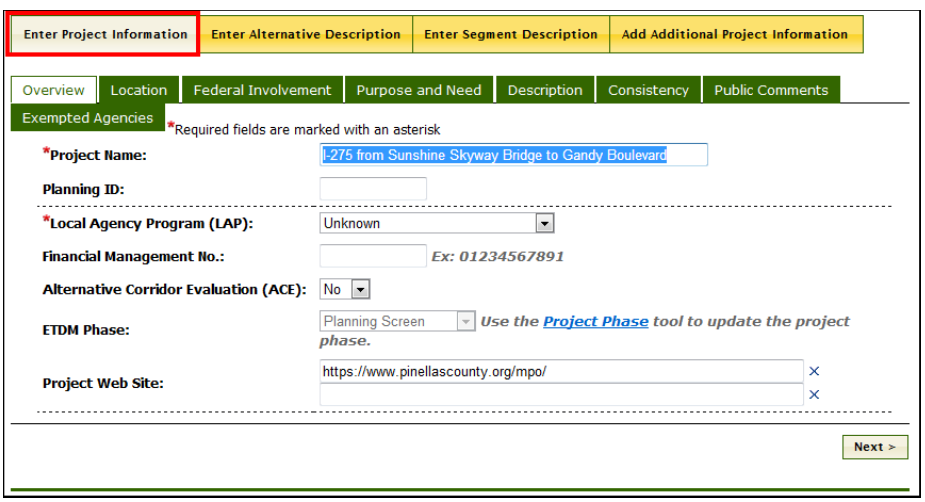
Entering Information

This section describes the type of information found under the following dialog box categories:

- Enter Project Information
- Enter Alternative Description
- Enter Segment Description
- Add Additional Project Information
- Advance Notification

Enter Project Information

1. Click the **Enter Project Information** tab.



Under this category you will find forms under the following tabs:

TAB	DESCRIPTION
Overview	Opens the form for updating the following: **Project Name**, **Planning ID**, indicating if the project is **LAP** or **ACE**, **Financial Management No.**, **ETDM Phase**, **Project Website**
Location	Opens the form for updating project location information**: Planning Organization**, **Counties**, **Beginning Location**, **Ending Location**

TAB	DESCRIPTION
Federal Involvement	Opens the form for selecting Federal Involvement/No Federal Involvement
Purpose and Need	Displays the Purpose and Need text box and comments
Description	Displays the Project Description text box and comments
Consistency	Displays a form for entering consistency information. ***Note:*** If you receive this screen, the section displaying response option buttons is no longer applicable. Please follow directions shown next to the **Planning Consistency Status** label.
Public Comments	Displays buttons for indicating if **Public Comments are available/not available**, along with a text box containing comments
Exempted Agencies	Allows you to add/remove agencies from the exemption list. Justification text boxes display current wording you can edit, or you can enter a justification for an agency added to the list.

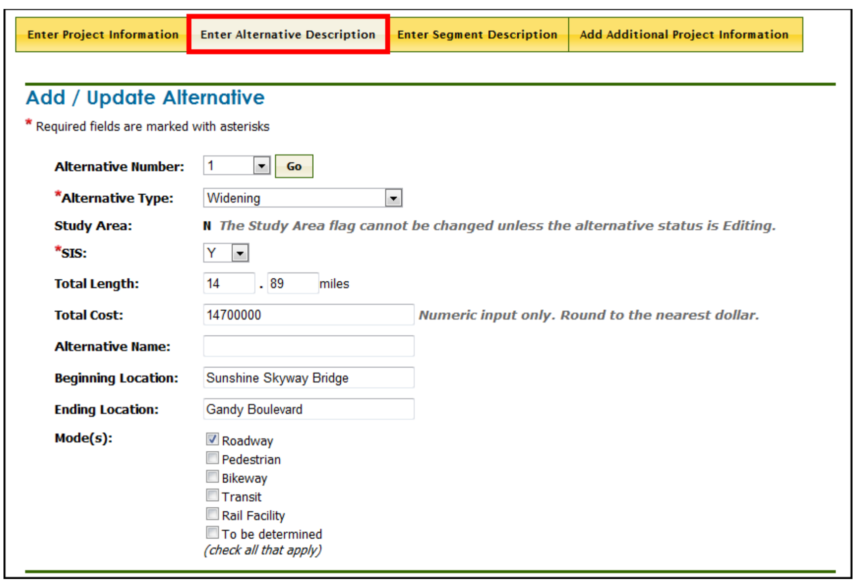
2. Click a tab to open the form.

3. Proceed through the form on the wizard by filling in the relevant information.

4. After you have entered your information, click the **Save** button located under the **Submit** header at the bottom of the screen.

Enter Alternative Description

1. Click **Enter Alternative Description**.



2. Enter or modify the relevant information.

3. Click **Submit Form**.

Enter Segment Description

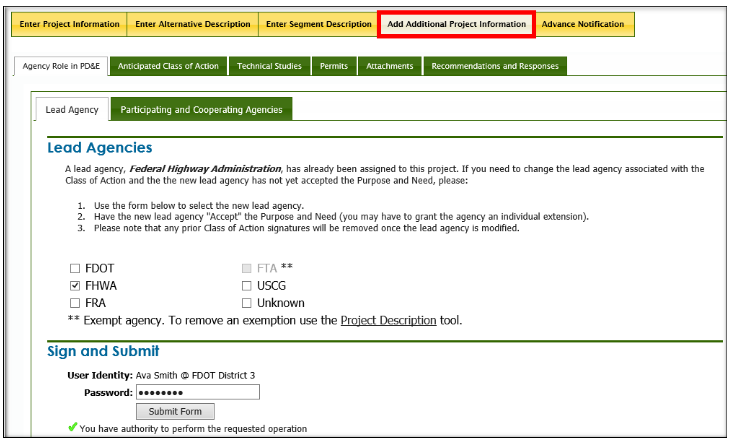
1. Click **Enter Segment Description**.

2. Enter or modify the relevant information.

3. Click **Submit Form**.

Add Additional Project Information

1. Click **Add Additional Project Information**.



The following table describes the group of tabs found under this category.

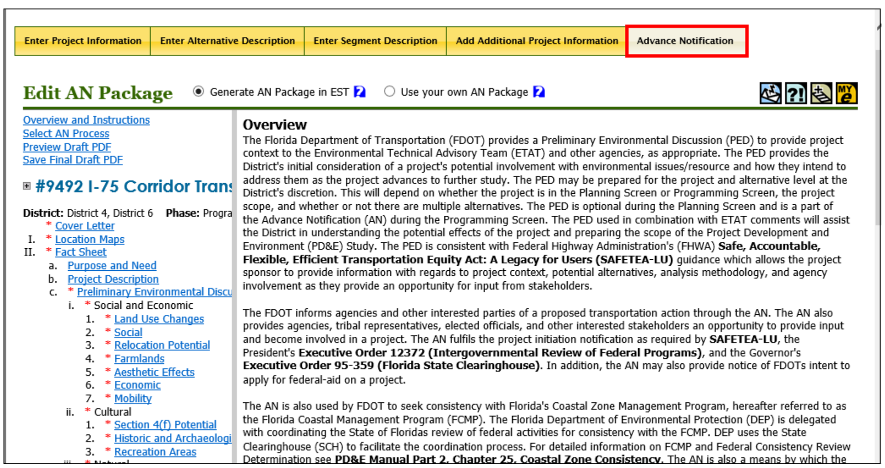
TAB		DESCRIPTION
Agency Role in PD&E Provides tabbed forms for adding the Lead Agency and for selecting Participating and Cooperating Agencies.		
	Lead Agency	Displays a list of agencies. Allows you to add or change a Lead Agency.
	Participating and Cooperating Agencies	Displays agencies that have been invited to act as cooperating and participating agencies. The form allows you to make changes and send recommendations.
Anticipated Class of Action		Displays the name of the Lead Agency and option buttons for selecting the anticipated Class of Action. A link is also provided that allows you to change the Lead Agency.
Technical Studies		Provides a search tool at the top of the page to help locate a study title. The form provides buttons for adding a study or creating and editing study conditions.
Permits		Provides a search tool at the top of the page to help locate a permit title. The form provides buttons for adding a permit or creating and editing permit information.

TAB	DESCRIPTION
Attachments	Displays a list of project documents that are currently attached to the project record. An upload tool allows you to attach additional documents.
Recommendations and Responses	Displays general project recommendations and allows you to add recommendations. A link for responding to agency reviews is also provided.

Advance Notification

The **Advance Notification** tab appears for projects that have completed a Planning Screen. You can use the form provided in the wizard to select an AN process and to create, edit, or save an Advance Notification (AN) package.

1. Click **Advance Notification**.



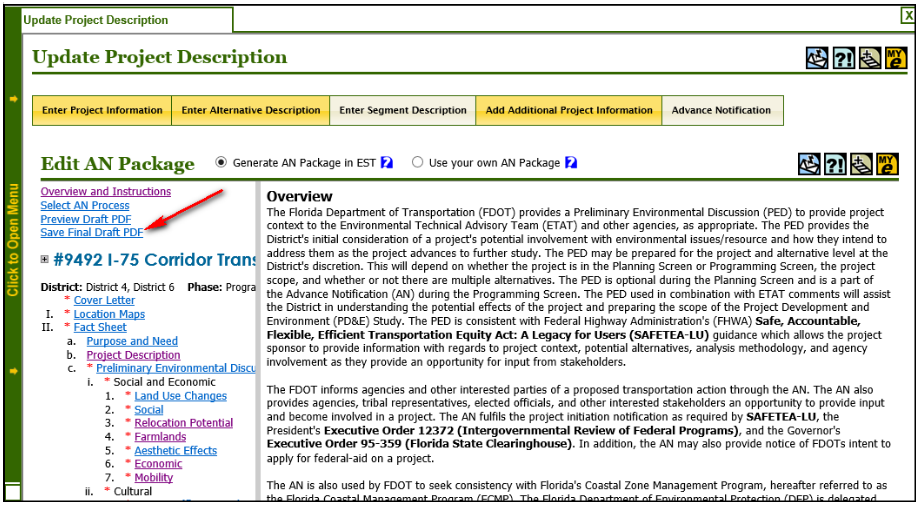
2. Click the appropriate option button to indicate one of the following:

- Click **Generate AN Package** in the EST if you will be using the **Edit AN Package** form to create the AN package. Go to Step 3 of these instructions.
- Click **Use Your Own AN Package** if the AN package has been created outside the EST. Use the upload tool to upload the AN package to the database.

3. Use the outline at the left of the form to complete each section of the AN Package. Further instructions will appear within each section.

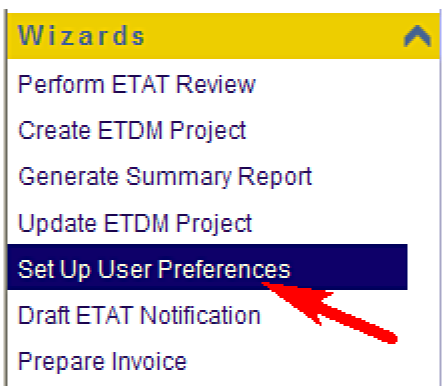
Note: A red asterisk, *, indicates that information needs to be entered in order for the section to be complete.

4. When the package is complete, generate the final draft AN Package PDF using the **Save Final Draft PDF** link.



3.3.5 Set Up User Preferences (Updated 01/06/2006)

The **Set Up User Preferences** wizard allows users to set up their **My ETDM** preferences. To use the **Set Up User Preferences** wizard, go to the **Wizards** menu and select **Set Up User Preferences**.



The **Set Up User Preferences** wizard includes sequential screens for setting up the following preferences:

- Select a start-up option
- Add mini-reports to My ETDM
- Choose My ETDM pages
- Configure EST maps
- Change notification settings
- Update contact information

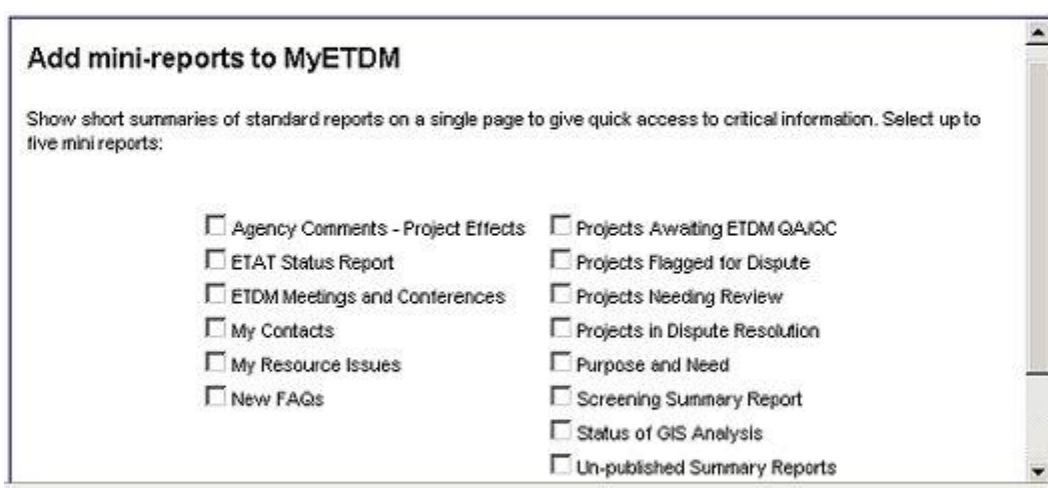
The preferences set up using the **Set Up User Preferences** wizard can be changed at any time by using the functions available under **Account Settings** on the main menu.

