

Chapter 3	Functions	662
3.3	Wizards (Updated 02/15/2016)	662
3.3.1	Perform ETAT Review (Updated 02/15/2016)	662
3.3.2	Create New Project (Updated 04/30/2012)	664
3.3.2.1	GIS Data Quality Review Checklist	670
3.3.3	Publish Summary Report Wizard (new 12/12/2005)	671
3.3.3.1	Planning Summary Report	673
3.3.3.2	Programming Summary Report	682
3.3.4	Update ETDM Project (Updated 02/15/2015)	692
	Navigating the Update ETDM Project Wizard	693
	Entering Information	694
	Enter Project Information	694
	Enter Alternative Description	695
	Enter Segment Description	696
	Add Additional Project Information	696
	Advance Notification	697
3.3.5	Set Up User Preferences (Updated 01/06/2006)	698
3.3.6	Draft ETAT Notification (Updated 01/15/2015)	703
3.3.6.1	Accessing the Draft ETAT Notification Wizard	703
3.3.6.2	Draft ETAT Notification for Planning Screen	704
3.3.6.2.1	Viewing and Selecting Recipients	704
3.3.6.2.2	Viewing and Editing the Email Content	705
3.3.6.2.3	Previewing and Saving an Email	707
3.3.6.2.4	Updating the Project Status	708
3.3.6.3	Draft ETAT Notification for Programming Screen	709
3.3.6.3.1	Selecting the Notification Content	709
3.3.6.3.2	Viewing and Selecting Recipients	712
3.3.6.3.3	Viewing and Editing the Email Content	713
3.3.6.3.4	Previewing and Saving an Email	714
3.3.6.3.5	Saving All Notifications	716
3.3.6.3.6	Updating the Project Status	716
3.3.7	Invoice Wizard (Updated 07/15/2008)	716

Chapter 3 Functions

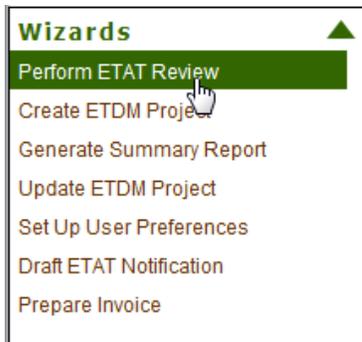
3.3 Wizards (Updated 02/15/2016)

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:

The screenshot shows the 'Perform ETAT Review' wizard interface. It includes a search criteria section with dropdown menus for 'County' (set to '-All-') and 'Assigned Organization(s)' (set to 'FDOT District 1'). There are radio buttons for 'Show results for all members of selected organization' and 'Show results for only'. Below this is a 'Key' section with a table of projects.

Event Name	Start Date	End Date	Days Left	Organization	Review Authority
Kenny Testina 10/20/2015	10/03/2015	12/31/2015	28	FL Department of Transportation	Yes

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.

Projects Needing Review					
Search Criteria					
Key					
Planning Screen (0)	Programming Screen (0)	AN (0)	ACE (1)	Comments after Review Period (0)	Document Reviews (1)
Event Name	Start Date	End Date	Days Left	Organization	Review Authority
Document Review - Bruce	10/29/2015	12/28/2015	25	FL Department of Transportation	Yes

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

Review Document 🔍 ?

Event Details

Event: Document Review - Bruce
Managing Organization: FL Department of Transportation
Start Date: 10/29/2015
End Date: 12/28/2015
Description:
 water

Related Document Review Event(s): There are no other Document Review events related to this event.
Related ETDM Project(s): There are no ETDM projects related to this event.

Event Documents

Document (PDF)	Size	Type	Line Numbers Available	Description
Testing	81 KB	Class of Action Determination	Yes	description

Identity
 Review this document as Diane Ripandelli © FL Department of Transportation

Review
 Enter your review comments below. You can also attach documents to supplement your review.

* Required fields are marked with an asterisk

Document: Testing

* **Scope of Comment:** Global (applies to the document in general)
 Specific Location
 Start Line End Line *Start and End Line must be numeric values.*

* **Comments:**

B *I* U **☰** **☰**

Supporting Document (optional):

* Location comment is required.
 * Start and End Line are required when comments are not global.

Document Reviews

Testing
Official Reviews
 There are no official reviews available.

Staff Reviews
 There are no staff reviews available.

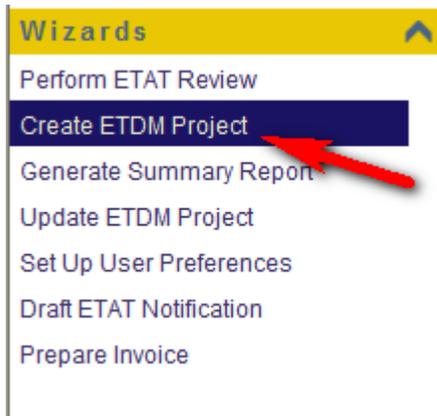
5. Click **Save Review**.

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.

The screenshot shows a form titled 'Create New Project' with a sub-header 'Enter Information For New Project'. The form contains the following fields:

Project Name **	<input type="text"/>
Planning ID	<input type="text"/>
Local Agency Program (LAP) **	No <input type="button" value="v"/>
Financial Management No.	<input type="text"/> Ex: 01234567891
Planning Organization	FDOT District 7
Alternative Corridor Evaluation (ACE)	No <input type="button" value="v"/>
ETDM Phase	Planning Screen <input type="button" value="v"/>
Project Web Site	<input type="text"/> x
User Identity	Stephanie Clemons @ FDOT District 7

At the bottom of the form are three buttons: 'Back', 'Next', and '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.

Agency Completing NEPA Document **	<input type="radio"/> FDOT <input checked="" type="radio"/> Local Agency (with FDOT oversight)
LAP Agency Certification **	Hillsborough County MPO: <input type="radio"/> is already PD&E LAP Certified <input checked="" type="radio"/> will need to be PD&E LAP Certified via LAP Coordinator <small>Certification last updated on 10/07/2010 by FDOT District 7</small>

- 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.

Enter Locational Information	
County **	Select Region(s)  Alachua County  Baker County  Bay County  Bradford County  Brevard County  
Beginning Location	SR 39
Ending Location	Dover Road

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)	<input type="checkbox"/> No Federal Involvement <i>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.</i> <i>A transportation project is considered a federal action, and therefore must comply with NEPA when one of the following conditions applies:</i> <input checked="" type="checkbox"/> Federal Funding <i>Federal funds or assistance is or is expected to be used during any phase of project development or implementation.</i> <input type="checkbox"/> Federal Action <i>Federal approval of an action is required (e.g., change in Interstate access control, use of Interstate right-of-way).</i> <input type="checkbox"/> Federal Permit <i>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).</i> <input type="checkbox"/> Maintain Federal Eligibility <i>Federal funding or assistance eligibility is being maintained for subsequent phases.</i> <input type="checkbox"/> Federal Permit Required without Programming Phase Federal Consistency Review <i>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.</i>
Planning Consistency Status Expand this section	<i>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.</i> 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	<i>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.</i> 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		The <i>Planning Consistency Status</i> 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.			
Collapse this section		For additional guidance, see http://www.dot.state.fl.us/planning/policy/metrosupport			
Are the limits consistent with the plans?		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown			
Currently Adopted CFP-LRTP?		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown			
Original PD&E FAP#		<input type="text"/> - <input type="text"/> - <input type="text"/> FAP# assigned to the PD&E, if applicable.			
Identify MPOs (if applicable)		Selected MPOs: None <small>List of MPOs is based on selected counties.</small>			
Upload Attachments		LRTP Pages <input type="text"/> <input type="button" value="Browse..."/> TIP Pages <input type="text"/> <input type="button" value="Browse..."/> STIP Pages <input type="text"/> <input type="button" value="Browse..."/>			
Phase	Currently Approved TIP	Currently Approved STIP	TIP / STIP \$	TIP / STIP Fiscal Year	Comments
PE (Final Design)	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown	<input type="text"/> \$ <input type="text"/> <small>Use a range</small>	<input type="text"/>	Provide comments as appropriate describing status, activities, and implementation steps needed to achieve consistency. If not in currently approved TIP/STIP, explain.
ROW	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown	<input type="text"/> \$ <input type="text"/> <small>Use a range</small>	<input type="text"/>	Provide comments as appropriate describing status, activities, and implementation steps needed to achieve consistency. If not in currently approved TIP/STIP, explain.
Construction	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown	<input type="text"/> \$ <input type="text"/> <small>Use a range</small>	<input type="text"/>	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.

