



# Florida Department of TRANSPORTATION

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## Materials Acceptance and Certification (MAC) Independent Assurance Program Maintenance User Manual

October 5, 2016

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## Introduction

### Who is the FDOT Independent Assurance Program Maintenance User?

The Independent Assurance (IA) Program Maintenance user is a person working for the District Materials or State Materials Office who manages the Independent Assurance Program requirements and performs IA evaluations. These instructions describe the functions performed by the IA Program Maintenance User in MAC.

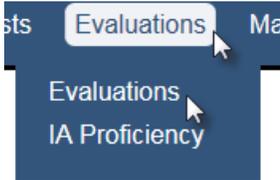
There are four types of IA evaluations; observation, split sample, observation/split sample and proficiency sample. The requirements for the Independent Assurance Program are contained in the Materials Manual. These instructions are intended to cover the MAC functionality related to the Materials Manual, not supersede or replace the program requirements. If there is a conflict between the Materials Manual procedure and these instructions, the Materials Manual takes precedence.

An IA evaluator conducting an evaluation can enter the data into the system directly if he has a device with internet connectivity. Or the reports can also be printed so that the evaluation can be documented manually and the results entered when the evaluator returns to the office. If the evaluation is conducted using hard copy checklists, the completed checklists should be attached to the evaluation record in MAC. If you wish to do this, you must first create the evaluation record in MAC, generate the checklists, and then print the checklists. Later, when the checklists are completed manually, return to the evaluation record and record the results on the evaluation record. To print the checklists, see **G. Printing Multiple Checklists**.

## Chapter 1 – Creating an Observation Evaluation on a Laboratory Qualification

The create evaluation dialog screens are slightly different on a laboratory qualification area (like Concrete Lab Level I) and a field qualification area (like Concrete Field Level I).

To create an observation evaluation on a laboratory qualification:

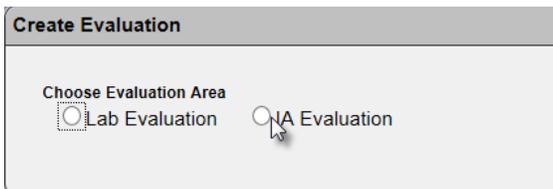


1. Click on the Evaluations menu option.
2. Click on the Evaluations option on the submenu.



3. Click on the Create Evaluation page level action.

A Create Evaluation dialog box will appear. The same dialog box is used for laboratory evaluations under the Laboratory Qualification Program and technician evaluations under the Independent Assurance Program, so you must select the evaluation area to indicate if it is for a laboratory or a technician.



4. Select the IA Evaluation option.

The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.

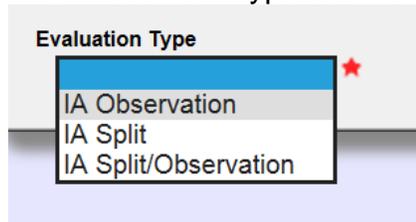


5. Click on the drop down to select the appropriate qualification area, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is

because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. **See XXXX – Managing Strikes**

The Evaluation Type selection field will appear.



6. Select the IA Observation option from the drop down list.

A screenshot of a web form for an evaluation. The form includes several fields with numbered callouts: 1. 'Choose Evaluation Area' with radio buttons for 'Lab Evaluation' and 'IA Evaluation' (selected). 2. 'Qualification Area' dropdown menu set to 'Aggregate Testing Technician'. 3. 'Evaluation Type' dropdown menu set to 'IA Observation'. 4. 'Evaluation District' dropdown menu set to '7'. 5. 'Lab Being Evaluated' search field with callout 8. 6. 'Evaluator' search field with callout 9. 7. 'Technician Type' dropdown menu with callout 10. 8. 'Technician' search field with callout 11. 9. 'Technician's Email' search field with callout 12. 10. 'Supervisor's Email' search field with callout 13. Red stars are present next to several fields.

7. Enter the District of the Evaluator.

8. Enter the Laboratory where the technician is located. If there is a failing test step on an equipment checklist, it will generate an LQPR for this laboratory.

9. Enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

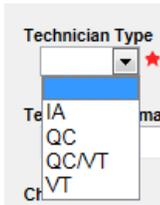
A screenshot showing the results of an evaluator search. The 'Evaluator' field contains 'Susan Musselman [M24578064]' and an 'x' icon. To the right, the 'Is Evaluator Qualified?' field is set to 'No'.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR:** Evaluator is not Qualified for this Qualification Area

10. Select the Technician Type. This selection assists with the required recipients when the report is generated.



- a. Select IA if a State Materials Office (SMO) IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

11. Enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

Technician Type	Technician	Is Technician Qualified?
QC	Susan Musselman [M24578064]	No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

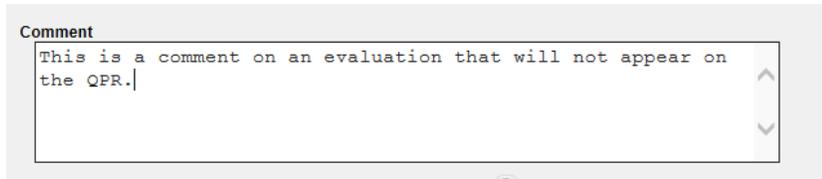
12. Enter the technician’s email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.
13. Enter the technician’s supervisor’s email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. MAC will not send an email notification for undelivered emails.

Checklists

- Select All
- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Equipment]
- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Procedure]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Equipment]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Procedure]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Equipment]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 002 - Sampling Aggregates [Procedure]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75-µm No. 200 Sieve [Equipment]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75-µm No. 200 Sieve [Procedure]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Equipment]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Procedure]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Equipment]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Equipment]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Procedure]

14. Select the appropriate checklists from the master list. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

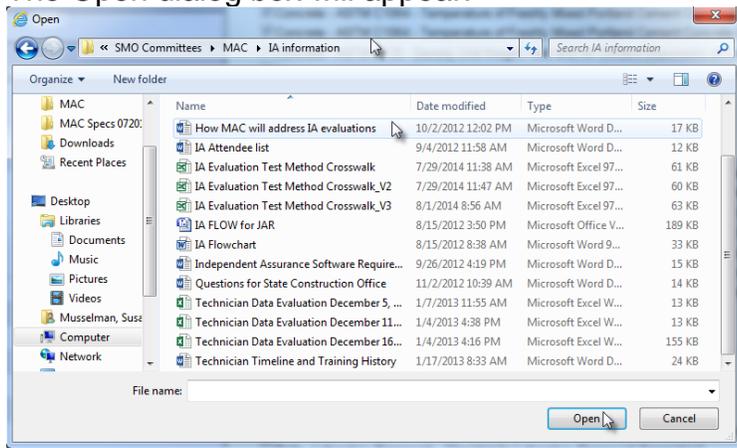


15. If desired, you can enter comments in the comments field. These will not appear on the QPR.



- 16. You may also attach a document to the evaluation.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document. The Open dialog box will appear.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.



- c. Navigate to the location where the document is stored.
    - d. Click on the document to select it.
    - e. Click on the Open option to upload the document to the evaluation. The document will appear as attached to the evaluation.
    - f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



17. Click on the Save option to create the evaluation.

You will receive an message that the evaluation was successfully created.

Create Evaluation was successful

## Chapter 2 – Creating an Observation Evaluation on a Field Qualification

The create evaluation dialog screens are slightly different on a laboratory qualification area (like Concrete Lab Level I) and a field qualification area (like Concrete Field Level I)

To create an observation evaluation on a laboratory qualification:

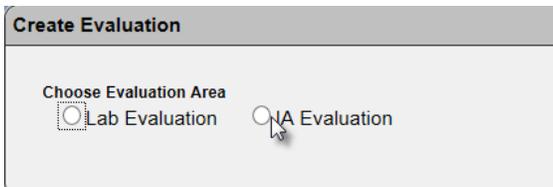


1. Click on the Evaluations menu option.
2. Click on the Evaluations option on the submenu.



3. Click on the Create Evaluation page level action.

A Create Evaluation dialog box will appear. The same dialog box is used for laboratory evaluations under the Laboratory Qualification Program and technician evaluations under the Independent Assurance Program, so you must select the evaluation area to indicate if it is for a laboratory or a technician.



4. Select the IA Evaluation option.

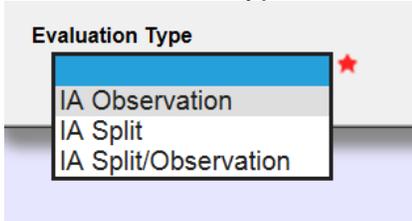
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. Click on the drop down to select the appropriate qualification area, for example, Concrete Field Level I.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. **See XXXX – Managing Strikes**

The Evaluation Type selection field will appear.