The first screen in the **Set Up User Preferences** wizard allows the user to select what will be displayed when they first log on to the EST. The two options are:

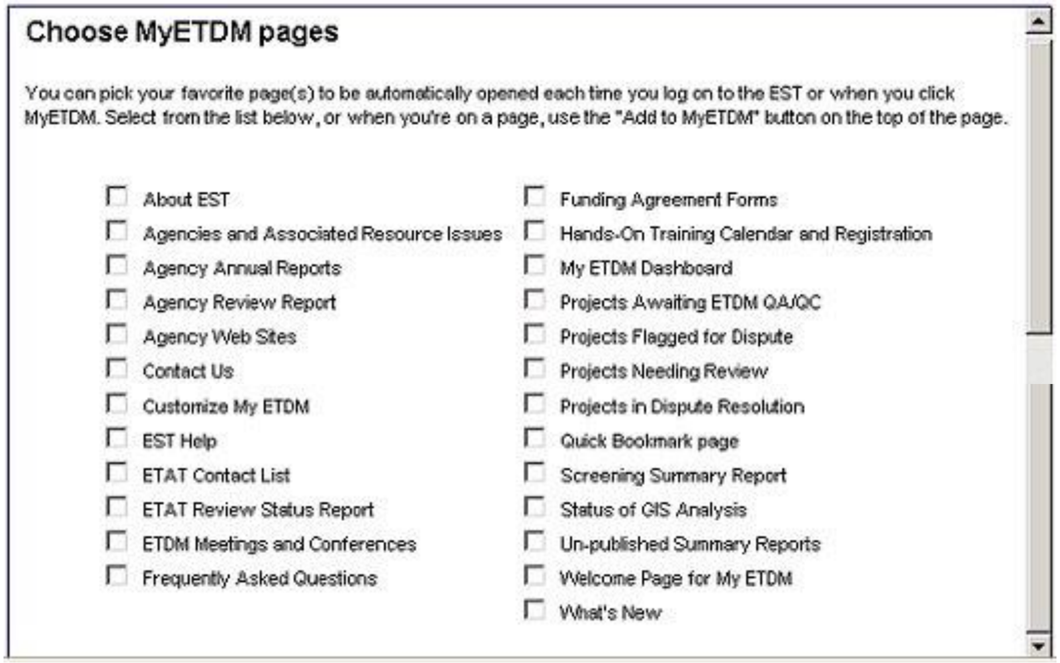
- **Restore history** (select this option if you want to return to the last page or pages that were open when you logged off the EST)
- **Load "MyETDM" pages** (select this option if you want the EST to load the pages designated as your "My ETDM" pages)

Click the option button next to the option you prefer. (The default option is "Restore history.") Then click **Next**.

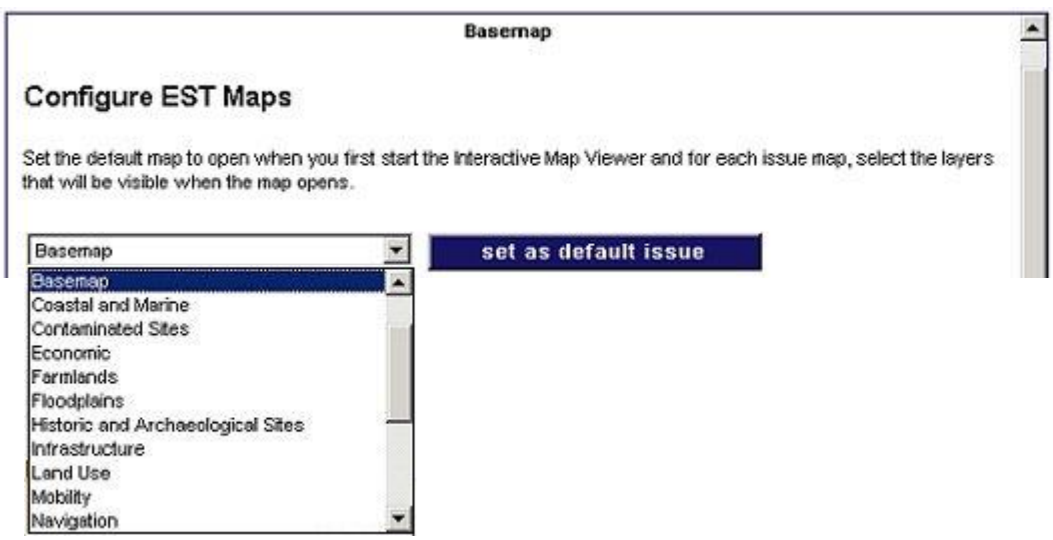
The second screen can be used to select mini-reports to be added to the user's My ETDM. Mini-reports are abbreviated versions of standard reports, and the mini-reports selected will be displayed on a single page when you log on to the EST. Select up to five mini-reports by clicking the check box next to the name of the mini-report. When finished, click the "Next" button at the bottom of the page.



The next screen is used to select My ETDM pages. Click on the check box next to the name of the page to select that page. There is no limit to the number of pages that can be selected. The pages selected will automatically open each time you log on to the EST. Each page will be represented by a tab at the top of the page (similar to a file folder in a filing cabinet). You can switch from page to page by clicking on the tabs. When finished, click the "Next" button at the bottom of the page.

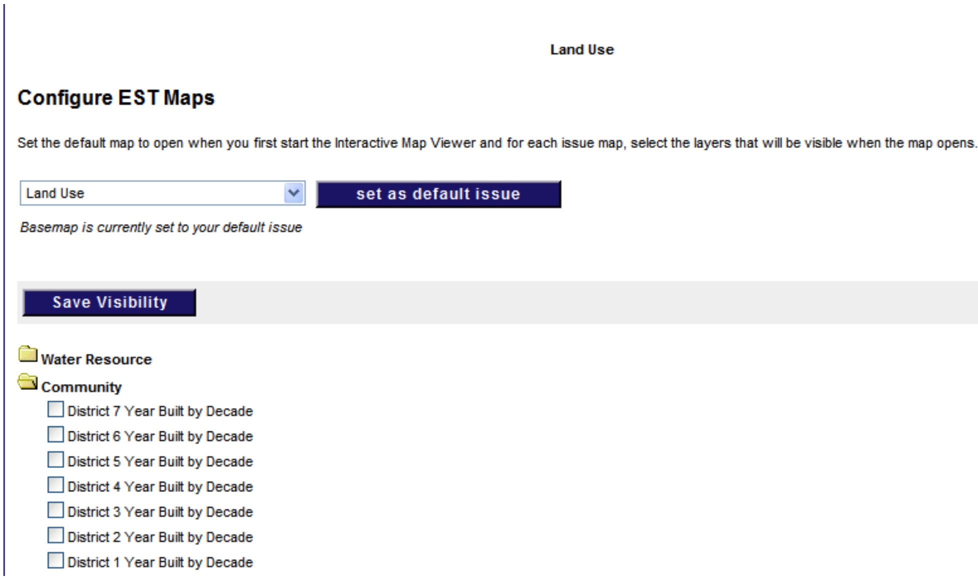


The next screen is used to select preferences for how maps are displayed. Use the drop-down menu to select the map to be displayed when you first start the Interactive Map Viewer. ("Basemap" is the default map.) Then click "set as default issue."



In the example shown below, Land Use was selected as the default map.

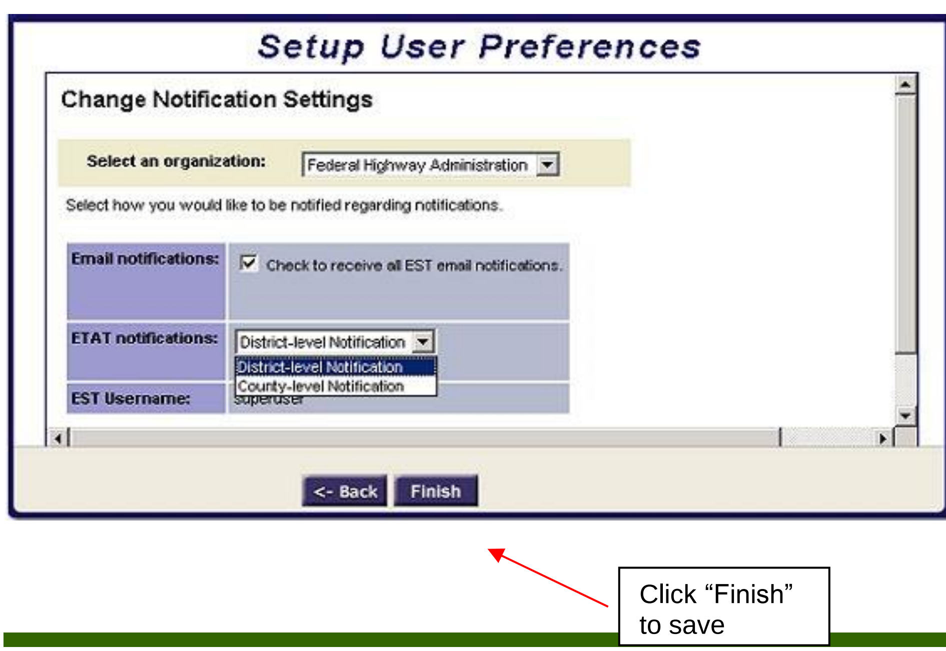
Preferences can also be set for data layers to be displayed on each issue map. First, click on the file folder icon for an issue.



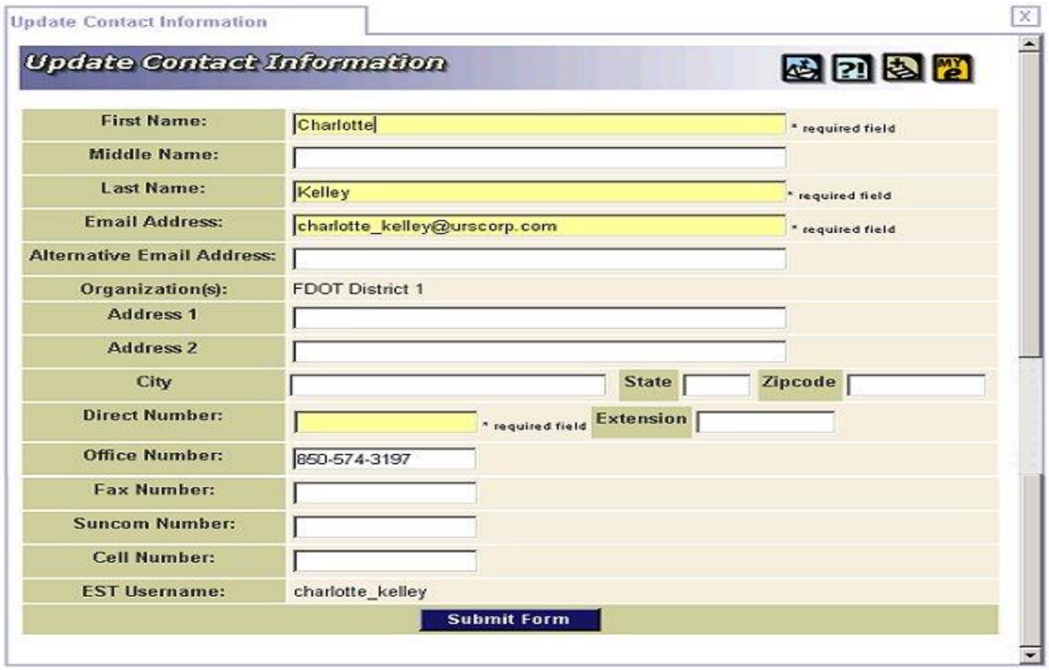
The selection will expand to display all the data layers associated with that issue. Next, click on the check box next to the data layer name. Repeat this process for as many issues as desired, and then click Save Visibility.

The “Change Notification Settings” screen is used to change the email notifications a user receives. By default, all users receive notices when the “What’s New” page is updated, when the system is experiencing difficulties or there will be planned outages, and when ETDM events are announced. If you do not want to receive these notifications, un-check the box next to “Check to receive all EST email notifications.”

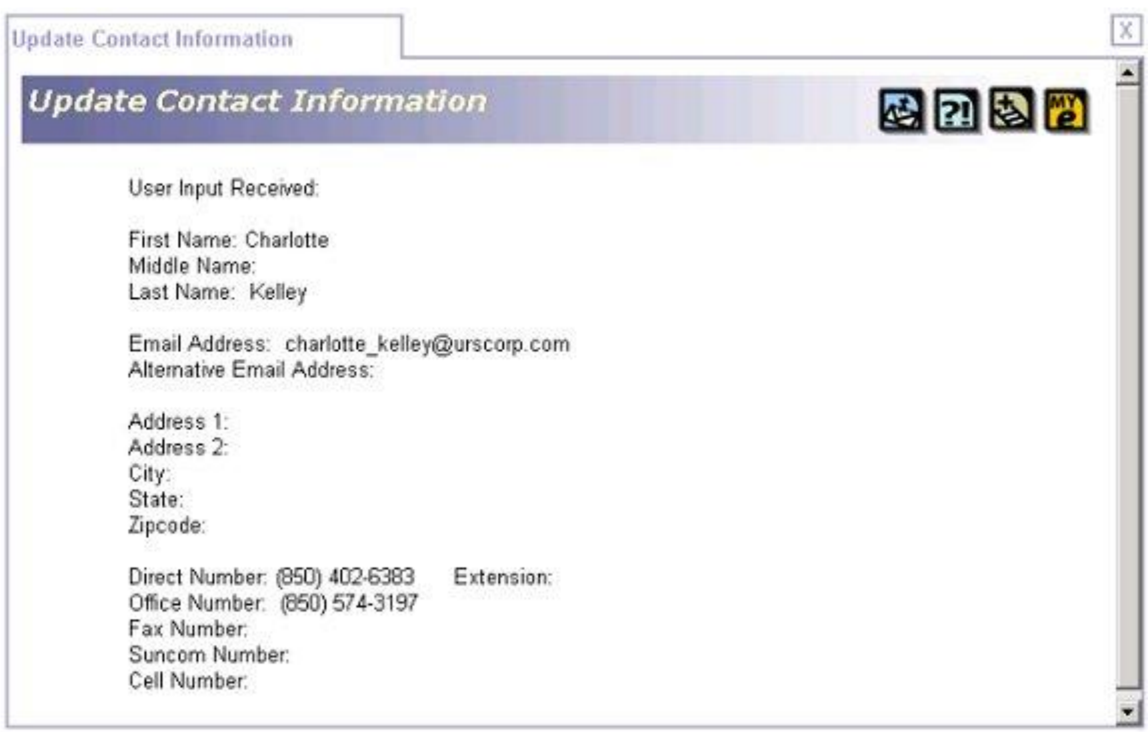
ETAT members can also specify whether they want to receive notices about projects by district or by county. Use the pull-down menu next to “ETAT notifications” to select either “District-level Notification” or “County-level Notification.”