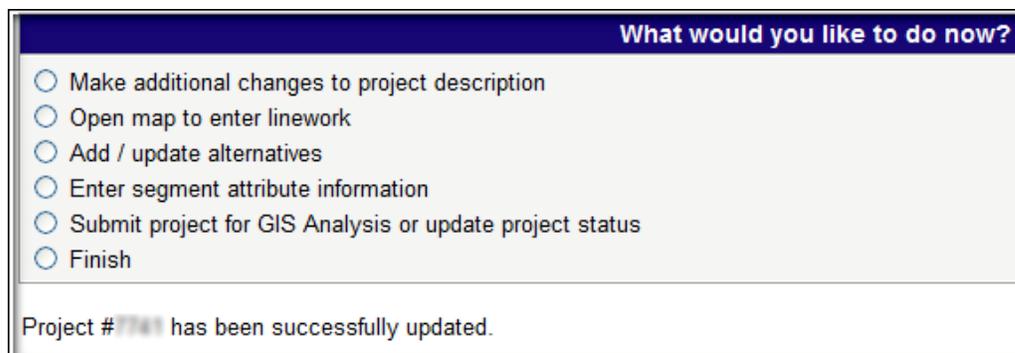
8. Click **Next**.

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 aeriels 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 Aeriels
 - 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.

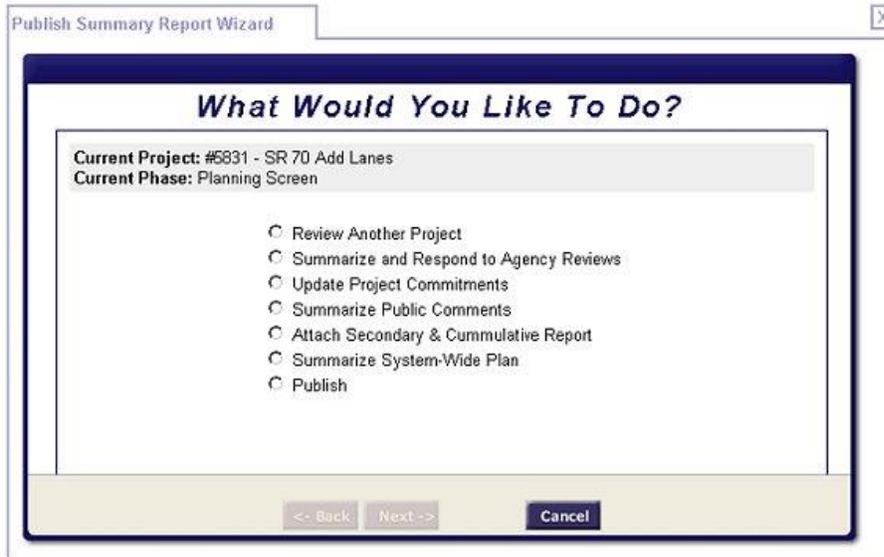
First, select a task by clicking the option button next to a task name (for example, “Summarize and Respond to Agency Reviews”), then click **Next**. Follow the instructions on each screen to complete the task.

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.”

The screenshot shows a web form titled "Select Issue to Review". At the top, it displays "Current Project: #3752 - SR 29 Add Lanes" and "Current Alternative: Alternative #1" with a "change" link. Below this is a section titled "Select an issue to see agency reviews" containing a list of four issues, each with a radio button and a status: "Aesthetics (1 review, 0 responses)", "Air Quality (1 review, 0 responses)", "Coastal and Marine (1 review, 0 responses)", and "Contaminated Sites (1 review, 0 responses)". Underneath the list are two checkboxes: "Issues that have already been summarized" (checked) and "Issue summary required, but not yet completed" (unchecked). At the bottom of the form are three buttons: "<- Back", "Next ->", and "Cancel".

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.

The screenshot shows a web form titled "Summarize or Respond to Issue". It displays the same project and alternative information as the previous form. The "Issue Selected" is now "Aesthetics" with a "change" link. Below this is a section for a review: "Review #1 - FL Department of Transportation, 04/05/2005" with a "respond" link. A grey box contains "Instructions: To summarize the effect for this issue, click the 'NEXT' button. To respond to an agency review, click on the reponse link next to the review (above)." At the bottom are three buttons: "<- Back", "Next ->", and "Cancel".

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.

Respond to Agency Reviews

Current Project: #3752 - SR 29 Add Lanes
Current Alternative: Alternative #1
Issue Selected: Aesthetics

FL Department of Transportation, 04/05/2005

Response To Agency Review

--Select an Organization-- Add

<- Back Next -> Cancel

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.”

Update Project Commitments

Current Project: #8669 - US 27 Add Lanes
Current Phase: Planning Screen

Current Project Commitments

Add New Project Commitment

--Select an Organization-- Add

<- Back Next -> Cancel

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.)

Current Project Commitments		
Date	Comments	
10/13/2005	more... The District will coordinate with the City of Lake Wales and Polk County regarding amendments to their comprehensive plans to show the project on future year transportation maps. During the cultura	edit

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.

Update Project Commitment

The District will coordinate with the City of Lake Wales and Polk County regarding amendments to their comprehensive plans to show the project on future year transportation maps.

During the cultural resource assessment survey, surveyors will coordinate with the Polk County Historical Museum and the Polk County Historical and Genealogical Library.

Charlotte Kelley @ FDOT District 1
Update
Delete
Cancel

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.”

Summarize Public Comments

Current Project: #6351 - Harborview Blvd add lanes
Current Phase: Programming Screen

Summarize Public Comments

The Charlotte County Citizens Advisory Committee has identified capacity improvement of Harborview Blvd as an important element in congestion management and hurricane evacuation.

Save

<- Back
Next ->
Cancel

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.

Public Comments

The Charlotte County Citizens Advisory Committee has identified capacity improvement of Harborview Blvd as an important element in congestion management and hurricane evacuation.

The public comments were successfully summarized above.

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.

Secondary & Cummulative Report

Current Project: #5831 - SR 70 Add Lanes
Current Phase: Planning Screen

no files have been uploaded for this project

Attach Secondary & Cummulative Report

File Description:

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.”

Attach Secondary & Cummulative Report

File Description:

This Secondary and Cumulative Effects Report is a test. It was prepared by C. Kelley on 12/16/05. It is a draft report.

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.”

View Recently Uploaded Files

Attach Secondary & Cumulative Report

File: /etdmBatch/SACIE/Secondary_Cumulative_Effects_Test.doc

File Description:
This Secondary and Cumulative Effects Report is a test. It was prepared by C. Kelley on 12/16/05. It is a draft.

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.)

Current Organization: FDOT District 1 [change](#)

Select a County... ▾

- Select a County...
- Alachua County
- Baker County
- Bay County
- Bradford County
- Brevard County
- Broward County
- Calhoun County
- Charlotte County
- Citrus County
- Clay County

Current Organization: FDOT District 1 [change](#)

Current County: Okeechobee County [change](#)

Select a Year... ▾

- Select a Year...
- 1990
- 2004
- 2020
- 2025
- 9999
- other...

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?”

Publish Report

Current Project: #5831 - SR 70 Add Lanes
Current Phase: Planning Screen

Instructions:

Alternatives for the selected project that began a review period at the same time can be published together and made available to the public. By clicking the “publish” button, a snapshot of this project will be taken as it exists now and added to the list of available summary reports. Click the “Next” button to view the candidate alternatives that are eligible to be published.

Continue?

<- Back Next -> Cancel

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.

Current Project: #5831 - SR 70 Add Lanes
Current Phase: Planning Screen

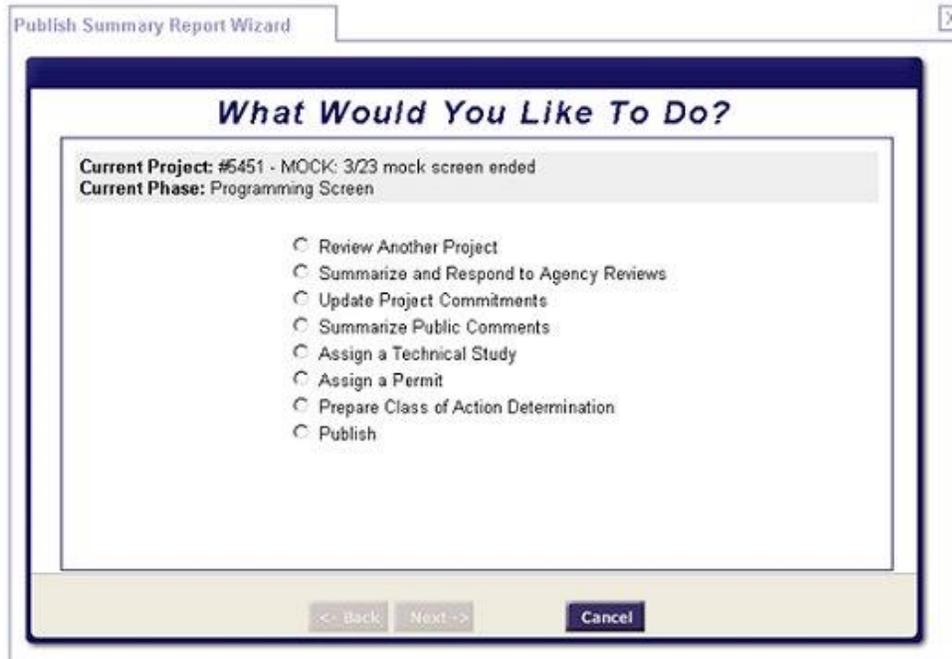
The following alternatives, all of which began the ETAT review process on 6/10/2005, are ready to be published:

- Alternative #1 (ETAT Review Complete)

publish

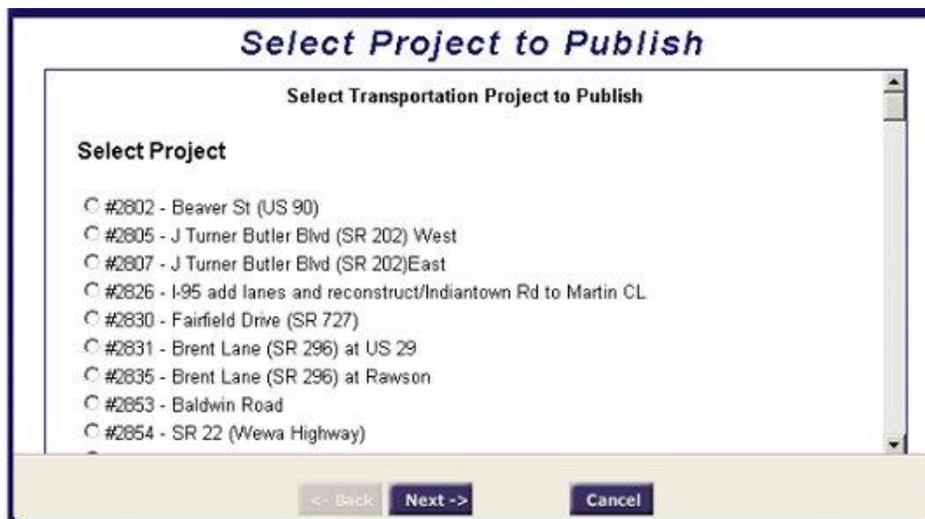
3.3.3.2 Programming Summary Report

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.”

The screenshot shows a web form titled "Select Issue to Review". At the top, it displays "Current Project: #3752 - SR 29 Add Lanes" and "Current Alternative: Alternative #1 [change](#)". Below this is a section titled "Select an issue to see agency reviews" containing a list of four issues, each with a radio button and a status: "Aesthetics (1 review, 0 responses)", "Air Quality (1 review, 0 responses)", "Coastal and Marine (1 review, 0 responses)", and "Contaminated Sites (1 review, 0 responses)". Underneath the list are two checkboxes: "Issues that have already been summarized" (checked) and "Issue summary required, but not yet completed" (unchecked). At the bottom of the form are three buttons: "<- Back", "Next ->", and "Cancel".

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.

The screenshot shows a web form titled "Summarize or Respond to Issue". It displays the same project and alternative information as the previous form, plus "Issue Selected: Aesthetics [change](#)". Below this is a section for "Review #1 - FL Department of Transportation, 04/05/2005 [respond](#)". A grey box contains instructions: "Instructions: To summarize the effect for this issue, click the 'NEXT' button. To respond to an agency review, click on the reponse link next to the review (above)." At the bottom of the form are three buttons: "<- Back", "Next ->", and "Cancel".

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.

The screenshot shows a web form titled "Respond to Agency Reviews". At the top, it displays project information: "Current Project: #3752 - SR 29 Add Lanes", "Current Alternative: Alternative #1", and "Issue Selected: Aesthetics". Below this, there is a checkbox and a label "FL Department of Transportation, 04/05/2005". The main area of the form is a large text box with a blue header "Response To Agency Review". At the bottom of the text box area, there is a dropdown menu with the text "--Select an Organization--" and an "Add" button. At the very bottom of the form, there are three buttons: "<- Back", "Next ->", and "Cancel".

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.”

The screenshot shows a web form titled "Update Project Commitments". At the top, it displays project information: "Current Project: #3192 - US 92 (New Tampa Highway) Add Lanes" and "Current Phase: Programming Screen". Below this, there is a checkbox and a label "Current Project Commitments". The main area of the form is a large text box with a blue header "Add New Project Commitment". At the bottom of the text box area, there is a dropdown menu with the text "--Select an Organization--" and an "Add" button. At the very bottom of the form, there are three buttons: "<- Back", "Next ->", and "Cancel".

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.)

Current Project Commitments

Date	Comments	
09/15/2004	more... The FDOT will complete an Endangered Species Biological Assessment for this project. This will determine the status of any listed species. Potential adverse impacts to each of these species as a result	edit

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.

Update Project Commitment

The FDOT will complete an Endangered Species Biological Assessment for this project. This will determine the status of any listed species. Potential adverse impacts to each of these species as a result of the project will be off-set through the use of appropriate conservation measures to be developed during the the project development phase.

--Select an Organization--

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.”

Summarize Public Comments

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen

Summarize Public Comments

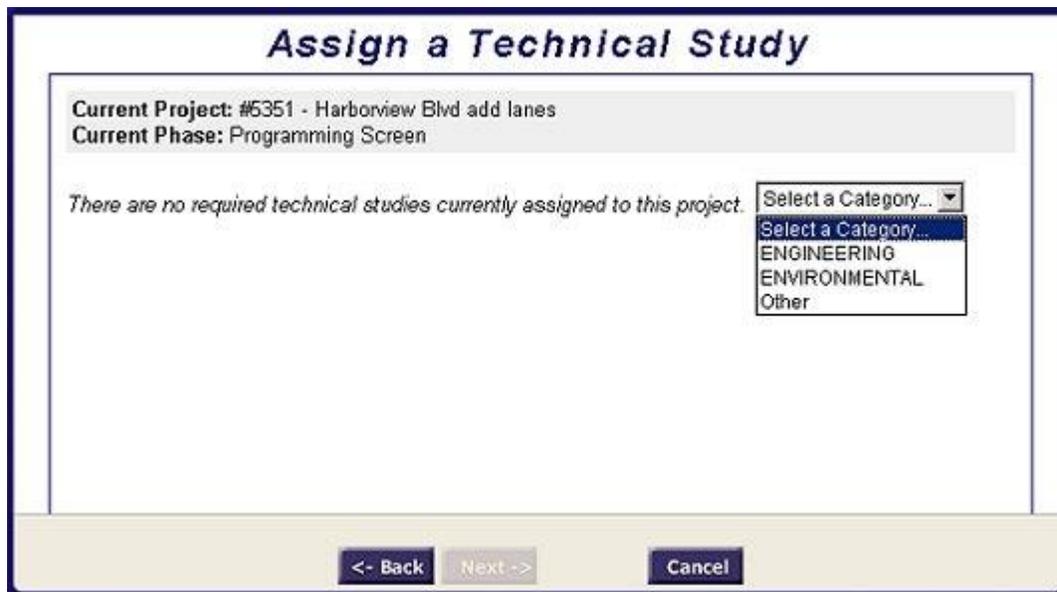
The Charlotte County Citizens Advisory Committee has identified capacity improvement of Harborview Blvd as an important element in congestion management and hurricane evacuation.

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.

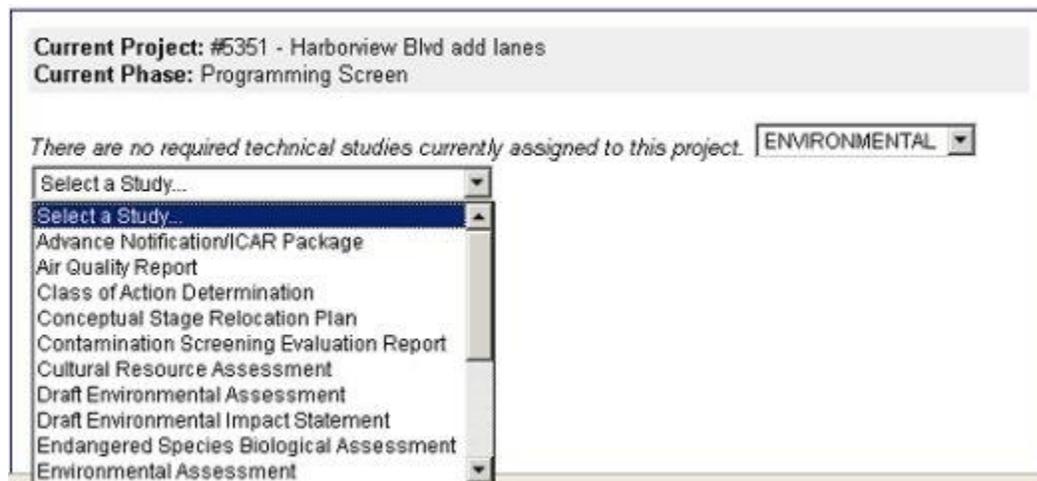


Assign a Technical Study

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.”

There are no required technical studies currently assigned to this project. ENVIRONMENTAL ▾

Air Quality Report ▾

Conditions:

▾

--Select an Organization-- ▾ **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.

Assigned Technical Studies

The required technical study has been saved to the database:

ENVIRONMENTAL - Air Quality Report

To be completed.

More Technical Studies...

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.

Assign a Permit

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen

There are no required permits currently assigned to this project.

Select a Category... ▾

- Select a Category...
- County/Municipality - Local
- Emergency
- Federal
- Other
- State
- Stormwater
- USACE
- Waste
- Water

<- Back **Next ->** **Cancel**

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.

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen
There are no required permits currently assigned to this project.