6. Select the IA Observation option from the drop down list.

A screenshot of a web form for evaluation. The form includes several fields with numbered callouts: 1. 'Choose Evaluation Area' with radio buttons for 'Lab Evaluation' and 'IA Evaluation'. 2. 'Qualification Area' dropdown menu showing 'Concrete Field Technician Level I'. 3. 'Evaluation Type' dropdown menu with 'IA Observation' selected. 4. 'Evaluation District' dropdown menu with '7' selected. 5. 'Evaluator' search field with '8' and a red star. 6. 'Technician Type' dropdown menu with '9' and a red star. 7. 'Technician' search field with '10' and a red star. 8. 'Technician's Email' field with '11' and a red star. 9. 'Supervisor's Email' field with '12' and a red star.

7. Enter the District of the Evaluator.

8. Enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

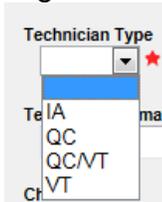
A screenshot of the 'Evaluator' search results. The search field contains 'Susan Musselman [M24578064]' and a red 'x' icon. To the right, the 'Is Evaluator Qualified?' field shows 'No'.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR:** Evaluator is not Qualified for this Qualification Area

9. Select the Technician Type. This selection assists with the required recipients when the report is generated.



- Select IA if a State Materials Office (SMO) IA evaluator is evaluating another IA evaluator.
- Select QC when the technician being evaluated only performs QC sampling and/or testing.
- Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.

d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

10. Enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

Technician Type	Technician	Is Technician Qualified?
QC	Susan Musselman [M24578064] *	No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

11. Enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

12. Enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. MAC will not send an email notification for undelivered emails.

Checklists

- Select All
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Procedure]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Equipment]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Procedure]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Equipment]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Procedure]
- Concrete - ASTM C172 - Sampling Freshly Mixed Concrete [Equipment]
- Concrete - ASTM C172 - Sampling Freshly Mixed Concrete [Procedure]
- Concrete - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method [Equipment]
- Concrete - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method [Procedure]
- Concrete - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method [Equipment]
- Concrete - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method [Procedure]
- Concrete - ASTM C31 - Making and Curing Concrete Test Specimens in the Field [Equipment]
- Concrete - ASTM C31 - Making and Curing Concrete Test Specimens in the Field [Procedure]
- Concrete - FM 5-501 - Water Cementitious Ratio [Procedure]

13. Select the appropriate checklists from the master list. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

Comment

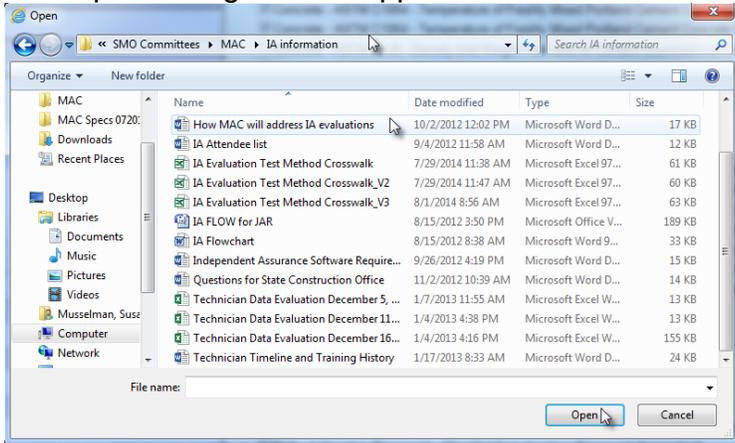
This is a comment on an evaluation that will not appear on the QPR.

14. If desired, you can enter comments in the comments field. These will not appear on the QPR.



15. You may also attach a document to the evaluation.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document. The Open dialog box will appear.
    - a. Type in a description of the document, if desired.
    - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.

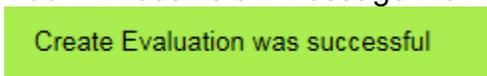


- c. Navigate to the location where the document is stored.
        - d. Click on the document to select it.
        - e. Click on the Open option to upload the document to the evaluation. The document will appear as attached to the evaluation.
        - f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



16. Click on the Save option to create the evaluation.

You will receive an message that the evaluation was successfully created.