Clicking "Finish" saves the user preferences and automatically opens the "Update Contact Information" form (shown below). Required fields are highlighted in yellow. Use the fields to update or add information to your contact profile. When finished, click "Submit Form."



The next screen is a confirmation of the contact information provided. Click the blue "X" in the upper right-hand corner of the screen to close this screen and return to the Welcome page.



3.3.6 Draft ETAT Notification (Updated 01/15/2015)

The **Draft ETAT Notification** function in the Environmental Screening Tool (EST) **Wizards** menu enables authorized users to configure email notifications to inform Environmental Technical Advisory Team (ETAT) members and other relevant users of the following:

- Review events
- Advance Notification (AN) package reviews

The **Draft ETAT Notification** feature opens a template that guides you through the ETAT Notification setup. After the Draft ETAT Notification email has been configured and saved, the EST automatically distributes the email when you update the project status to ETAT Review and AN Review.

The following table displays the review type selections and the email notification templates that display.

Table 1: Review Type and Notification

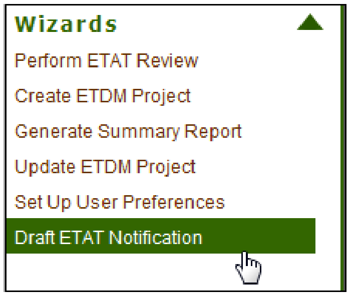
Review Type	Notification to Recipients	
	EST Access	Public Access
Planning	√	
Programming Screen with AN	√	√
Programming Screen **without** AN	√	
AN Review	√	√

3.3.6.1 Accessing the Draft ETAT Notification Wizard

1. Select a project from the **Active project** list.

Note: You can use the default project that appears in the **Active project** box, select a project from your **Saved Searches** or **Project History** lists, or you can click the **Advanced Search** link to select another project. See the Navigation chapter of the EST Handbook for information on using the **Project Navigation Bar**.

2. On the **Wizards** menu, point to and click **Draft ETAT Notification**.

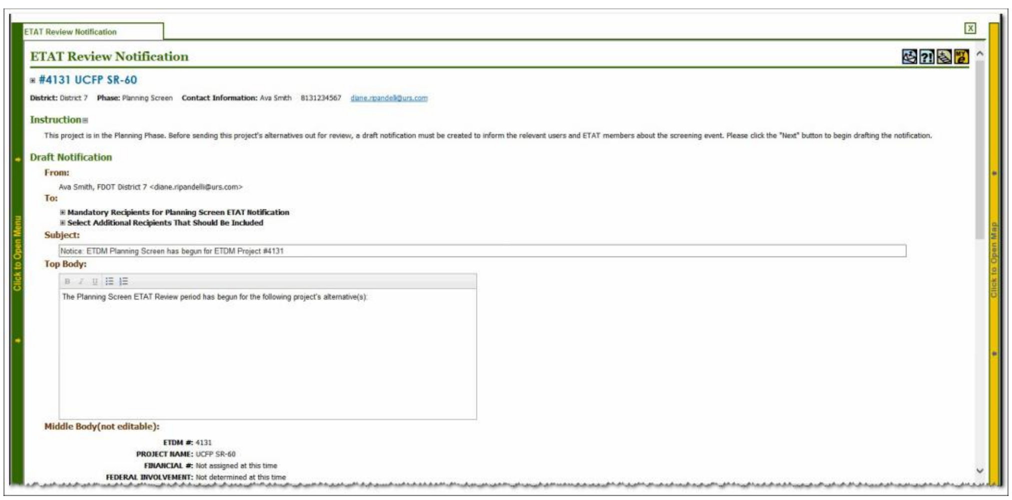


3. The window that opens next depends upon the selected project's phase (Planning or Programming). The sections that follow describe the process for drafting ETAT notifications for the following:

- Planning Screen
- Programming Screen

3.3.6.2 Draft ETAT Notification for Planning Screen

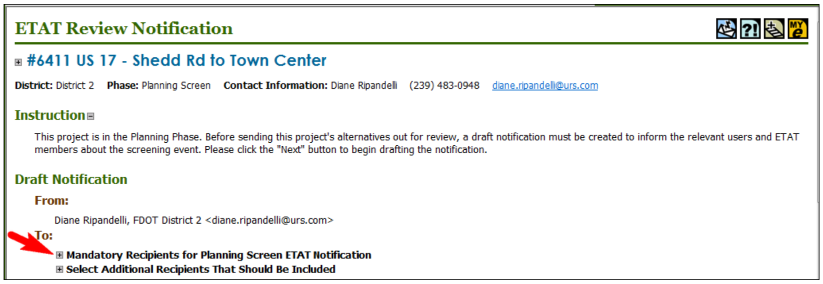
After clicking the **Draft ETAT Notification** link on the EST **Wizards** menu, the **ETAT Review Notification** screen opens and displays the email template. For projects in the Planning Screen, the template for the email notification displays as shown in the following illustration:



3.3.6.2.1 Viewing and Selecting Recipients

The Draft ETAT Notification page lists two types of recipients who will receive the Planning Screen notification: **Mandatory Recipients** and **Additional Recipients**. Mandatory recipients are displayed in a read-only format and cannot be changed. However, the list of additional recipients can be modified to add or remove recipients from the list.

1. To view the list of mandatory recipients, click the plus sign, ⊞, beside **Mandatory Recipients for Planning Screen ETAT Notification** to expand the list.


ETAT Review Notification

#6411 US 17 - Shedd Rd to Town Center

District: District 2 Phase: Planning Screen Contact Information: Diane Ripandelli (239) 483-0948 diane.ripandelli@urs.com

Instruction

This project is in the Planning Phase. Before sending this project's alternatives out for review, a draft notification must be created to inform the relevant users and ETAT members about the screening event. Please click the "Next" button to begin drafting the notification.

Draft Notification

From:

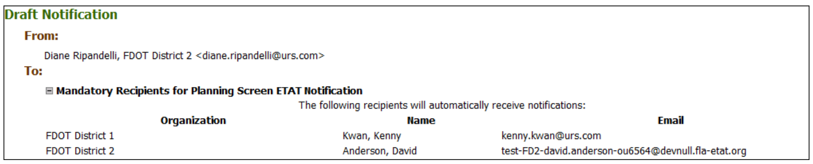
Diane Ripandelli, FDOT District 2 <diane.ripandelli@urs.com>

To:

Mandatory Recipients for Planning Screen ETAT Notification

Select Additional Recipients That Should Be Included

The list displays in a read-only format.


Draft Notification

From:

Diane Ripandelli, FDOT District 2 <diane.ripandelli@urs.com>

To:

Mandatory Recipients for Planning Screen ETAT Notification

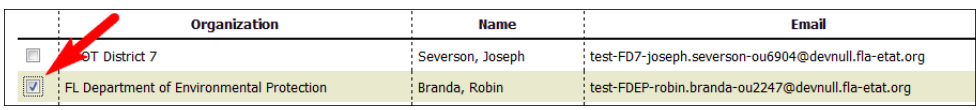
The following recipients will automatically receive notifications:

Organization	Name	Email
FDOT District 1	Kwan, Kenny	kenny.kwan@urs.com
FDOT District 2	Anderson, David	test-FD2-david.anderson-ou6564@devnull.fla-etat.org

Tip! Click the minus sign, , to collapse the list.

2. To add recipients, click the plus sign, , beside **Select Additional Recipients** and then click the check box for the name you want to include as a recipient.

Note: The names shown in the **Additional Recipients** list are populated from your personal contact list that you created with the **My Contact List** feature in the EST.



	Organization	Name	Email
	OT District 7	Severson, Joseph	test-FD7-joseph.severson-ou6904@devnull.fla-etat.org
	FL Department of Environmental Protection	Branda, Robin	test-FDEP-robin.branda-ou2247@devnull.fla-etat.org

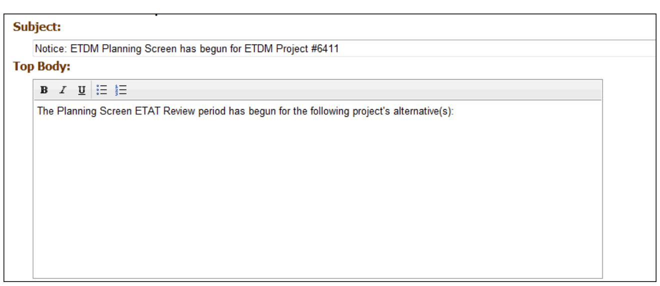
Tip! To add to or change your contact list, click the **My Contact List** link to open the form.

3.3.6.2.2 Viewing and Editing the Email Content

The notification header and top body displays the following:

- **Subject Line**: Displays the Planning Screen notification message and project number
- **Top Body** – Displays a text box for adding information about the review, such as a list of the alternatives to be reviewed.

Edits to the **Subject** line or **Top Body** can be made by typing the information into the box.


Subject:

Notice: ETDM Planning Screen has begun for ETDM Project #6411

Top Body:

The Planning Screen ETAT Review period has begun for the following project's alternative(s):

Additional information about the project is shown in the **Middle Body**, including details about the review dates and project contact information:

- **Review Start** (date)
- **Review End** (date)
- **ETDM Coordinator** contact information
- **Project Manager** contact information

Middle Body(not editable):

ETDM #:	6411
PROJECT NAME:	US 17 - Shedd Rd to Town Center
FINANCIAL #:	Not assigned at this time
FEDERAL INVOLVEMENT:	Federal Funding
ACE PROJECT:	Y
ALTERNATIVES:	1
MODES:	Roadway
SIS:	N
DISTRICT:	2
COUNTY:	Clay
PLANNING ORGANIZATION:	FDOT District 2
SCREEN:	Planning Screen
REVIEW START:	Monday, 10/17/2005
REVIEW END:	Thursday, 12/8/2005
ETDM COORDINATOR:	Don Dankert (800) 749-2967, ext. 7791 test-FD2-donald.dankert-ou44@devnull.fla-etat.org Kenny Kwan 8504026330 kenny.kwan@urs.com
PROJECT MANAGER:	None assigned at this time
LEAD AGENCY:	FHWA (proposed)
CLASS OF ACTION (COA):	Not determined at this time

Note: This section of the notification is in a read-only view that is automatically generated by the system.

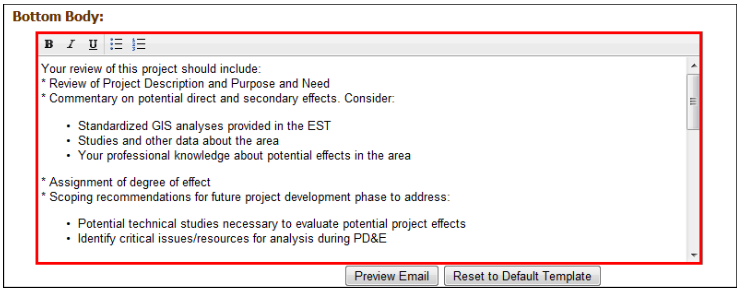
Additional **Middle Body** information includes the following content:

- Review period start and end dates
- Review period duration
- Water Management District assigned to review project
- Exempted Agencies

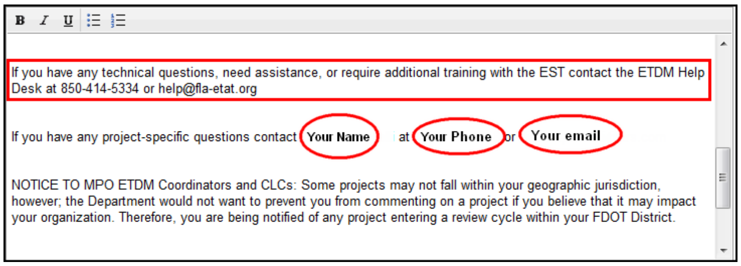
```
=====================================================================
The review period starts today [[START_DATE]], and will end in [[REVIEW_DURATION]], on [[END_DATE]].

=====================================================================
The following Water Management District(s) should review this project:

SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT

=====================================================================
The following agencies have been identified as potentially exempted from this project screening event. These agencies should
participate in the review screening at their own discretion.

Federal Transit Administration

=====================================================================
```

The **Bottom Body** of the email describes the recipients' review tasks, along with links to reference and contact information.

- Use the box scroll bar to review the information provided in the text box.



- Review the contact information located at the conclusion of the message to verify it is accurate.