Stormwater

Select a Permit..

- Select a Permit..
- Construction Generic Permit
- Individual Stormwater Permit
- Large Construction (>= 5 AC)
- Multisector Generic Permit
- Municipal Separate Storm Sewer Systems Permit
- No Exposure Certification
- Small Construction (1-5 AC)

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.”

There are no required permits currently assigned to this project.

Stormwater

Individual Stormwater Permit

Conditions:

--Select an Organization--

Add Study

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.

Assigned Permits

The required permit has been saved to the database:

Stormwater - Individual Stormwater Permit

Individual Stormwater Permit required.

More Permits...

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.”

Class of Action Determination

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen

Class of Action	Other Actions
<input type="radio"/> Categorical Exclusion <input type="radio"/> Environmental Assessment <input type="radio"/> Environmental Impact Statement <input type="radio"/> State Environmental Impact Report	<input type="checkbox"/> Section 4(f) Evaluation <input type="checkbox"/> Section 106 Consultation <input type="checkbox"/> Endangered Species Assessment
Lead Federal Agency	Cooperating Agencies
<input type="radio"/> FL Department of Transportation <input type="radio"/> Federal Highway Administration <input type="radio"/> Federal Transit Administration <input type="radio"/> US Coast Guard	<input type="checkbox"/> COE <input type="checkbox"/> EPA <input type="checkbox"/> FHWA <input type="checkbox"/> FRA <input type="checkbox"/> FTA <input type="checkbox"/> FWS <input type="checkbox"/> NMFS <input type="checkbox"/> USCG <input type="checkbox"/> NONE

Password: **Save**

<- Back
Next ->
Cancel

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.

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen

The Class of Action Determination Profile has been saved.

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?”

Publish Report

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen

Instructions:

Alternatives for the selected project that began a review period at the same time can be published together and made available to the public. By clicking the "publish" button, a snapshot of this project will be taken as it exists now and added to the list of available summary reports. Click the "Next" button to view the candidate alternatives that are eligible to be published.

Continue?

<- Back **Next ->** **Cancel**

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.

Current Project: #5351 - Harborview Blvd add lanes
Current Phase: Programming Screen

The following alternatives, all of which began the ETAT review process on 4/13/2005, are ready to be published:

- Alternative #1 (ETAT Review Complete)

publish

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).

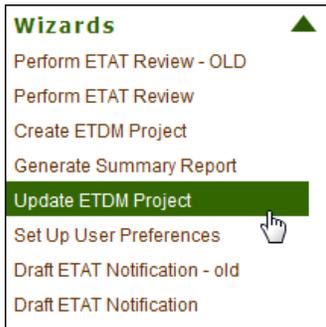
Tip! For further information about the ETDM process, please see the ETDM Manual at <http://www.dot.state.fl.us/emo/pubs/etdm/etdmmanual.shtm>. For additional information of navigating a form, see the EST user handbook.

Accessing and Using the Update ETDM Project Wizard:

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

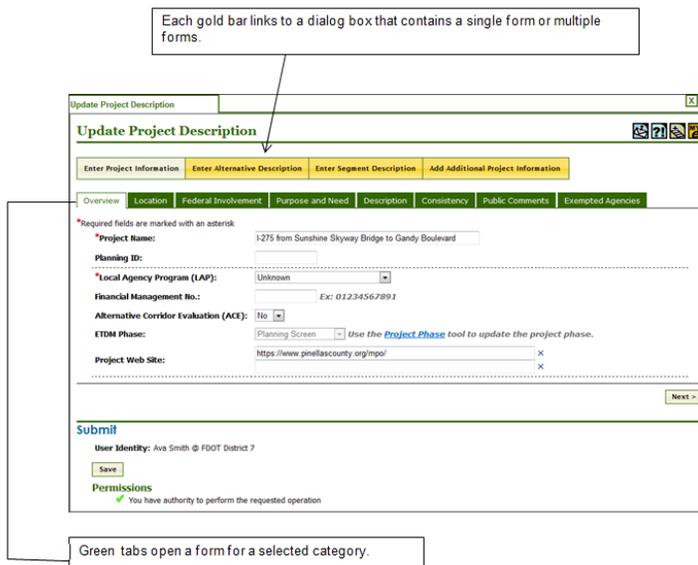


2. On the **Wizards** menu, click **Update ETDM Project**.



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.

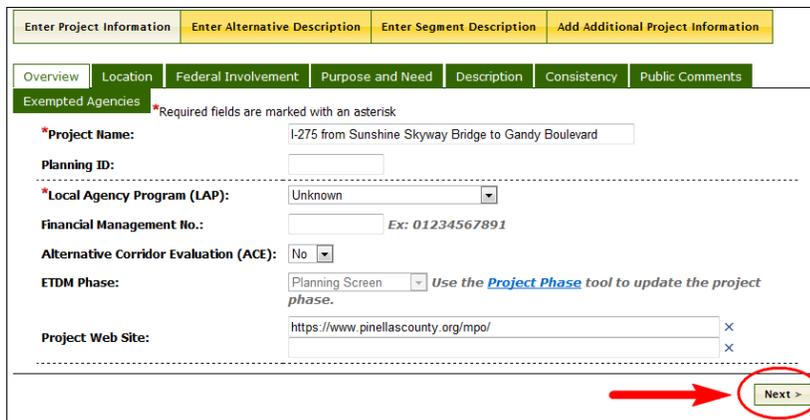
Note: By default, the wizard displays the dialog box for the category labeled **Enter Project Information**, which contains a group of tabs.



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.

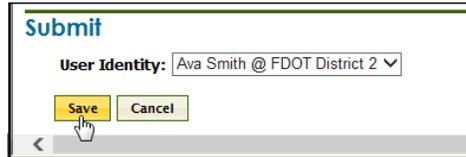


- To open a specific form or navigate between forms, click a tab.



- 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

- 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**.

The screenshot shows a web-based form titled "Add / Update Alternative" with a navigation bar at the top containing four tabs: "Enter Project Information", "Enter Alternative Description" (highlighted in red), "Enter Segment Description", and "Add Additional Project Information". Below the tabs, the form includes a note: "* Required fields are marked with asterisks". The form fields are as follows:

- Alternative Number:** A dropdown menu with "1" selected and a "Go" button.
- *Alternative Type:** A dropdown menu with "Widening" selected.
- Study Area:** A text box with "N" and a note: "The Study Area flag cannot be changed unless the alternative status is Editing."
- *SIS:** A dropdown menu with "Y" selected.
- Total Length:** A text box with "14" and ".89" and "miles" label.
- Total Cost:** A text box with "14700000" and a note: "Numeric input only. Round to the nearest dollar."
- Alternative Name:** An empty text box.
- Beginning Location:** A text box with "Sunshine Skyway Bridge".
- Ending Location:** A text box with "Gandy Boulevard".
- Mode(s):** A list of checkboxes:
 - Roadway
 - Pedestrian
 - Bikeway
 - Transit
 - Rail Facility
 - To be determined

At the bottom of the mode list, there is a note: "(check all that apply)".

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**.

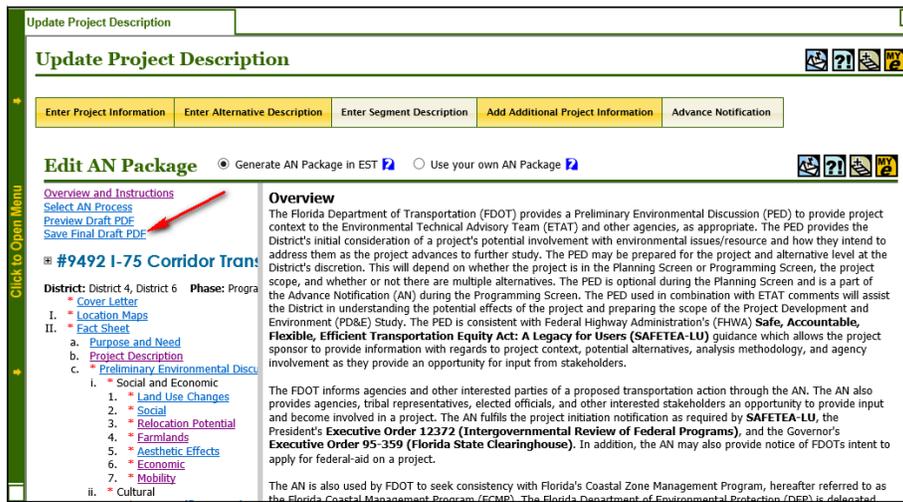
2. Click the appropriate option button to indicate one of the following:

- 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.

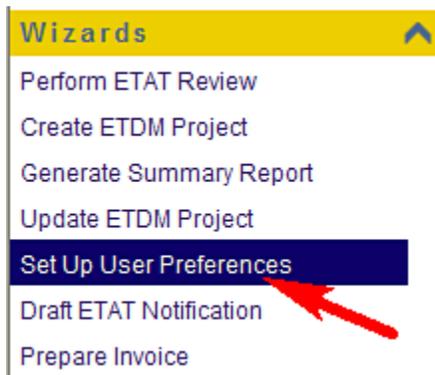
Note: A red asterisk, *, indicates that information needs to be entered in order for the section to be complete.