## Chapter 3 – Performing an Observation Evaluation on a Field or Laboratory Technician

Performing an observation for a field technician and lab technician have the same functions.

### A. Updating an Observation Evaluation

Once an evaluation is created, you can update the evaluation record, if needed.



1. Select the Update option.

An Update dialog box will appear. You can update the Technician Type and the Qualification Area.

A screenshot of an "Update" dialog box. It contains three dropdown menus: "Evaluation District" with "SMO" selected, "Technician Type" with "IA" selected, and "Qualification Area" with "Concrete Field Technician Level I" selected. A "Save" button is located at the bottom center.

2. Update the fields as appropriate.

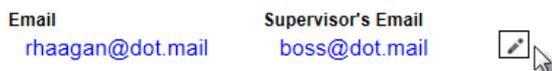
3. Select the Save option to save the updates.

You will receive a message that the evaluation was successfully updated.

Update Evaluation was successful

### B. Updating Evaluation Emails

To update the email information on an evaluation:



1. Select the Update Emails icon (✎).

An Update Emails dialog box will appear.

A screenshot of an "Update Technician Emails" dialog box. It features two text input fields: "Email" with "employee@dot.mail" and "Supervisor's Email" with "boss@dot.mail". Each field has a small "x" icon to its right. A "Save" button is positioned at the bottom center.

2. Update either or both emails.

3. Select Save to save the updated emails.

You will receive a message the the emails were successfully updated.

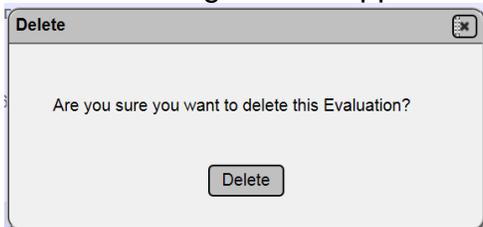
Update Technician Emails was successful

### C. Deleting an Observation Evaluation

Update Delete

1. Select the Delete option.

A Delete dialog box will appear.



2. Select the Delete option to delete the evaluation record.

You will receive a message that the evaluation was successfully deleted.

Delete Evaluation was successful

**NOTE:** You cannot delete an evaluation record if you have generated a QPR.

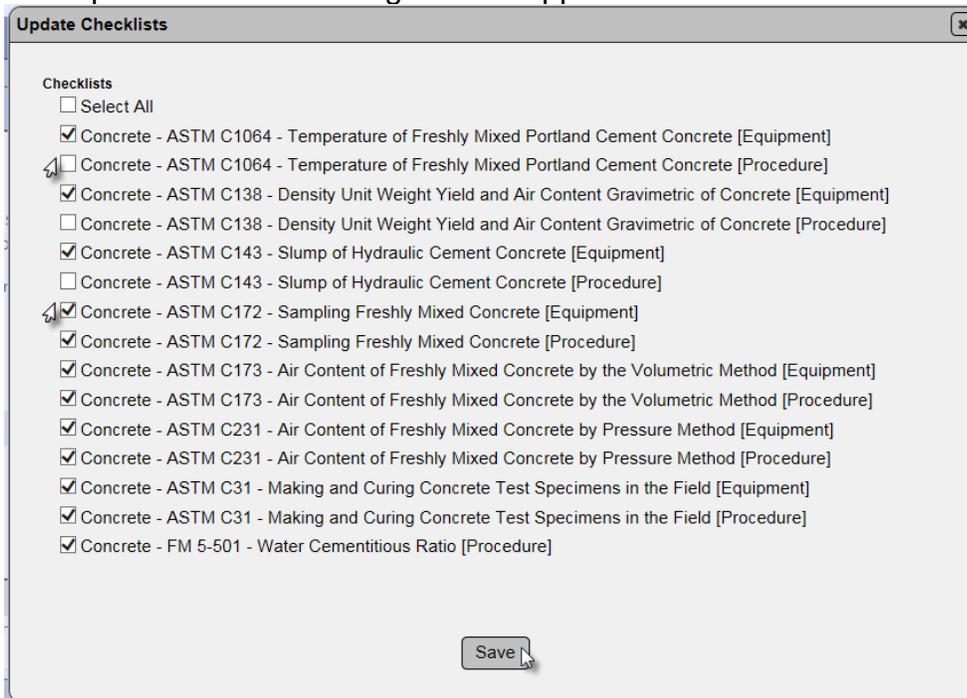
### D. Updating the Checklists on an Evaluation

If you need to update the checklists assigned to the evaluation:

Update Checklists Complete Multiple Checklists Print Multiple Checklists

1. Select the Update Checklists option.

The Update Checklist dialog box will appear.