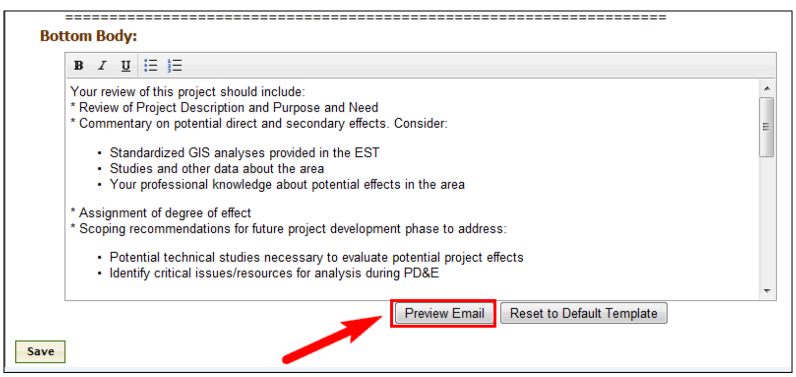


- Make any changes by typing—or copying and pasting—your edits directly into the text box. The formatting box becomes active after you click on the text box.

3.3.6.2.3 Previewing and Saving an Email

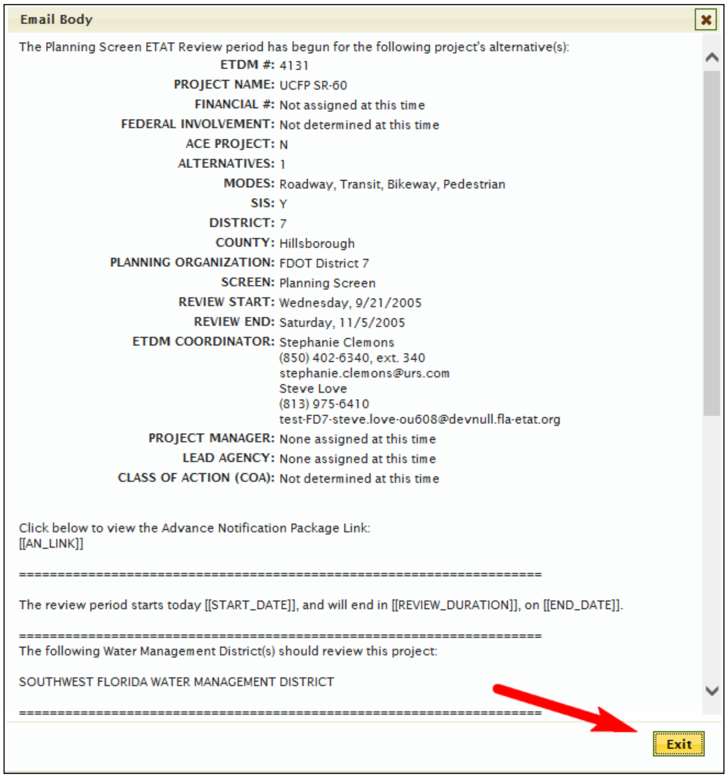
After you have completed the setup of the Draft ETAT Review Notification, you can review the email contents by doing the following:

1. Click **Preview Email**.



The **Email Body** screen displays, allowing you to view the email in the format that will be displayed for the recipients.

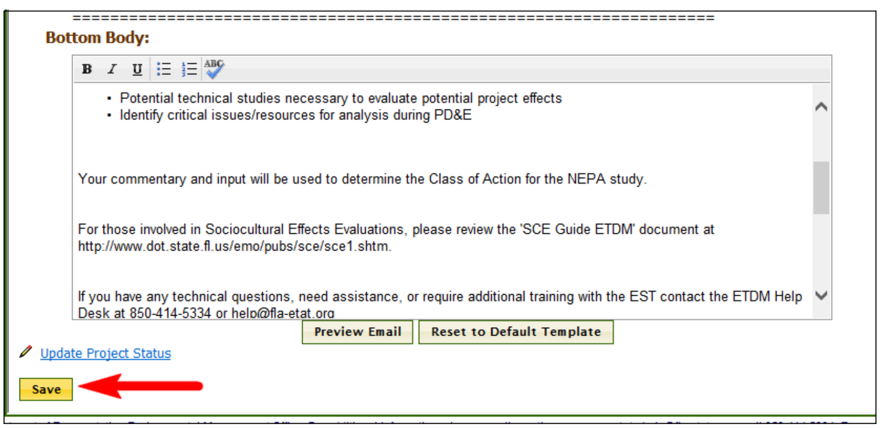
2. Click **Exit**.



The screen returns you to editing mode, where you can make additional changes, if needed.

Tip! To erase email text and return to the default email template, click the **Reset Default Template** button.

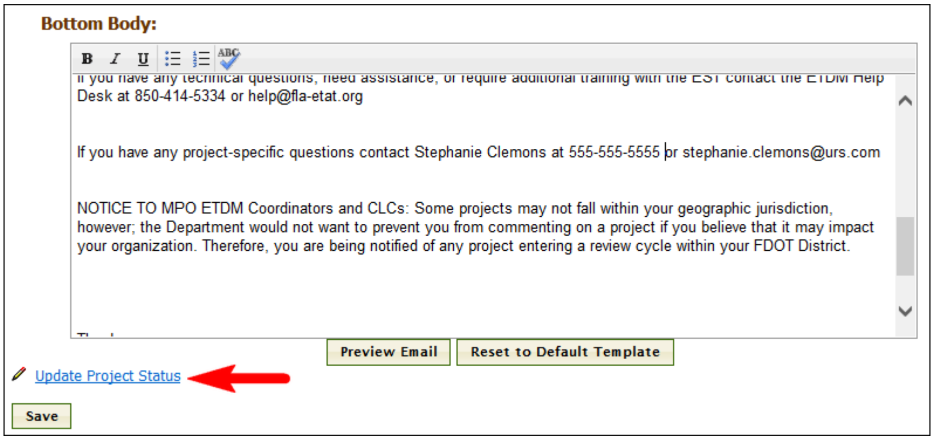
3. Click **Save**.



3.3.6.2.4 Updating the Project Status

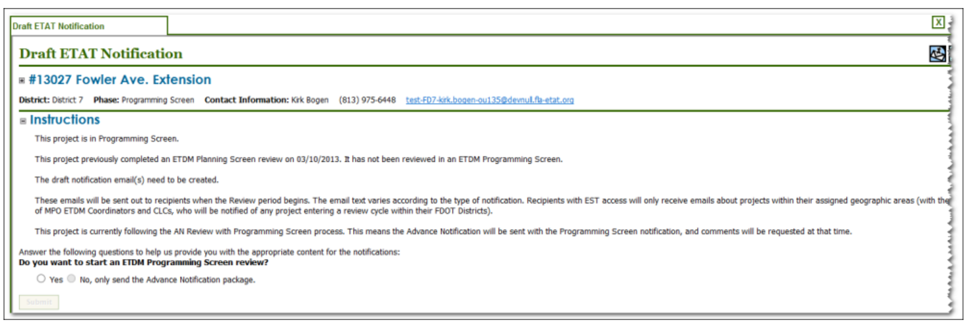
The **Draft ETAT Notification** tool provides easy access to the **Update Project Status** form, where you can move an alternative's status to **ETAT Review**.

Tip! See the Update Project Status section of the EST User Handbook for steps on using this feature.



3.3.6.3 Draft ETAT Notification for Programming Screen

After clicking the **Draft ETAT Notification** link on the EST **Wizards** menu, the **ETAT Review Notification** screen opens and displays the form for setting up the type of review, as shown in the following illustration:

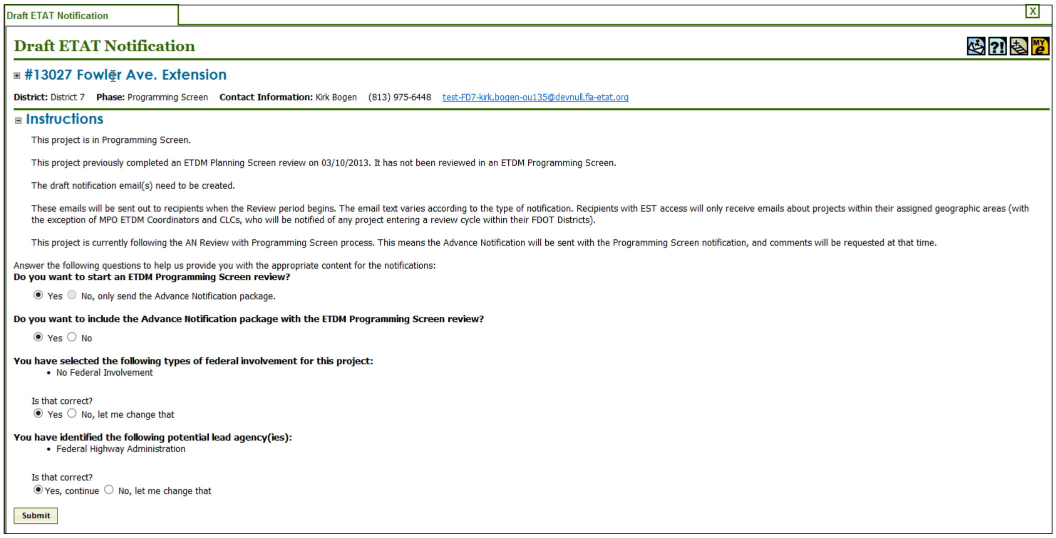


You will use the **Draft ETAT Notification** feature to inform ETAT reviewers and other recipients involved with a project's ETDM Programming Screen. The default screen displays a form that guides you through the process of selecting the type of review and the content provided in the email notification. The responses you select on the form determine the following:

- The type of notification recipients (EST users who have access to the secure site and public access users who are outside of the secure EST site)
- If the notification initiates a Programming Screen
- How the Advance Notification package will be distributed (attached to a Programming Screen notification or separate as a stand-alone document)

3.3.6.3.1 Selecting the Notification Content

When you open the **Draft ETAT Notification** page for a Programming Screen project, you will be presented with a series of questions that will determine the email text content, which is based on the type of review, AN process, and recipients.



Depending on the project's review status, the **Draft ETAT Notification** page provides you the following options:

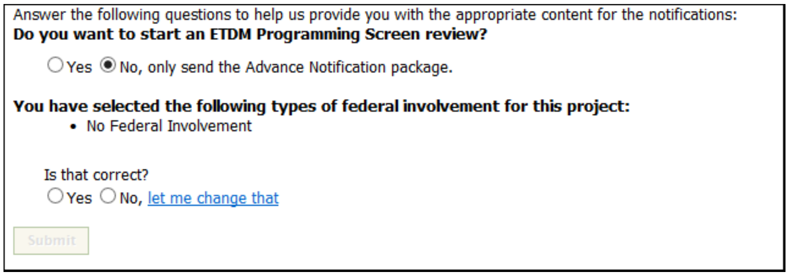
- *If this is the first time the project is going through an ETDM Programming Screen review* — You can click the **Yes** option to begin the ETDM Programming Screen and then choose to do one of the following:
  - Include the Advance Notification package with the review.
  - Start the review without the Advance Notification package (i.e., AN package will be sent separately from the ETDM Programming Screen review).
- *If the project has previously completed an ETDM Programming Screen review* — You can then choose one of the following actions:
  - Start another ETDM Programming Screen review
  - Send only the Advance Notification package

As you proceed through the AN process selection, prompts will appear according to your response in the preceding question. The steps shown in this section provide a guide to the sequence of prompts that appear on the page.

1. The first prompt asks if this notification will **start an ETDM Programming Screen review**. Do one of the following:
   - Click **Yes** to indicate the notification will ***begin the ETDM Programming Screen review***.
   - Click **No** to indicate the notification will ***only distribute the Advance Notification package***.

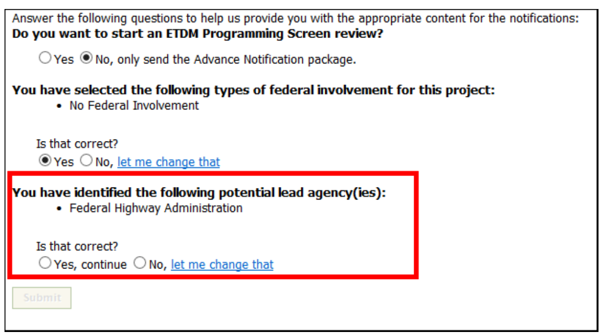
   Note: The **No** option will be grayed out if the project has never been through a Programming Screen review.
2. The prompt for confirming the **types of federal involvement** appears. Do one of the following:
   - Click **Yes** to confirm the type of federal involvement shown on the screen.

- Click **No** if the type of federal involvement does not correspond to what appears on the screen, then click the **let me change that** link to open the form where you can update the federal involvement information.



3. The form will further prompt you to confirm the **potential lead agency(ies**) that has been identified for the project. Do one of the following:

- Click **Yes**, continue to confirm that the names under the list of **potential lead agency(ies)** are correct.
- Click **No** if the list needs to be updated, then click the **let me change that** link, which will display the form where you can enter the updated information.

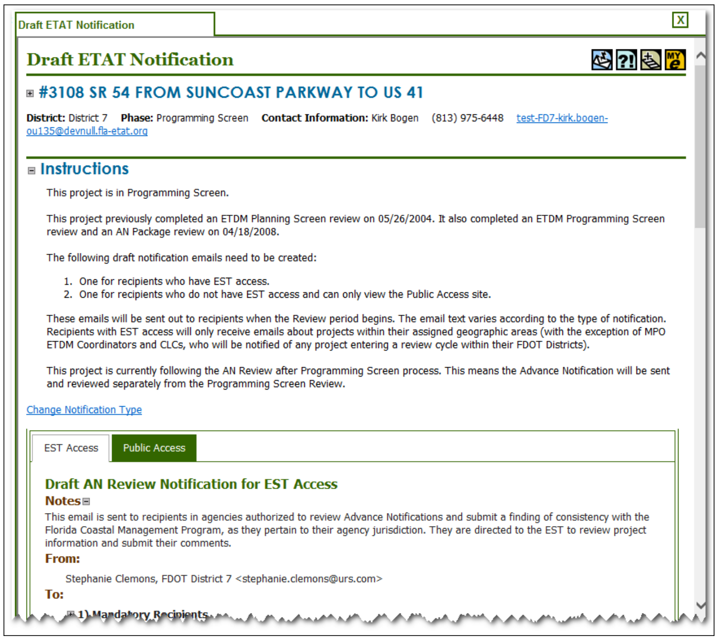


After entering your responses to the prompts, the screen displays the **Submit** button.