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:

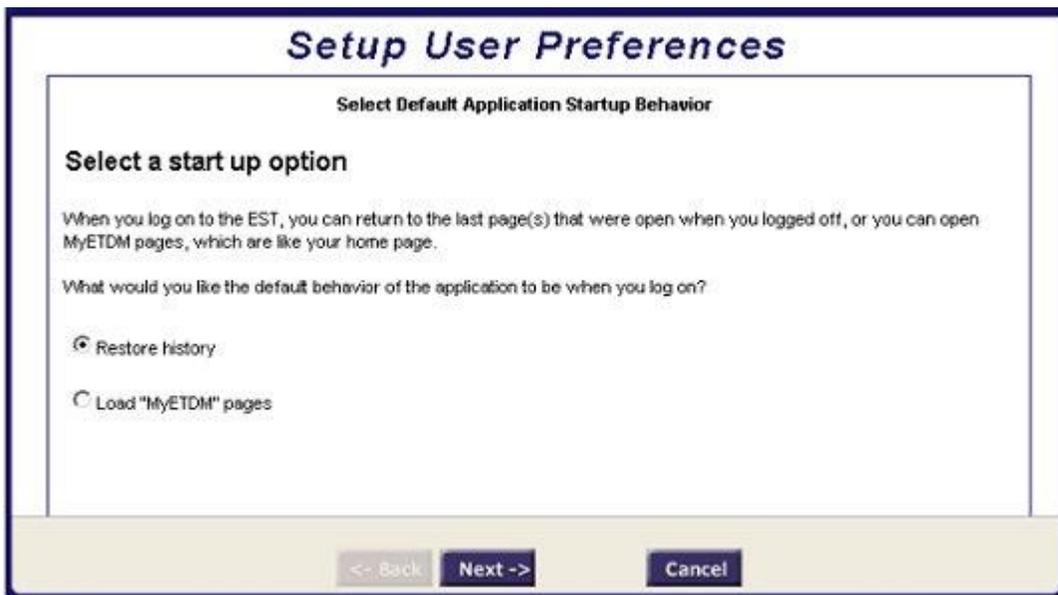
- Select a start-up option
- Add mini-reports to My ETDM
- Choose My ETDM pages
- Configure EST maps
- Change notification settings
- Update contact information

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.

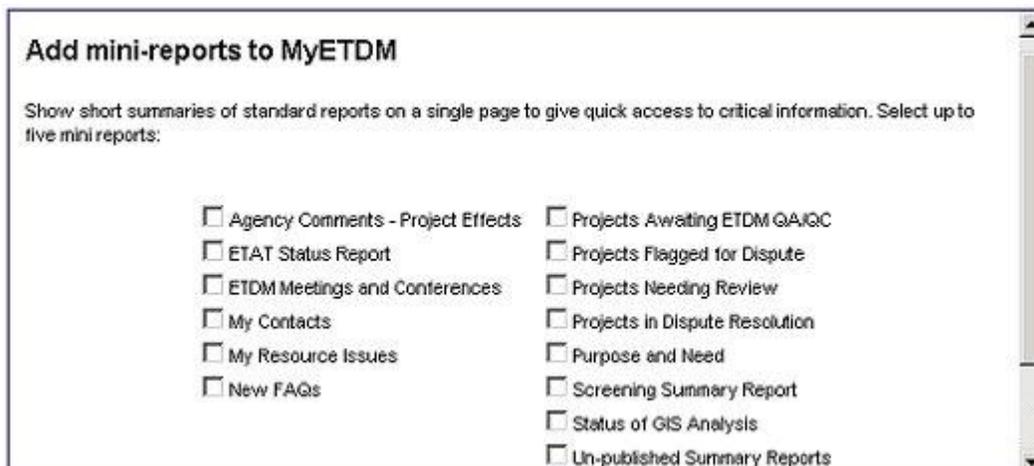
The first screen in the **Set Up User Preferences** wizard allows the user to select what will be displayed when they first log on to the EST. The two options are:

- **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.”

Click “Finish” to save

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.”

Update Contact Information

First Name: * required field

Middle Name:

Last Name: * required field

Email Address: * required field

Alternative Email Address:

Organization(s): FDOT District 1

Address 1:

Address 2:

City: State: Zipcode:

Direct Number: * required field Extension:

Office Number:

Fax Number:

Suncom Number:

Cell Number:

EST Username: charlotte_kelley

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.

Update Contact Information

User Input Received:

First Name: Charlotte
Middle Name:
Last Name: Kelley

Email Address: charlotte_kelley@urscorp.com
Alternative Email Address:

Address 1:
Address 2:
City:
State:
Zipcode:

Direct Number: (850) 402-6383 Extension:
Office Number: (850) 574-3197
Fax Number:
Suncom Number:
Cell Number:

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 <u>without</u> AN	✓	
AN Review	✓	✓

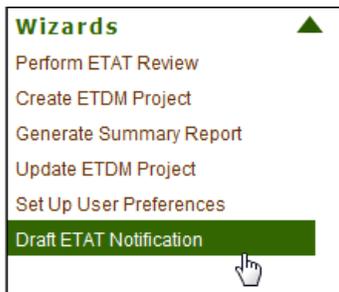
3.3.6.1 Accessing the Draft ETAT Notification Wizard

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**.

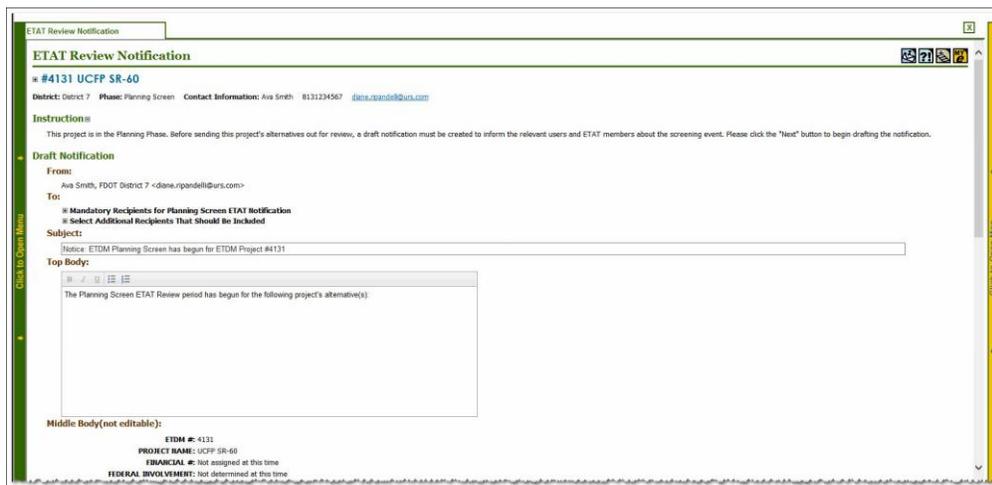


3. The window that opens next depends upon the selected project's phase (Planning or Programming). The sections that follow describe the process for drafting ETAT notifications for the following:

- [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.flia-etat.org

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

- 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
<input type="checkbox"/>	FDOT District 7	Severson, Joseph	test-FD7-joseph.severson-ou6904@devnull.flia-etat.org
<input checked="" type="checkbox"/>	FL Department of Environmental Protection	Branda, Robin	test-FDEP-robin.branda-ou2247@devnull.flia-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:

B I U [List Icon] [Link Icon]

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.flia-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:

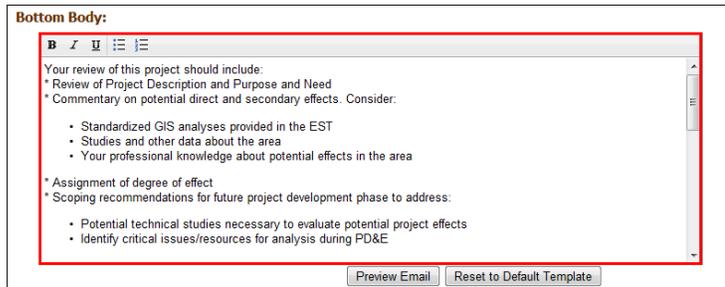
- Review period start and end dates
- Review period duration
- Water Management District assigned to review project
- Exempted Agencies

```

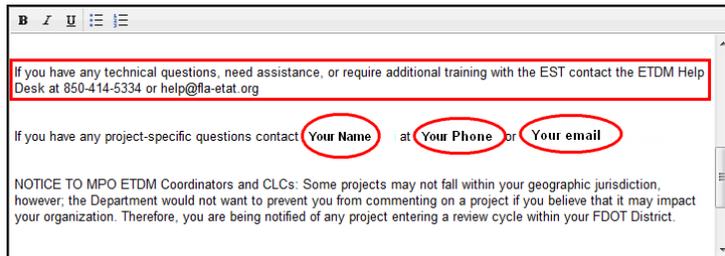
=====
The review period starts today [[START_DATE]], and will end in [[REVIEW_DURATION]], on [[END_DATE]].
=====
The following Water Management District(s) should review this project:
SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
=====
The following agencies have been identified as potentially exempted 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.

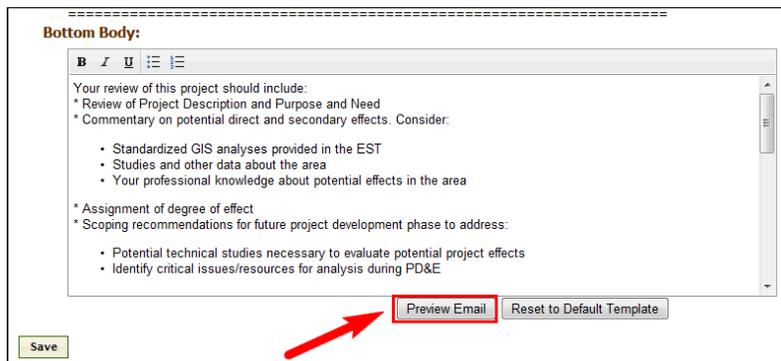


- Make any changes by typing—or copying and pasting—your edits directly into the text box. The formatting box becomes active after you click on the text box.

3.3.6.2.3 Previewing and Saving an Email

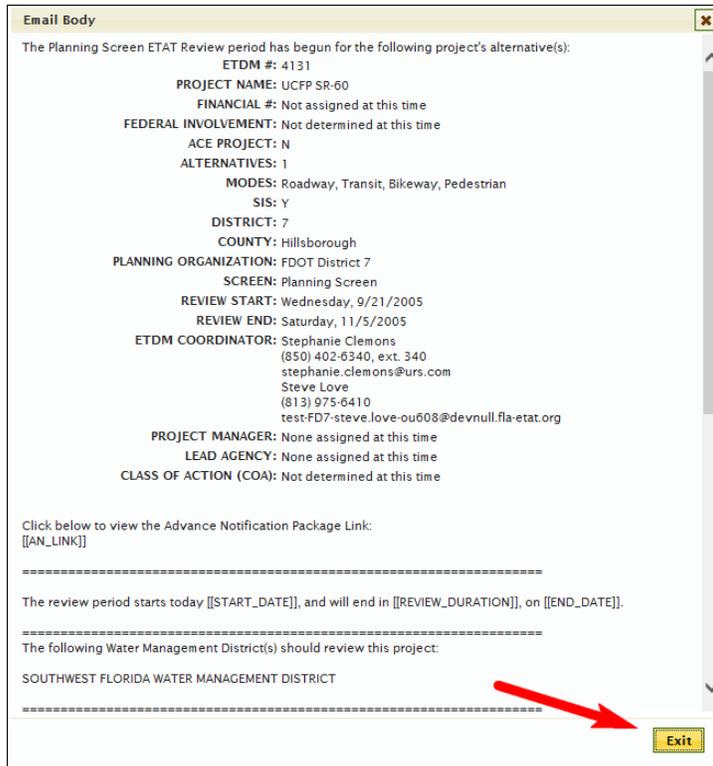
After you have completed the setup of the Draft ETAT Review Notification, you can review the email contents by doing the following:

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.

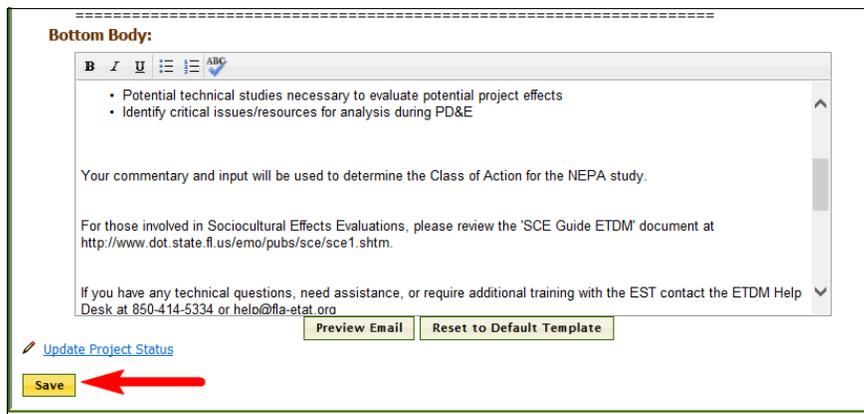
2. Click **Exit**.



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.

Bottom Body:

B *I* U

If you have any technical questions, need assistance, or require additional training with the EST contact the ETDM Help Desk at 850-414-5334 or help@fla-etat.org

If you have any project-specific questions contact Stephanie Clemons at 555-555-5555 or stephanie.clemons@urs.com

NOTICE TO MPO ETDM Coordinators and CLCs: Some projects may not fall within your geographic jurisdiction, however, the Department would not want to prevent you from commenting on a project if you believe that it may impact your organization. Therefore, you are being notified of any project entering a review cycle within your FDOT District.

[Update Project Status](#)

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:

Draft ETAT Notification

Draft ETAT Notification

#13027 Fowler Ave. Extension

District: District 7 Phase: Programming Screen Contact Information: Kirk Bogen (813) 975-6448 test.FD7.kirk.bogen.ou125@etdm.fl-etat.org

Instructions

This project is in Programming Screen.

This project previously completed an ETDM Planning Screen review on 03/10/2013. It has not been reviewed in an ETDM Programming Screen.

The draft notification email(s) need to be created.

These emails will be sent out to recipients when the Review period begins. The email text varies according to the type of notification. Recipients with EST access will only receive emails about projects within their assigned geographic areas (with the of MPO ETDM Coordinators and CLCs, who will be notified of any project entering a review cycle within their FDOT Districts).

This project is currently following the AN Review with Programming Screen process. This means the Advance Notification will be sent with the Programming Screen notification, and comments will be requested at that time.

Answer the following questions to help us provide you with the appropriate content for the notifications:

Do you want to start an ETDM Programming Screen review?

Yes No, only send the Advance Notification package.

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.

Draft ETAT Notification

Draft ETAT Notification

#13027 Fowlgr Ave. Extension

District: District 7 Phase: Programming Screen Contact Information: Kirk Bogen (813) 975-6448 test-FD7-kirk.bogen-ou135@devnull.fl-etdm.org

Instructions

This project is in Programming Screen.

This project previously completed an ETDM Planning Screen review on 03/10/2013. It has not been reviewed in an ETDM Programming Screen.

The draft notification email(s) need to be created.

These emails will be sent out to recipients when the Review period begins. The email text varies according to the type of notification. Recipients with EST access will only receive emails about projects within their assigned geographic areas (with the exception of MPO ETDM Coordinators and CLCs, who will be notified of any project entering a review cycle within their FDOT Districts).

This project is currently following the AN Review with Programming Screen process. This means the Advance Notification will be sent with the Programming Screen notification, and comments will be requested at that time.

Answer the following questions to help us provide you with the appropriate content for the notifications:

Do you want to start an ETDM Programming Screen review?

Yes No, only send the Advance Notification package.

Do you want to include the Advance Notification package with the ETDM Programming Screen review?

Yes No

You have selected the following types of federal involvement for this project:

- No Federal Involvement

Is that correct?

Yes No, let me change that

You have identified the following potential lead agency(ies):

- Federal Highway Administration

Is that correct?

Yes, continue No, let me change that

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.

Answer the following questions to help us provide you with the appropriate content for the notifications:
Do you want to start an ETDM Programming Screen review?

Yes No, only send the Advance Notification package.

You have selected the following types of federal involvement for this project:

- No Federal Involvement

Is that correct?

Yes No, [let me change that](#)

- 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.

Answer the following questions to help us provide you with the appropriate content for the notifications:
Do you want to start an ETDM Programming Screen review?

Yes No, only send the Advance Notification package.

You have selected the following types of federal involvement for this project:

- No Federal Involvement

Is that correct?

Yes No, [let me change that](#)

You have identified the following potential lead agency(ies):

- Federal Highway Administration

Is that correct?