2. Assign missing checklists by clicking on the selection box next to the checklist title. Deselect checklists with a selection box checked to remove them from the evaluation.
3. When complete, click on the Save option to revise the checklists on the evaluation.

You will receive a message that the checklists were successfully updated.



## E. Performing a Single Checklist

The checklists on an evaluation may be completed individually or more than one at a time. To perform one of the checklists:

Concrete			
Temperature of Freshly Mixed Portland Cement Concrete	ASTM C1064	In Progress	<a href="#">Perform Checklist</a>
Density Unit Weight Yield and Air Content Gravimetric of Concrete	ASTM C138	In Progress	<a href="#">Perform Checklist</a>

1. Select the Perform Checklist option next to the specific checklist you wish to complete.

A Perform Checklist dialog box will appear.

ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]

	P	F	N/A
<b>Container</b>			
1. Container shall be large enough to provide at least 3 inches [75 mm] of concrete in all directions around the sensor of the temperature measuring device; concrete cover must also be at least three times the nominal maximum size of the coarse aggregate.	✓	○	○
<b>Temperature Measuring Device</b>			
2. Shall be capable of accurately measuring the temperature of freshly mixed concrete to $\pm 1^\circ\text{F}$ [ $\pm 0.5^\circ\text{C}$ ] throughout a range of $30^\circ$ to $120^\circ\text{F}$ [ $0^\circ$ to $50^\circ\text{C}$ ].	✓	○	○
3. The design of the temperature measuring device shall be such that it allows 3 inches [75 mm] or more immersion during operation	✓	○	○
4. Partial immersion liquid-in-glass thermometers and possibly other types shall have a permanent mark to which the device must be immersed without applying a correction factor.	✓	○	○
5. Reference temperature measuring device shall be readable and accurate to $\pm 0.5^\circ\text{F}$ [ $0.2^\circ\text{C}$ ] at the verification points at two temperatures at least $30^\circ\text{F}$ [ $15^\circ\text{C}$ ] apart. A certificate or report that verifies the accuracy shall be available in the laboratory for review.	✓	○	○

**Remarks**

This is a remark on a specific checklist. It will not appear on the QPR>

Date  IA Observer

2. Observe the technician performing each step.
  - a. If the technician successfully completes the step no action needs to be taken on the checklist.
  - b. If the technician fails to successfully complete the step, change the step indicator from P to F.
  - c. If the step does not apply, change the step indicator from P to N/A.
3. Enter remarks in the remarks field, if desired. These do not show on the QPR.
4. If the checklist is completed on a date different from the date the evaluation was generated, change the date to the appropriate date.
5. To save your work and return to the checklist at a later time, select the Save option. The checklist status will remain "In Progress".
6. To complete the checklist and submit it for generating the QPR, select the Submit option.

You will receive a message that the checklist was successfully completed.

Perform Checklist was successful

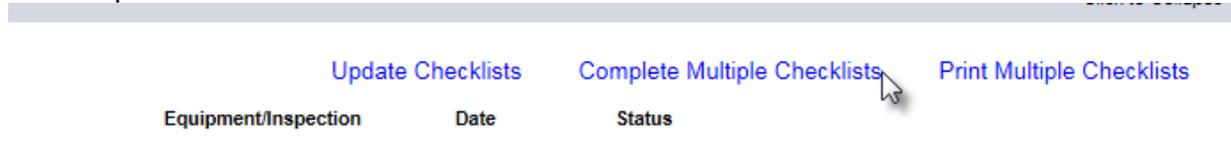
The checklist status will change to either “Passed” if all steps are P or P and N/A or “Failed” if any steps are failed.

If any required fields are missing and the Submit option is selected, you will be warned and the specific missing fields will be listed.