4. Click **Submit**.

After completing the notification form, the EST displays the email template screen based on the responses selected on the notification questionnaire. The screen displays the following:

- **Instructions** – This section displays the type of review, review history, and type of notification needed.
- **Change Notification Type** – This link returns you to the form where you can make changes.
- **Draft Notification** – Depending on the responses selected on the form, the screen will display the notification type along with tabs for **EST Access** and **Public Access**, or for only the EST Access screen. (Refer to the Review Type and Notification table).



Note: The **Draft ETAT Notification** page displays your saved notification responses for 7 days. If you return to the form after 7 days, you will have to start at the beginning of the form and re-enter your responses.

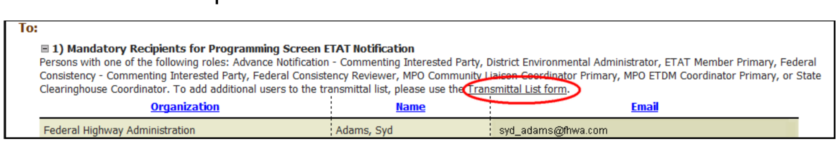
3.3.6.3.2 Viewing and Selecting Recipients

The **Draft ETAT Notification** page lists the recipient types who will receive the Programming Screen notification**.** The list of recipient types is different for EST users and public access users:

- **EST Access**
  - **Mandatory Recipients**
  - **Other Recipient(s)**
  - **Select Additional Recipients That Should Be Included**
- **Public Access**
  - **Mandatory Recipients for ETAT Notification**
  - **Select Additional Recipients That Should Be Included**

1. To view a list of recipients, click the plus sign, ⊞ , beside the label number to expand the list.

Tip! To add an individual or organization to the **Other Recipient(s)** list, click the **Transmittal List form** link at the top of the section.



Tip! Click the minus sign, ⊟, to collapse the list.

2. To select recipients from the **Additional Recipients** list, do the following:

- Click the plus sign, ⊞, beside the **Select Additional Recipients label** to expand the list.
- Click the check box for the name you want to include as a recipient.

Note: The names shown in the **Additional Recipients** list are populated from your personal contact list that you created with the **My Contact List** feature in the EST.

	Organization	Name	Email
☐	OT District 7	Severson, Joseph	test-FD7-joseph.severson-ou6904@devnull.fla-etat.org
☑	FL Department of Environmental Protection	Branda, Robin	test-FDEP-robin.branda-ou2247@devnull.fla-etat.org

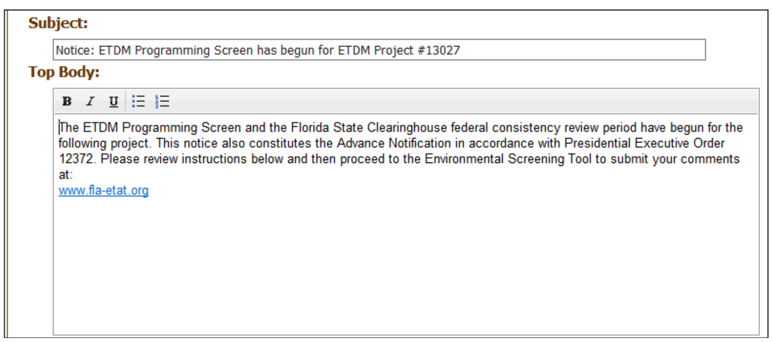
Tip! To add to or change your contact list, click the **My Contact List** link to open the form.

3.3.6.3.3 Viewing and Editing the Email Content

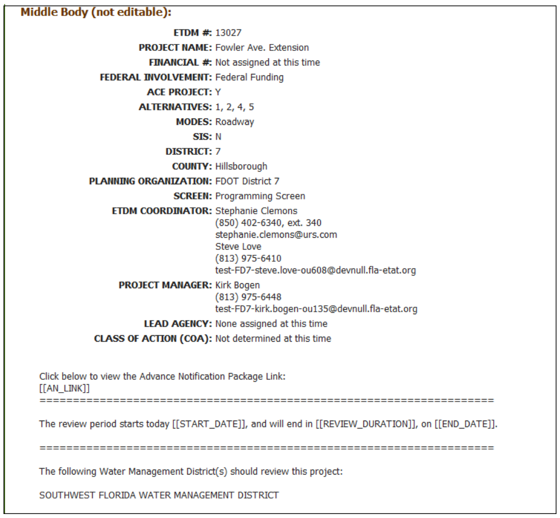
The notification header and top body display the following:

- **Subject Line** – Displays the Programming Screen notification message and project number.
- **Top Body** – Displays a text box for adding information about the review, such as a list of the alternatives to be reviewed.

Edits to the **Subject** line or **Top Body** can be made by typing the information into the box. A link to the EST is provided for the recipient to enter comments.



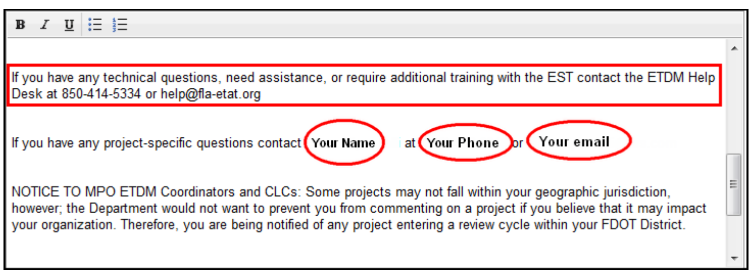
Additional information about the project is shown in the **Middle Body**, including details about the review dates and project contact information, along with a link to the Advance Notification package.



Note: This section of the notification is in a read-only view that is automatically generated by the system.

The **Bottom Body** of the email describes the recipients' review tasks, along with links to reference and contact information.

- Use the box scroll bar to review the information provided in the text box.
- Review the contact information located at the conclusion of the message to verify it is accurate.

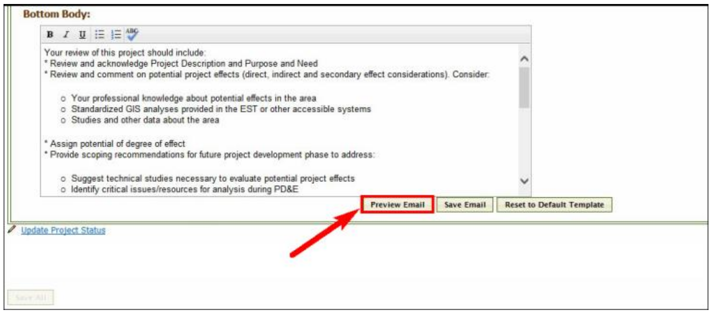


- Make any changes by typing—or copying and pasting—your edits directly into the text box. The formatting box becomes active after you click on the text box.

3.3.6.3.4 Previewing and Saving an Email

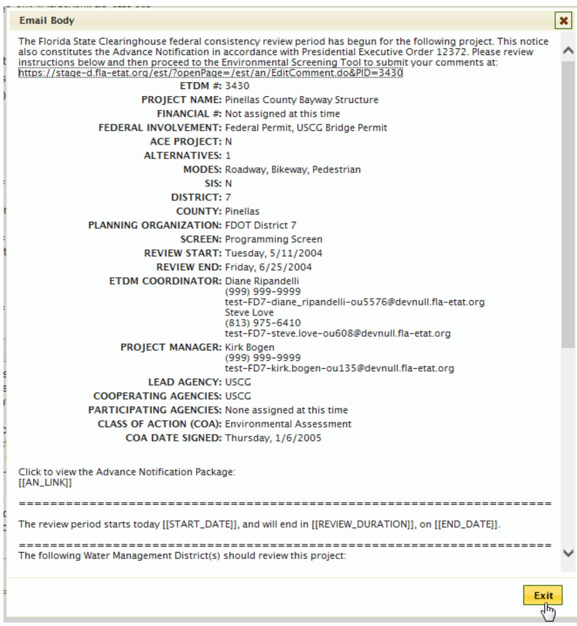
After you have completed the setup of the Draft ETAT Notification, you can review the email contents by doing the following:

1. Click **Preview Email**.



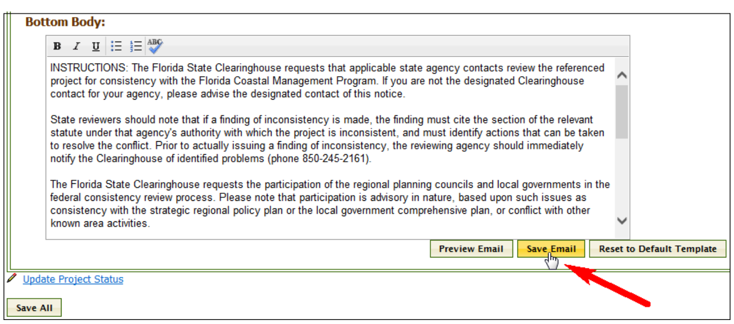
The **Email Body** screen displays, allowing you to view the email in the format that will be displayed to the recipients.

2. Click **Exit**.



The screen returns you to editing mode, where you can make additional changes, if needed.

3. Click **Save Email** to save the information.

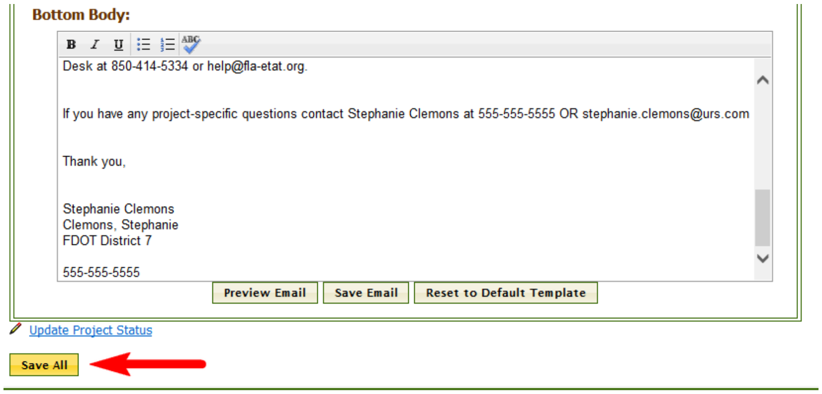


Tip! To erase email text and return to the default email template, click the **Reset Default Template** button.

3.3.6.3.5 Saving All Notifications

The **Save All** button that is provided at the bottom of the **Draft ETAT Notification** page allows you to save the content for notifications to both **EST Access** and **Public Access**.

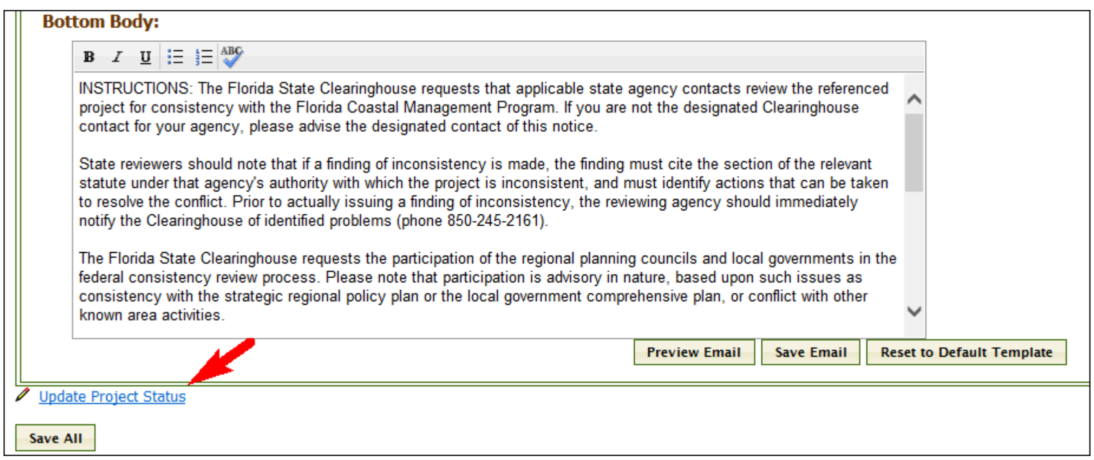
Note: If the notification is only for the initiation of a Programming Screen review (i.e., no Public Access Notification), then a **Save** button will appear.



3.3.6.3.6 Updating the Project Status

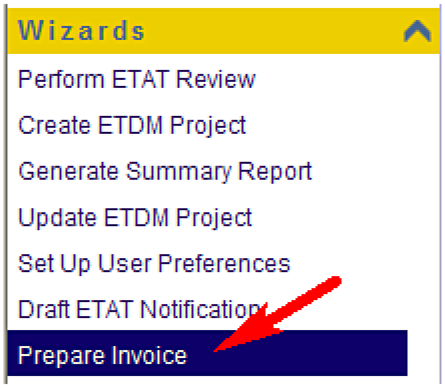
The **Draft ETAT Notification** tool provides easy access to the **Update Project Status** form, where you can move an alternative's status to **ETAT Review**.

Tip! See the Update Project Status section of the EST User Handbook for steps on using this feature.



3.3.7 Invoice Wizard (Updated 07/15/2008)

The **Invoice Wizard** can be used by an agency's Invoice Submitter to prepare an invoice package or Advance Payment Request and submit it to FDOT. To use the Prepare Invoice wizard, log in to the EST using your agency-specific username and password for the Invoice Submitter role. After logging on to the EST, go to the **Wizards** menu and then click **Prepare Invoice**.