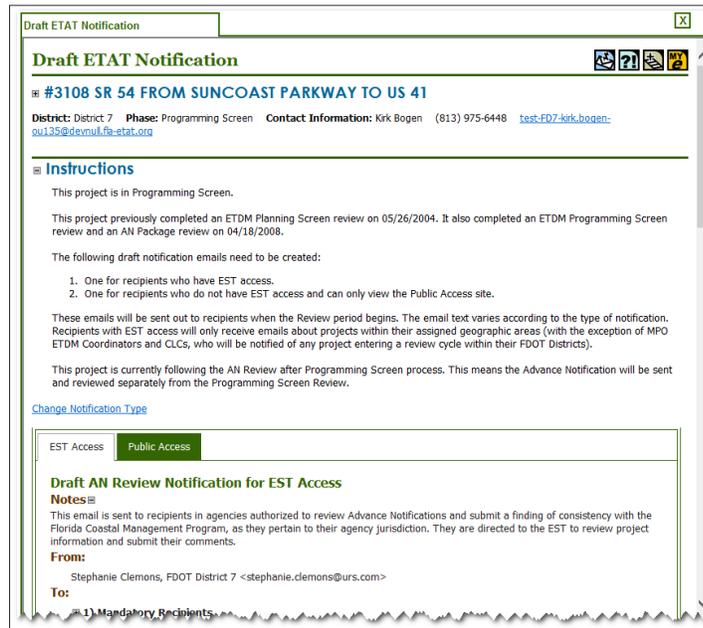
Yes, continue No, [let me change that](#)

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

- 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
<input type="checkbox"/>	OT District 7	Severson, Joseph	test-FD7-joseph.severson-ou6904@devnull.fl.a-etat.org
<input checked="" type="checkbox"/>	FL Department of Environmental Protection	Branda, Robin	test-FDEP-robin.branda-ou2247@devnull.fl.a-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.

Subject:

Notice: ETDM Programming Screen has begun for ETDM Project #13027

Top Body:

B I U  

[The ETDM Programming Screen and the Florida State Clearinghouse federal consistency review period have begun for the following project. This notice also constitutes the Advance Notification in accordance with Presidential Executive Order 12372. Please review instructions below and then proceed to the Environmental Screening Tool to submit your comments at:
www.fl.a-etat.org

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.

Middle Body (not editable):

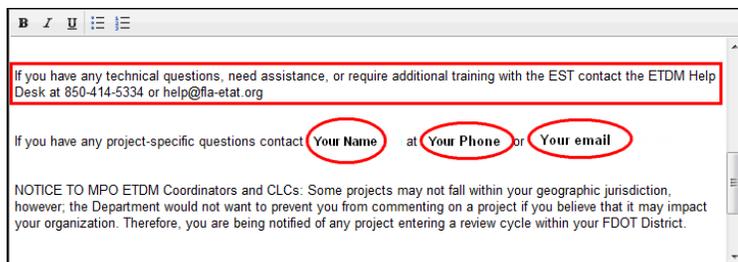
ETDM #: 13027
 PROJECT NAME: Fowler Ave. Extension
 FINANCIAL #: Not assigned at this time
 FEDERAL INVOLVEMENT: Federal Funding
 ACE PROJECT: Y
 ALTERNATIVES: 1, 2, 4, 5
 MODES: Roadway
 SIS: N
 DISTRICT: 7
 COUNTY: Hillsborough
 PLANNING ORGANIZATION: FDOT District 7
 SCREEN: Programming Screen
 ETDM COORDINATOR: Stephanie Clemons
 (850) 402-6340, ext. 340
 stephanie.clemons@urs.com
 Steve Love
 (813) 975-6410
 test-FD7-steve.love-ou608@devnull.flc-etat.org
 PROJECT MANAGER: Kirk Bogen
 (813) 975-6448
 test-FD7-kirk.bogen-ou135@devnull.flc-etat.org
 LEAD AGENCY: None assigned at this time
 CLASS OF ACTION (COA): Not determined at this time

Click below to view the Advance Notification Package Link:
 [[AN_LINK]]
 =====
 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

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.

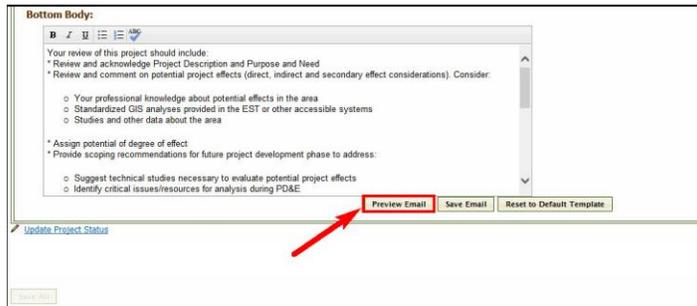


- Make any changes by typing—or copying and pasting—your edits directly into the text box. The formatting box becomes active after you click on the text box.

3.3.6.3.4 Previewing and Saving an Email

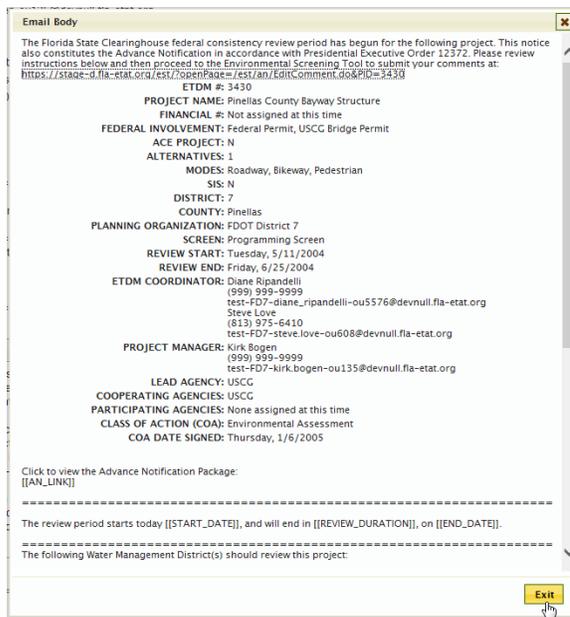
After you have completed the setup of the Draft ETAT Notification, you can review the email contents by doing the following:

- 1. Click Preview Email.**



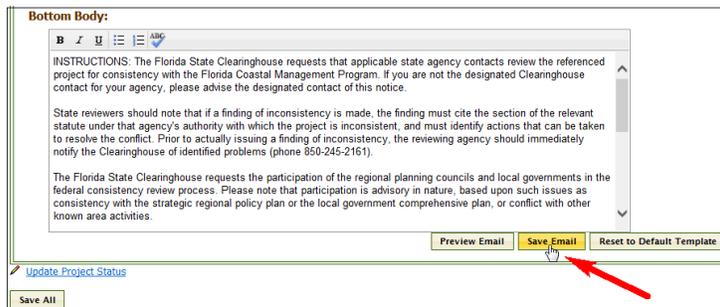
The **Email Body** screen displays, allowing you to view the email in the format that will be displayed to the recipients.

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.

The screenshot shows a web form titled "Bottom Body:" with a rich text editor. The text inside the editor reads: "Desk at 850-414-5334 or help@fla-etat.org. If you have any project-specific questions contact Stephanie Clemons at 555-555-5555 OR stephanie.clemons@urs.com. Thank you. Stephanie Clemons, Clemons, Stephanie, FDOT District 7, 555-555-5555". Below the editor are three buttons: "Preview Email", "Save Email", and "Reset to Default Template". Below the entire form is a link "Update Project Status" and a yellow "Save All" button with a red arrow pointing to it.

3.3.6.3.6 Updating the Project Status

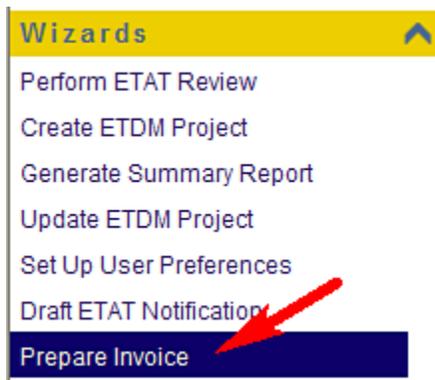
The **Draft ETAT Notification** tool provides easy access to the **Update Project Status** form, where you can move an alternative's status to **ETAT Review**.

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

The screenshot shows a web form titled "Bottom Body:" with a rich text editor. The text inside the editor reads: "INSTRUCTIONS: The Florida State Clearinghouse requests that applicable state agency contacts review the referenced project for consistency with the Florida Coastal Management Program. If you are not the designated Clearinghouse contact for your agency, please advise the designated contact of this notice. State reviewers should note that if a finding of inconsistency is made, the finding must cite the section of the relevant statute under that agency's authority with which the project is inconsistent, and must identify actions that can be taken to resolve the conflict. Prior to actually issuing a finding of inconsistency, the reviewing agency should immediately notify the Clearinghouse of identified problems (phone 850-245-2161). The Florida State Clearinghouse requests the participation of the regional planning councils and local governments in the federal consistency review process. Please note that participation is advisory in nature, based upon such issues as consistency with the strategic regional policy plan or the local government comprehensive plan, or conflict with other known area activities." Below the editor are three buttons: "Preview Email", "Save Email", and "Reset to Default Template". Below the entire form is a link "Update Project Status" and a yellow "Save All" button with a red arrow pointing to it.

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  button at the bottom of the screen.

Invoice Wizard

Select an Agency & Agreement and create a new or edit an existing Invoice

Agency:

Agreement:

Invoice:

Invoicing Period Start:

Invoicing Period End: 

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 <input type="button" value="Calendar"/>

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	<input type="text" value="0"/>	Total Cost	\$0.00	
Overhead %	<input type="text" value="0"/>	Total w/Overhead	\$0.00	<input type="button" value="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	<input type="text" value="0"/>	<input type="text" value="0"/>	\$0.00	<input type="button" value="Remove"/>
Additional Overhead Amount	<input type="text" value="0"/>	Total Cost	\$0.00	
Overhead %	<input type="text" value="0"/>	Total w/Overhead	\$0.00	<input type="button" value="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	
<input type="text"/>	<input type="text" value="0"/>	Not listed (pick later) ▾	<input type="button" value="Remove"/>