The **Prepare Invoice** wizard includes sequential screens for entering invoice information, as follows:

- Enter invoicing period end date
- Upload receipts for the invoicing period
- Confirm uploaded receipts
- Edit Expenses for the invoicing period
  - Personnel
  - Travel
  - Training
  - Other Expenses
- Summarize Agency Activities
- Log Agency Activity
- Assign Hours

When these steps are completed, the Prepare Invoice wizard provides two additional steps for submitting and viewing, saving a PDF version and/or printing the invoice, as follows:

- View/Submit Invoice
- View Invoice Package

If an Advance Payment Request is being prepared using the Prepare Invoice wizard, the steps include:

- Enter invoicing period end date
- Enter anticipated compensation elements (labor and expenses)
- Print, view or save PDF version of submitted Advance Pay Request

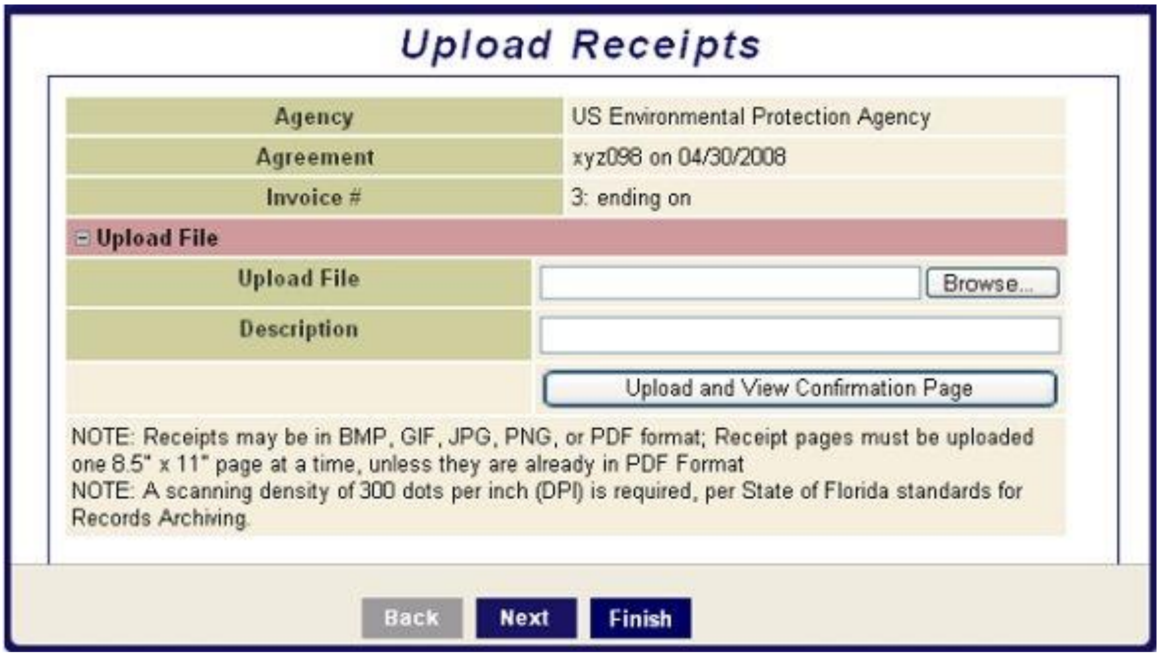
The first screen of the Prepare Invoice wizard displays the agency associated with the Invoice Submitter username and password used to log in to the EST. In the example shown below, the username and password for the U.S. Environmental Protection Agency (USEPA) Invoice Submitter was used. The first screen is also populated with information about the agreements associated with your agency and the Invoicing Period Start date (which is based on the end date of the previous invoice for the selected agreement). If there is more than one agreement for the agency, select the agreement for which you are preparing an invoice from the Agreement pull-down menu. Then enter the Invoicing Period End date for the invoice you are preparing. You can enter the date using the **mm/dd/yyyy** format, or select the date from a calendar using the Calendar feature.

If using the Calendar feature, click on the calendar icon to the right of the Invoicing Period End field, then select the Invoicing Period End date from the calendar, as shown here.

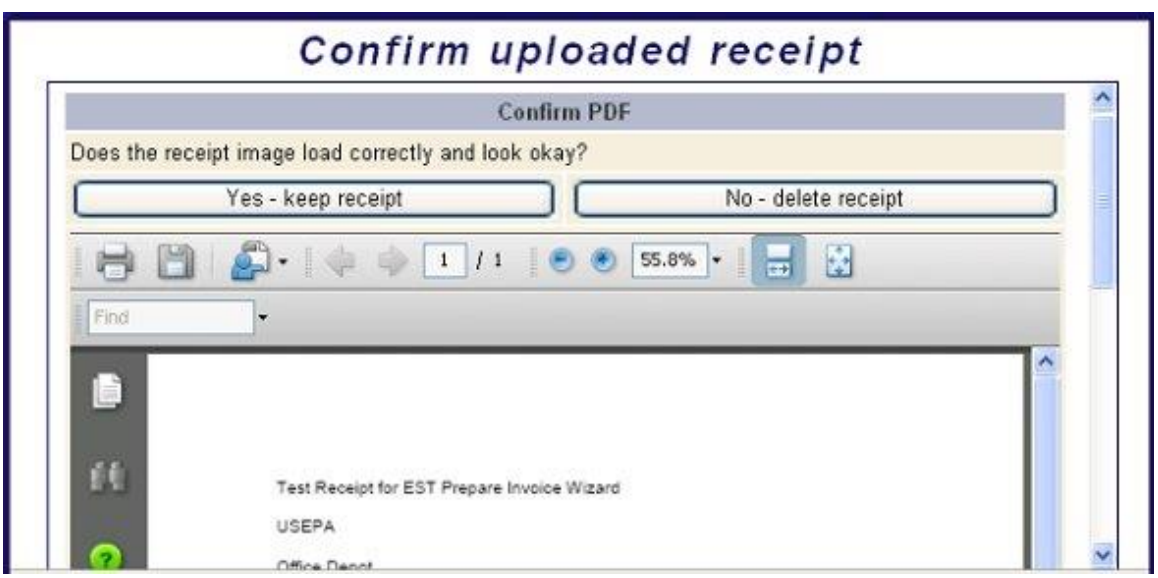
After entering or selecting the Invoicing Period End date, click the Next button at the bottom of the screen.

Upload Receipts

The next screen is used to upload images of receipts associated with the invoice being prepared. Scanned images of expense receipts are required as part of the invoice package. Images of receipts may be in BMP, GIF, JPG, PNG or PDF format, but must be scanned with a scanning density of 300 dots per inch (DPI). Note that receipt pages must be uploaded one 8-1/2 x 11-inch page at a time if they are not in PDF format. To upload images of receipts, use the Browse button to locate and select the file containing the image. Add a brief description of the receipt in the Description textbox. Then click the “Upload and View Confirmation Page” button.



The next screen is used to view the PDF version of the receipt and either keep the receipt as part of the invoice package or delete it. After reviewing the PDF version of the receipt displayed in the lower portion of the screen, click either “Yes – keep receipt” or “No – delete receipt.” When finished, click the “Next” button at the bottom of the screen.



Edit Expenses

The next screen is used to enter invoice amounts for personnel charges, travel expenses, training expenses and other expenses. The top portion of the screen is populated with information about the invoice being prepared (i.e. agency name, agreement number, number assigned to the unsubmitted invoice, and the invoicing period start and end dates). The Invoicing Period End date can be changed by typing in the new date or using the Calendar feature to select a date.

Edit Expenses

Select an Organization and Master Agreement/Contract	
Agency:	US Environmental Protection Agency
Agreement	xyz098 on 04/30/2008
Invoice	#3: ending on 04/11/2008
Currently editing Invoice #3.	
Invoicing Period Start(from previous invoice)	**Invoicing Period End**
03/08/2008	04/11/2008

The next portion of the Edit Expenses screen is used to enter personnel changes for the invoicing period. Click “Add Personnel” to begin.

Add/Remove Personnel

Name and Job Class	Hours Expended	Average Hourly Rate	Cost this Period	
Additional Overhead Amount	0	Total Cost	$0.00	
Overhead %	0	Total w/Overhead	$0.00	Add Personnel

When “Add Personnel” is clicked, a line is added to the form where the person’s name and job classification, number of hours worked during the invoicing period, average hourly rate, additional overhead amount, and overhead percentage are entered. As each number is typed in, the “Cost this Period” amounts are automatically calculated. If personnel charges for more than one person are being invoiced, click “Add Personnel” to enter the charges for each additional person. Note that all fields must contain data, so if you add a line that is not going to be used, you must delete that line by clicking the “Remove” button next to the line. The “Remove” button is also used to delete personnel charges that were previously entered (prior to finalizing and submitting the invoice).

Add/Remove Personnel

Name and Job Class	Hours Expended	Average Hourly Rate	Cost this Period	
Miscellaneous	0	0	$0.00	Remove
Additional Overhead Amount	0	Total Cost	$0.00	
Overhead %	0	Total w/Overhead	$0.00	Add Personnel

The next portion of the Edit Expenses screen is used to enter travel expenses for the invoicing period. Begin by clicking the "Add Expense" button. A line will be added to the form, as shown here, where a description of the travel expense and the amount are entered. Note that an image of the receipt for each travel expense amount must be included before an invoice can be finalized and submitted. To include additional travel expenses, click the "Add Expense" button again. If a line is added that is not subsequently used, click the "Remove" button to delete the line. The "Remove" button is also used to delete expenses that were previously entered (prior to finalizing and submitting the invoice).

⊟ Add/Remove Travel Expenses

Description	Amount	Receipt	
	0	Not listed (pick later)	Remove
Total Cost	$0.00		Add Expense

The next portion of the Edit Expenses screen is used to enter training expenses for the invoicing period. Begin by clicking the "Add Expense" button. A line will be added to the form, as shown here, where a description of the training expense and the amount are entered. Note that an image of the receipt for each training expense amount must be included before an invoice can be finalized and submitted. To include additional training expenses, click the "Add Expense" button again. If a line is added that is not subsequently used, click the "Remove" button to delete the line. The "Remove" button is also used to delete expenses that were previously entered (prior to finalizing and submitting the invoice).

⊟ Add/Remove Training Expenses

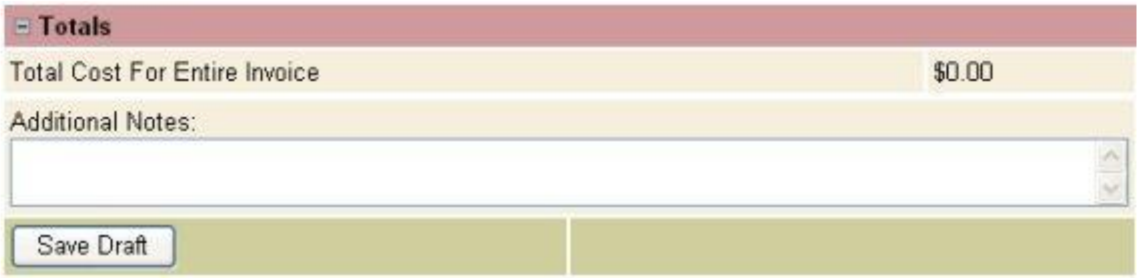
Description	Amount	Receipt	
	0	Not listed (pick later)	Remove
Total Cost	$0.00		Add Expense

The next portion of the Edit Expenses screen is used to enter other expenses for the invoicing period. Begin by clicking the "Add Expense" button. A line will be added to the form, as shown here, where a description of the expense and the amount are entered. Note that an image of the receipt for each expense amount must be included before an invoice can be finalized and submitted. In the example shown, a previously uploaded receipt has been included. To include additional expenses, click the "Add Expense" button again. If a line is added that is not subsequently used, click the "Remove" button to delete the line. The "Remove" button is also used to delete expenses that were previously entered (prior to finalizing and submitting the invoice). Note that all fields must be completed. In the example shown, a description of the expense and amount would need to be entered before saving the draft invoice.

⊟ Add/Remove Other Expenses

Description	Amount	Receipt
	0	Receipt: 07/14/08 Supplies $20.00 PDF
Total Cost	$0.00	

The final portion of the Edit Expenses screen displays the total cost for the invoice being prepared, and provides a textbox for entering additional notes, if needed. The total cost for the invoice is automatically calculated based on the amounts entered for personnel, travel, training, and/or other expenses. To save the entries, click "Save Draft." To proceed to the next step for preparing the invoice, click the "Next" button at the bottom of the screen.



Summarize Agency Activities

The next screen is used to enter information about agency activities for the invoicing period. The top portion of the screen is populated with information about the invoice being prepared (i.e. agency name, agreement number, number assigned to the unsubmitted invoice, and the invoicing period start and end dates).

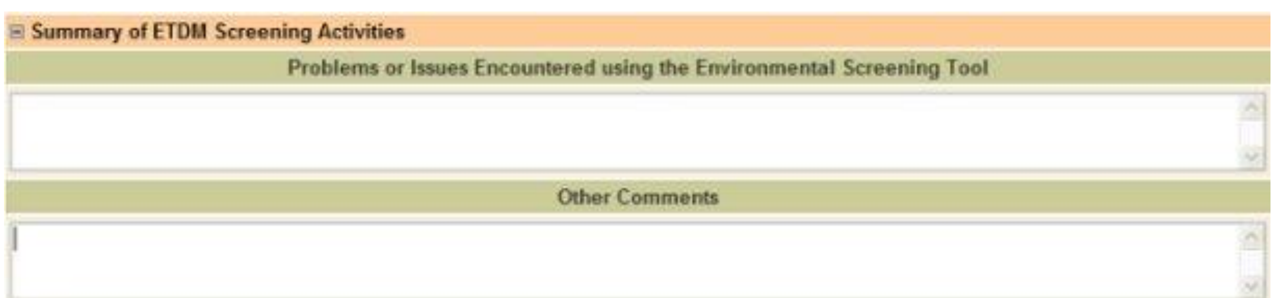
The remaining portions of the screen are used to enter narrative about agency activities, with separate sections for accomplishments made during the invoicing period, a summary of ETDM screening activities, and anticipated accomplishments for the next invoicing period, as shown in the example. Enter a brief description of activities for each category, using the textboxes.

The first section is used to enter information about accomplishments made during the invoicing period.

Following are guidelines for the information for each category under Accomplishments Made During Period:

- Administrative or Supervision Tasks – discuss management and/or supervision tasks performed during the period
- Coordination – discuss non-field interagency and FDOT coordination
- Performance Measures – discuss how the agency has performed on the Performance Measures outlined in the Agreement
- Problems Encountered/Suggestions for Improvement – provide information on any problems discovered or anticipated, and any proposed improvements that would facilitate the streamlining effort of the ETDM Process

Under Summary of ETDM Screening Activities, use the textboxes to describe any problems encountered using the EST and any other comments.

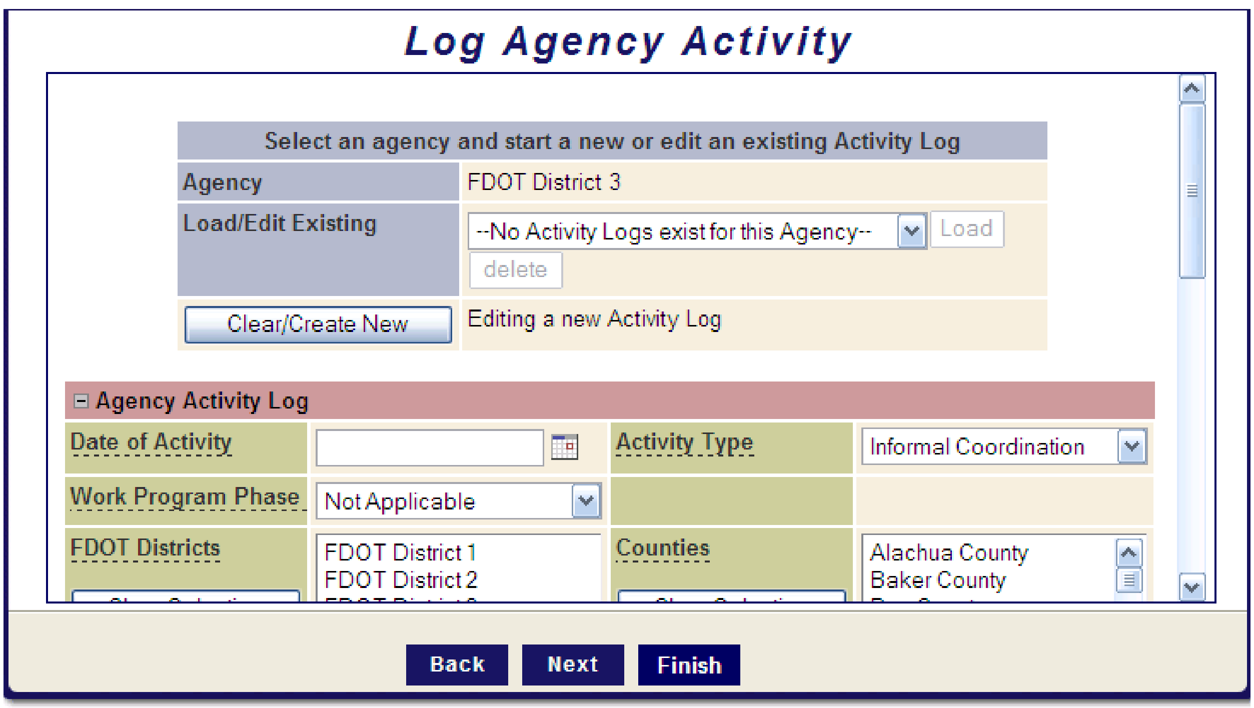


Under the Anticipated Accomplishments for Next Period, enter a brief description of anticipated activities for the next invoicing period, and the number of anticipated hours and number of persons performing the anticipated activities. When finished, click the "Save Draft" button on the left side of the screen, then click "Next."

Log Agency Activities

The next screen is used to provide details about agency activities that are not recorded in the EST. These may include activities such as meetings, technical support of non-ETDM projects, and permit coordination. If there are no agency activities to log, click "Finish" to proceed to the View/Submit Invoice screen.

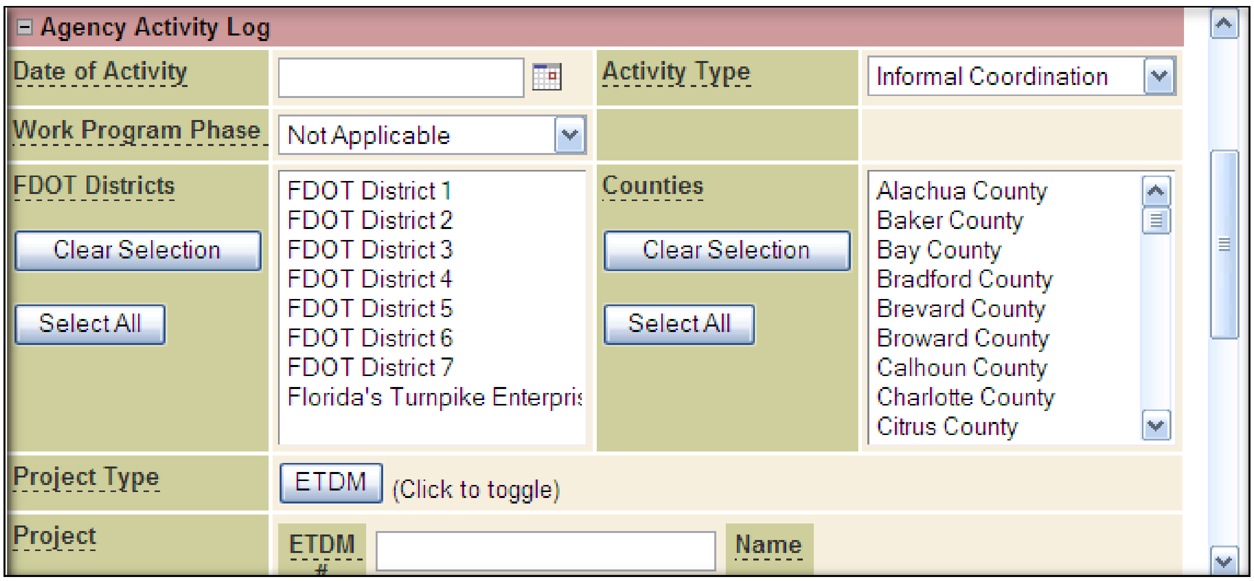
Each agency activity is logged individually. This screen can also be used to edit Activity Logs previously submitted via the EST.



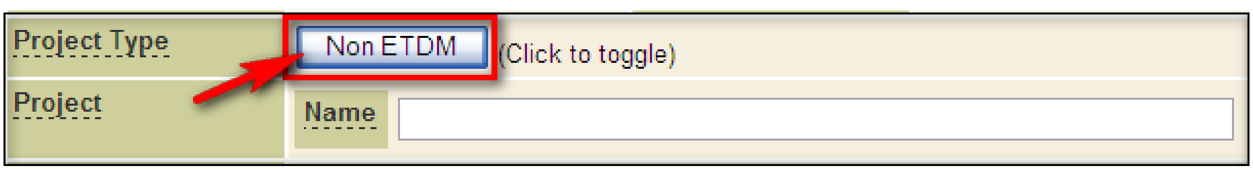
Agency activities are entered during this step using the Prepare Invoice wizard, or may be entered at any time by an agency ETAT representative using the Log Agency Activity tool found on the main menu under Invoicing Tools in the Tools menu.

Begin by either selecting an existing Activity Log to be edited from the pull-down menu, or click “Clear/Create New” to add an Activity Log. Use the form that opens to enter or edit the activity information.

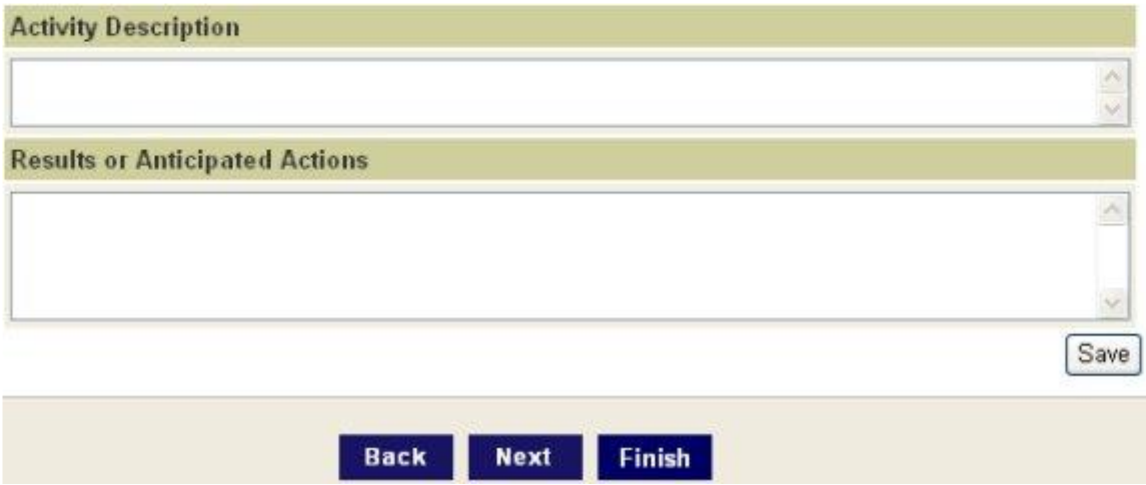
First, enter the date of the activity by either typing in the date (in mm/dd/yyyy format) or select the date from a calendar by clicking the icon. Then use the pull-down menus to select Activity Type, Work Program Phase, FDOT District, County, and ETAT Representative. If the activity is related to an ETDM project, type in the ETDM project number in the Project field, then press the tab key. Then enter the number of hours for the activity.



If the activity is not directly related to an ETDM project, click the **ETDM** button to toggle to **Non ETDM**. Select and load a project from the pull-down menu or create a new record by clicking “create new.” Enter the information for the project, as shown below, and then click “Save.” You can then enter the number of hours associated with the activity.



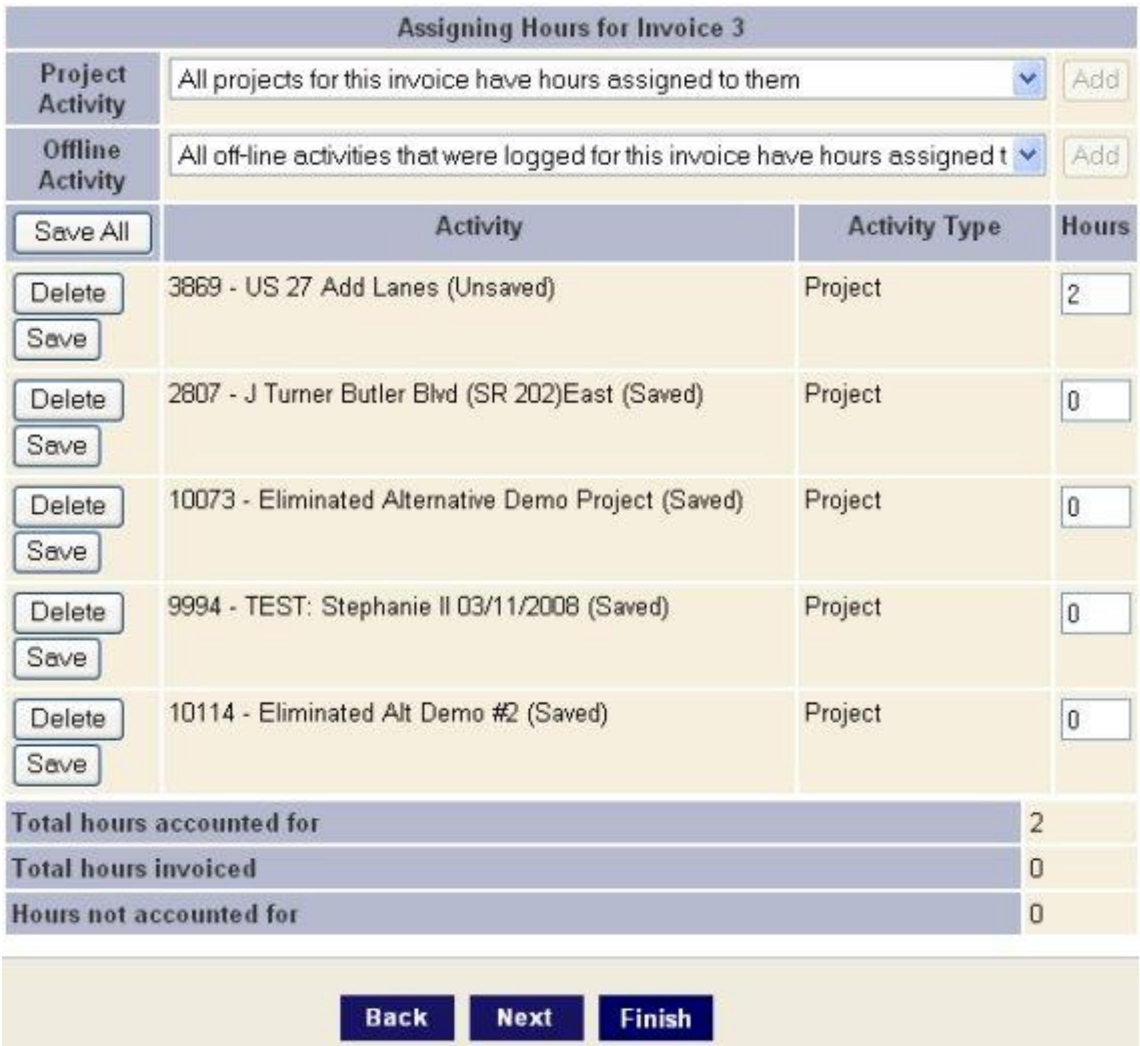
Use the Activity Description textbox to type in a brief text description of the activity being logged. Use the Results or Anticipated Actions textbox to describe any actions taken by FDOT or the agency as a result of the activity or any actions anticipated. When finished, click “Save.” Then click “Next” to go to the next step, or click “Finish” to proceed to viewing and submitting the invoice,.”