Total Cost	\$0.00		<input type="button" value="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	
<input type="text"/>	<input type="text" value="0"/>	Not listed (pick later) ▾	<input type="button" value="Remove"/>
Total Cost	\$0.00		<input type="button" value="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
<input type="text"/>	<input type="text" value="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.

Totals	
Total Cost For Entire Invoice	\$0.00
Additional Notes:	
<input type="text"/>	
<input type="button" value="Save Draft"/>	

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).

Summarize Agency Activities

Select an Organization and Master Agreement/Contract	
Agency:	US Environmental Protection Agency
Existing Agreements	xyz098 on 04/30/2008
Load an unsubmitted invoice	#3: ending on 04/11/2008
Currently editing Invoice #3.	
Invoicing Period Start(from previous invoice)	Invoicing Period End
03/08/2008	<input type="text" value="04/11/2008"/>

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.

- Accomplishments Made During Period	
Administrative or Supervision Tasks	
<input type="text"/>	
Coordination	
<input type="text"/>	
Performance Measures	
<input type="text"/>	
Problems Encountered/Suggestions for Improvement	
<input type="text"/>	

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.

Summary of ETDM Screening Activities	
Problems or Issues Encountered using the Environmental Screening Tool	
<input type="text"/>	
Other Comments	
<input type="text"/>	

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.”

Anticipated Accomplishments for Next Period

Description of Activities

Total Staff Hours Anticipated	0
Total Number of People Involved	0

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.

Log Agency Activity

Select an agency and start a new or edit an existing Activity Log

Agency	FDOT District 3		
Load/Edit Existing	--No Activity Logs exist for this Agency--		<input type="button" value="Load"/>
	<input type="button" value="delete"/>		
Clear/Create New	Editing a new Activity Log		

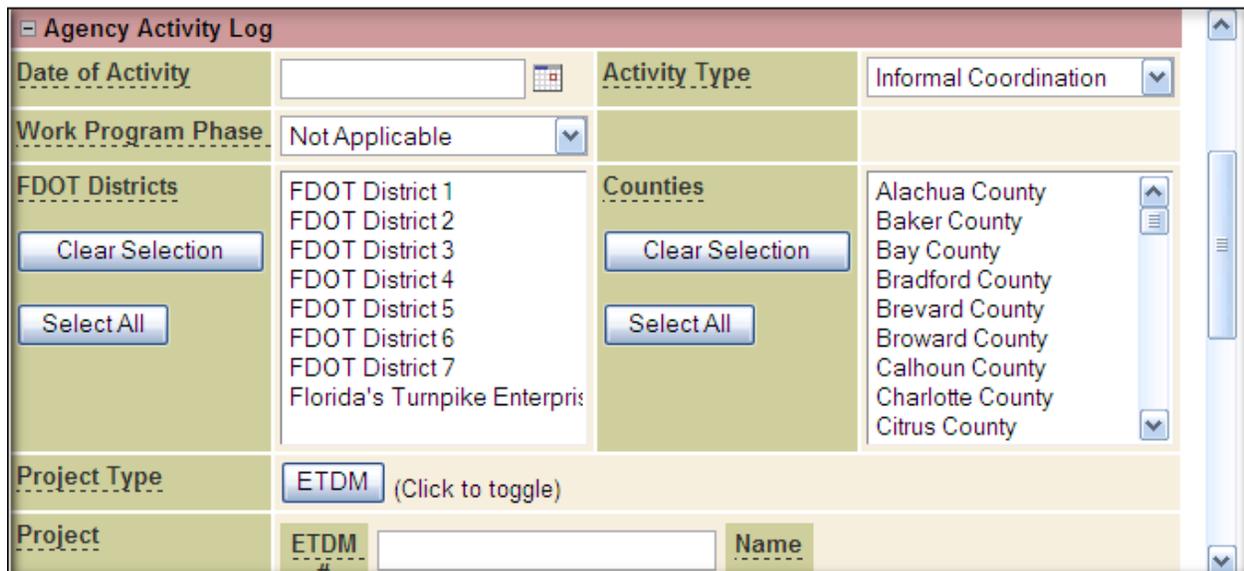
Agency Activity Log

Date of Activity		Activity Type	Informal Coordination
Work Program Phase	Not Applicable		
FDOT Districts	FDOT District 1 FDOT District 2	Counties	Alachua County Baker County

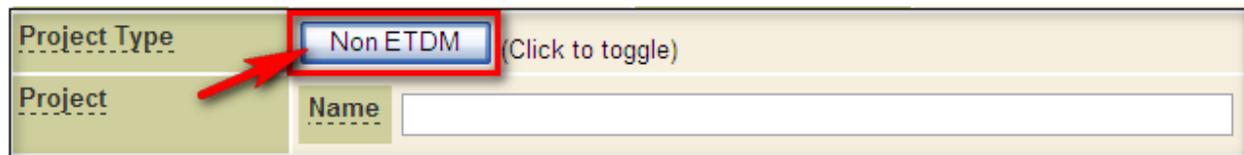
Agency activities are entered during this step using the Prepare Invoice wizard, or may be entered at any time by an agency ETAT representative using the Log Agency Activity tool found on the main menu under Invoicing Tools in the Tools menu.

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.,"

Activity Description

Results or Anticipated Actions

Save

Back Next Finish

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.

Organization and Master Agreement/Contract and Invoice	
Agency:	US Environmental Protection Agency
Agreement:	xyz098 on 01/01/2008
Invoices:	Invoice 3, ending on 04/11/2008

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.

Assigning Hours for Invoice 3			
Project Activity	All projects for this invoice have hours assigned to them <input type="button" value="Add"/>		
Offline Activity	All off-line activities that were logged for this invoice have hours assigned to them <input type="button" value="Add"/>		
<input type="button" value="Save All"/>	Activity	Activity Type	Hours
<input type="button" value="Delete"/> <input type="button" value="Save"/>	3869 - US 27 Add Lanes (Unsaved)	Project	<input type="text" value="2"/>
<input type="button" value="Delete"/> <input type="button" value="Save"/>	2807 - J Turner Butler Blvd (SR 202)East (Saved)	Project	<input type="text" value="0"/>
<input type="button" value="Delete"/> <input type="button" value="Save"/>	10073 - Eliminated Alternative Demo Project (Saved)	Project	<input type="text" value="0"/>
<input type="button" value="Delete"/> <input type="button" value="Save"/>	9994 - TEST: Stephanie II 03/11/2008 (Saved)	Project	<input type="text" value="0"/>
<input type="button" value="Delete"/> <input type="button" value="Save"/>	10114 - Eliminated Alt Demo #2 (Saved)	Project	<input type="text" value="0"/>
Total hours accounted for			2
Total hours invoiced			0
Hours not accounted for			0
<input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Finish"/>			

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.	

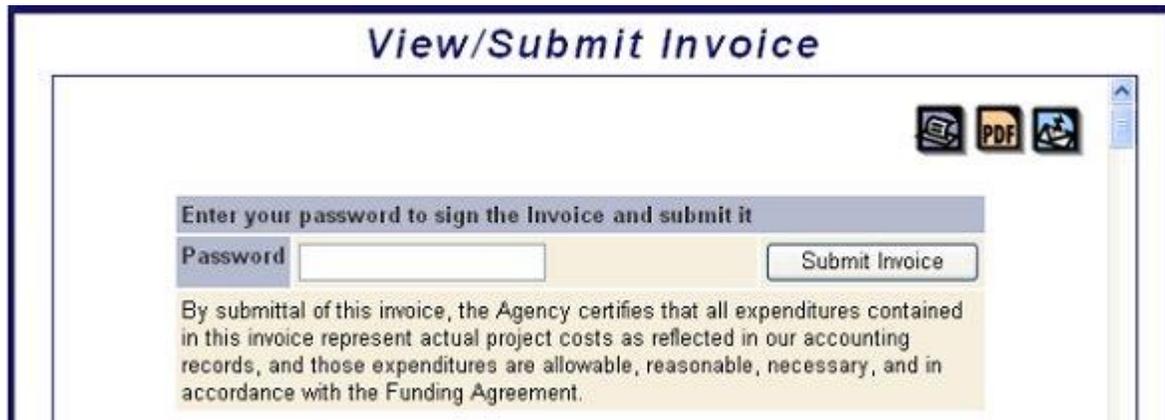
Attachments
<ul style="list-style-type: none"> Test Receipt 04/08/2008

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."



View/Submit Invoice





Enter your password to sign the Invoice and submit it

Password

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.

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.



Prepare Advance Pay Request

Select an Organization, Master Agreement/Contract and Invoice.

Agency:	Northwest Florida Water Management District
Selected Agreement	1-082909 ending 07/11/2003
Selected Invoice	#15: ending on
Invoicing Period Start(from previous invoice)	Invoicing Period End
08/30/2008	09/26/2008

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	<input type="text" value="0"/>
Expenses	Actual Expenditures	<input type="text" value="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	<input type="text"/>
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 certifies that this is a reasonable estimate of the work to be performed as described in Attachment A (Project Report)	
<input type="button" value="Save"/>	
<input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="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  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."

View/Submit Invoice

Print PDF Email

Enter your password to sign the Invoice and submit it

Password

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.

Advance Pay Request Report

Agency: Northwest Florida Water Management District