Assign Hours

The next screen is used to assign hours for each project or activity, or update hours previously assigned using the Agency Activity screen. The top portion of the screen displays the Agency, Agreement, and Invoice number for which hours are being assigned.

The bottom portion of the Assign Hours screen is used to enter the number of hours for project activities and, if needed, to update the number of hours for agency activities. The form will be populated with the number of hours entered into the database via the Activities Log. To assign hours for a project activity or update hours for an agency activity, enter the number of hours in the “Hours” field to the right of the activity, then click “Save.” If you are assigning or updating hours for more than one activity, enter the number of hours for each activity, then click the “Save All” button at the top left side of the list. Note that as you enter hours for an activity, the “Total hours accounted for” field at the bottom of the list will automatically change to reflect the total number of hours assigned for the listed activities. When finished, click the “Next” button at the bottom of the screen.



View/Submit Invoice

The View/Submit Invoice screen includes a Payment Tracking Report and Agency Activity Report for the invoice that has been prepared. The Payment Tracking Record includes a summary of the agreement information pertaining to the invoice, followed by completed Schedule A-1 (Salary Costs), Schedule A-2 (Assigned Hours), Schedule E-1 (Reimbursable Direct Expense – Travel), Schedule E-2 (Reimbursable Direct Expense – Training), and Schedule E-3 (Reimbursable Direct Expense – Other) forms. The Agency Activity Report, which includes the information entered on the Summarize Agency Activities screen and the Log Agency Activity screen (if applicable), includes Accomplishments Made during Last Period, Summary of ETDM Screening Activities, Anticipated Accomplishments for Next Period, and Agency Activities Log (if applicable). Examples of a Payment Tracking Report and Agency Activity Report are shown below.

Example Payment Tracking Report

⊟ Payment Tracking Report

⊟ Summary

Agency	US Environmental Protection Agency
Address	Address does not exist.
Report Number	3
Federal Project	001
MA Number	xyz098
Financial No	12345678901
Notice to Proceed Date	01/01/2008
End of Service Date	01/01/2010
AOA Renewal Date	01/01/2010

Name and Job Class	**Hours Expended**	**X**	**Average Hourly Rate**	**=**	**Cost This Period**
Total Direct Salary Costs					$0.00
Overhead	Allowable Overhead Percentage:		0.0%		$0.00
	Additional Overhead:		$0.00		
Total Salary Related Costs					$0.00
Spent to Date					$0.00
Balance					$40,000.00

Spending Details	**Total Spent to Date**	**Previously Spent**	**Current Spent**	**Balance**
Salary Related Costs & Benefits	$0.00	$0.00	$0.00	$10,000.00
Direct Expenses - Travel	$0.00	$0.00	$0.00	$10,000.00
Direct Expenses - Training	$0.00	$0.00	$0.00	$10,000.00
Direct Expenses - Other	$0.00	$0.00	$0.00	$10,000.00
Total	$0.00	$0.00	$0.00	$40,000.00

By submittal of this invoice, the Agency certifies that all expenditures contained in this invoice represent actual project costs as reflected in our accounting records, and those expenditures are allowable, reasonable, necessary, and in accordance with the Funding Agreement.

The Summary section of the Payment Tracking Report is followed by the Schedule A-1 and Schedule A-2.

Schedule A-1

Agency	US Environmental Protection Agency				
MA/Contract Number	xyz098				
Financial ID No.	12345678901				
Name and Job Class	Hours Expended	X	Average Hourly Rate	=	Cost This Period
Total Direct Salary Costs					$0.00
Overhead	Allowable Overhead Percentage:		0.0%		$0.00
	Additional Overhead:		$0.00		
Total Salary Related Costs					$0.00

Schedule A-2

Activity	Activity Type	Hours
2807 - J Turner Butler Blvd (SR 202)East	Project	0.0
8307 - TEST: Stephanie 10-16-2006	Project	0.0
9993 - TEST: Stephanie 03/11/2008	Project	0.0
9793 - Test: Steph NonViable 02/05/2008	Project	0.0
7920 - St Johns River Crossing	Project	0.0
9953 - TEST: Steph Milestone Grouping IV - 03/03/2008	Project	0.0
3869 - US 27 Add Lanes	Project	0.0
9753 - TEST	Project	0.0
10013 - TEST: Steph 03/12/2007	Project	0.0
10033 - Test: Sarah Non-Viable 3/13/2008	Project	0.0
10073 - Eliminated Alternative Demo Project	Project	0.0
9994 - TEST: Stephanie II 03/11/2008	Project	0.0
10114 - Eliminated Alt Demo #2	Project	0.0
Total Hours Accounted For		0.0

The Schedule A-1 and Schedule A-2 sections of the Payment Tracking Report are followed by the Schedule E-1, Schedule E-2, and Schedule E-3, followed by a list of Attachments (if applicable).

⊟ Schedule E-1

Agency	US Environmental Protection Agency
MA/Contract Number	xyz098
Financial ID No.	12345678901

REIMBURSABLE DIRECT EXPENSE -TRAVEL (1)

Item Description	Amount
Total Reimbursable Direct Travel Expenses	$0.00

(1) All requests for reimbursement for travel expenses must be supported by a completed State of Florida Voucher for Reimbursement of Travel Expenses or similar Federal forms per 41CFR, chapter 301 and accompanied with receipts, invoices, etc.

⊟ Schedule E-2

Agency	US Environmental Protection Agency
MA/Contract Number	xyz098
Financial ID No.	12345678901

REIMBURSABLE DIRECT EXPENSE -TRAINING

Item Description	Amount
Total Reimbursable Direct Training Expenses	$0.00

All requests for reimbursement must be accompanied with receipts, invoices, etc.

⊟ Schedule E-3

Agency	US Environmental Protection Agency
MA/Contract Number	xyz098
Financial ID No.	12345678901

REIMBURSABLE DIRECT EXPENSE -OTHER

Item Description	Amount
Total Reimbursable Direct Other Expenses	$0.00

All requests for reimbursement must be accompanied with receipts, invoices, etc.

⊟ Attachments

- Test Receipt 04/08/2008

Example Agency Activity Report

⊟ Agency Activity Report

⊟ Accomplishments Made During Period: 03/08/2008 to 04/11/2008

Administrative or Supervision Tasks

Coordination

Performance Measures

Problems Encountered/Suggestions for Improvement

Total Staff Hours	0.0	*(From Schedule A-1)*
Total Number of People Involved	0	*(From Schedule A-1)*

⊟ Summary of ETDM Screening Activities

Number of Projects Reviewed:	0
Number of Alternatives Reviewed:	0
Number of Reviews Found:	0

Problems or Issues Encountered using the Environmental Screening Tool

Other Comments

⊟ Anticipated Accomplishments for Next Period

Description of Activities

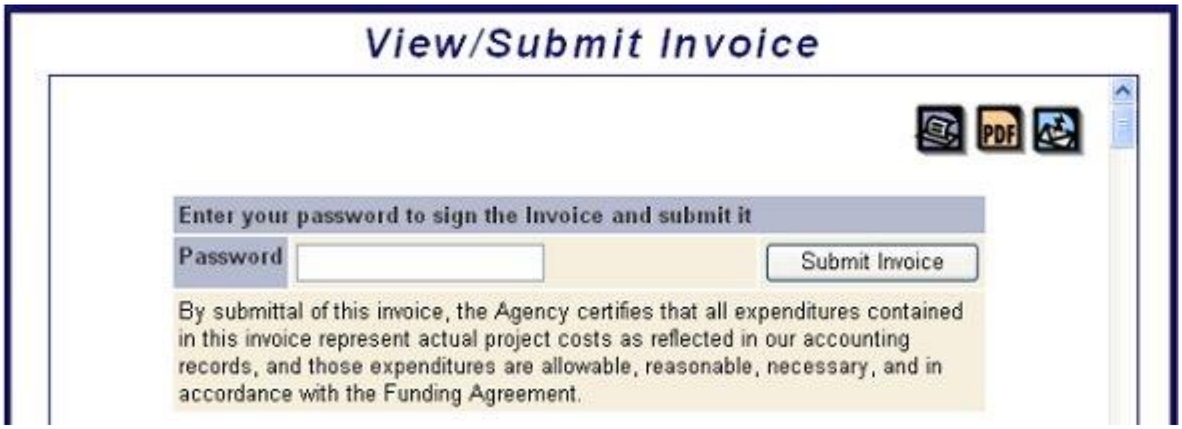
Total Staff Hours Anticipated	0.0
Total Number of People Involved	0

⊟ Off-Line Agency Activity Log

None

If changes need to be made to the invoice before submittal, click the button on the far right side of the screen to close the wizard. You can then access the unsubmitted invoice selecting Prepare Invoice on the Wizards menu, and make any necessary changes.

Use the icons at the top of the screen to print the invoice or save it on your computer as a PDF file. To submit the invoice, enter the Invoice Submitter password for your agency, and click "Submit Invoice."



When the invoice is submitted, a PDF file of all of the components is created and stored in the database. The PDF will have the submittal date and "DRAFT" printed on each page. The Invoice Administrator and Invoice Reviewers receive an email informing them that the draft invoice is available on the EST for their review. The Invoice Submitter receives a copy of the email. The email identifies the invoice by agency, agreement number, invoice number, and submittal date.

Advance Pay Request

The Prepare Invoice wizard can be used to prepare requests for Advance Payment and to report expenditures by agencies that are authorized to receive advance payment. On the first screen of the Prepare Invoice wizard, select the agreement for which advance payments have been authorized. Enter the Invoicing Period End date by either typing in the date (in mm/dd/yyyy format) or selecting the date from a calendar by clicking the icon. The Advance Payment Request form that opens is automatically populated with information about the agreement, as shown in the example.

Next, enter the amounts for compensation elements (labor and expenses) for the Advance Pay Request. After the amounts for compensation have been entered, the EST calculates the total amount of the advance payment requested, the total advance payments to date (including the current request), and the balance remaining in the contract.

⊟ Prepare Advance Pay Request (pre-populated data)		
MA / Contract Number	1-082909	
Address:	Address does not exist.	
Federal Project No:	005	
Financial No:	5678	
Brief Task Description	See Attachment A (Project Report)	
⊟ Compensation Elements are as follows:		
Element Description	Method of Compensation	Amount
Labor	Direct Salary plus Overhead	0
Expenses	Actual Expenditures	0
	Amount of Advance Requested	$0.00

Notes about the Advance Pay Request can be added, using the "Other notes" textbox. When finished, click "Save." The data you entered will be added to the database, and will be displayed on the Payment Tracking Report Summary Sheet of your current invoice submittal.

⊟ Final notes and submitting:	
Other notes	
Total Advances to Date (including this one): $1,754.00	Balance: $98,246.00
By submittal of this advance pay Request, the above named Agency certifiees that this is a reasonable estimate of the work to be performed as described in Attachment A (Project Report)	
	Save

Back Next Finish

Click "Next" to add documentation for expenditures associated with your previously submitted Advance Pay Request (also referred to as Current Reporting Period expenditures). Clicking "Next" will take you to the Upload Receipts screen described above, and the wizard will sequence you through all the subsequent steps for documenting expenditures for the Current Reporting Period (i.e., Confirm uploaded receipt, Edit Expenses, Summarize Agency Activities, Log Agency Activity, and Assign Hours).

When finished, click the "Finish" button at the bottom of the screen to proceed to the "View/Submit Invoice" screen. An Advance Pay Request Report, followed by a Payment Tracking Report for the Current Reporting Period expenditures will be displayed, as shown below.

Advance Pay Request Report

Agency: Northwest Florida Water Management District		
Address: Address does not exist.		
Date: 7/14/2008	Advance Request Order No: 15	
Federal Project No.: 005	Financial No.: 5678	
MA Number: 1-082909		
Brief Task Description: See Attachment A (Project Report): See Attachment A (Project Report)		
Compensation Elements are as follows:		
Element Description	**Method of Compensation**	**Amount**
Labor	Direct Salary plus Overhead	$1,500.00
Expenses	Actual Expenditures	$500.00
	Amount of Advance Requested	$2,000.00
Other Notes:		

Total Advances to Date:	$3,754.00	Balance:	$96,246.00

Payment Tracking Report

Summary

Agency	Northwest Florida Water Management District
Address	Address does not exist.
Report Number	15
Federal Project	005
MA Number	1-082909
Financial No	5678
Notice to Proceed Date	07/11/2003
End of Service Date	07/07/2008
AOA Renewal Date	07/08/2008

Check the information for accuracy. If changes need to be made before submittal, click the X button on the far right side of the screen to close the wizard. You can then access the unsubmitted Advance Pay Request and invoice package by selecting Prepare Invoice on the Wizards menu, and make any necessary changes.

Use the icons at the top of the screen to print, save as a PDF file, or email the Advance Pay Request and invoice package. To submit the Advance Pay Request, enter the Invoice Submitter password for your agency, and click "Submit Invoice."