**ERROR: IA Observer is required**

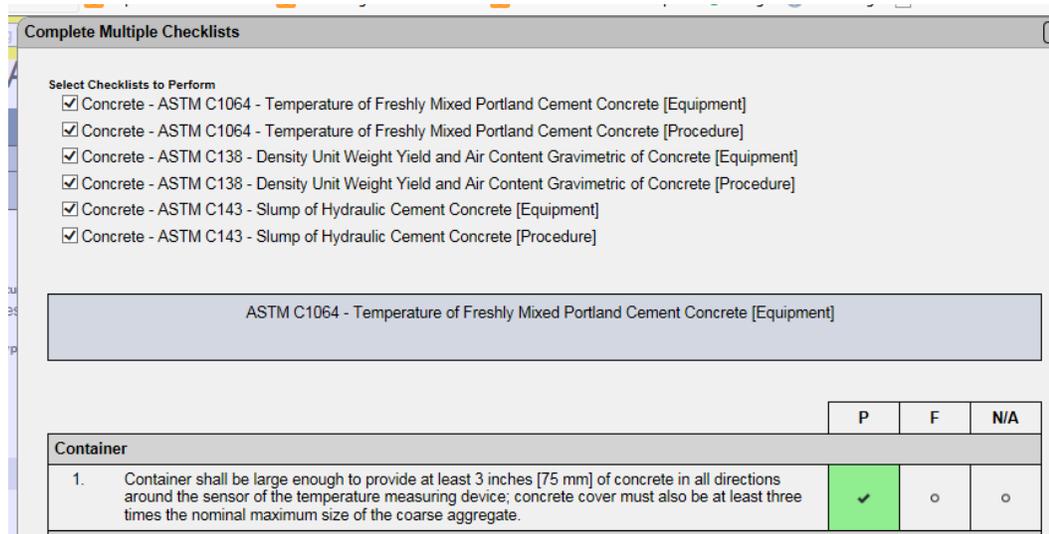
## F. Completing Multiple Checklists

To complete more than one checklist at a time:



1. Select the Complete Multiple Checklists option.

A Complete Multiple Checklists dialog box will appear with all the checklists on the evaluation selected.



2. If you are going to perform all checklists, leave all the boxes checked.

3. If you are not going to perform all checklists, deselect the checklists you are not going to perform. This may be due to another IA evaluator completing them or you will be returning the next day to complete them.

4. Observe the technician performing each step on the first checklist.

a. If the technician successfully completes the step no action needs to be taken on the checklist.

b. If the technician fails to successfully complete the step, change the step indicator from P to F.

c. If the step does not apply, change the step indicator from P to N/A.

Remarks

Date 12/1/2015 IA Observer Type Technician Name or \*

5. Enter remarks in the remarks field, if desired. These do not show on the QPR.
6. If the date of the checklist is different from the date the evaluation was created, change the date field.
7. You must supply the IA observer on the first checklist.
8. Continue completing each checklist.

Use the Footer Info from First Checklist

Date 11/25/2014 IA Observer

9. After the first checklist you have the option to use the Footer from the First Checklist. If this box is selected the date and IA observer entered will be used on that checklist. If it is not, you will have to supply the IA Observer and the date. This is done when more than one IA Observer performs the same evaluation.

Save Submit

10. To save your work and return to the checklist at a later time, select the Save option. The checklists statuses will remain “In Progress”.
11. To complete the checklists and submit them for generating the QPR, select the Submit option. The checklist statuses will change to either “Passed” if all steps are P or P and N/A or “Failed” if any steps are failed.

If any required fields are missing and the Submit option is selected, you will be warned and the specific missing fields will be listed.

ERROR: IA Observer is required

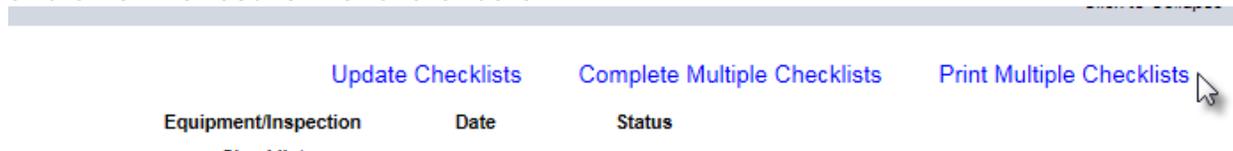
**NOTE:** The Date field cannot be in a future date.

If all required fields are present and no other errors are presented, you will receive a message that the Perform checklist was successful.

Perform Checklist was successful

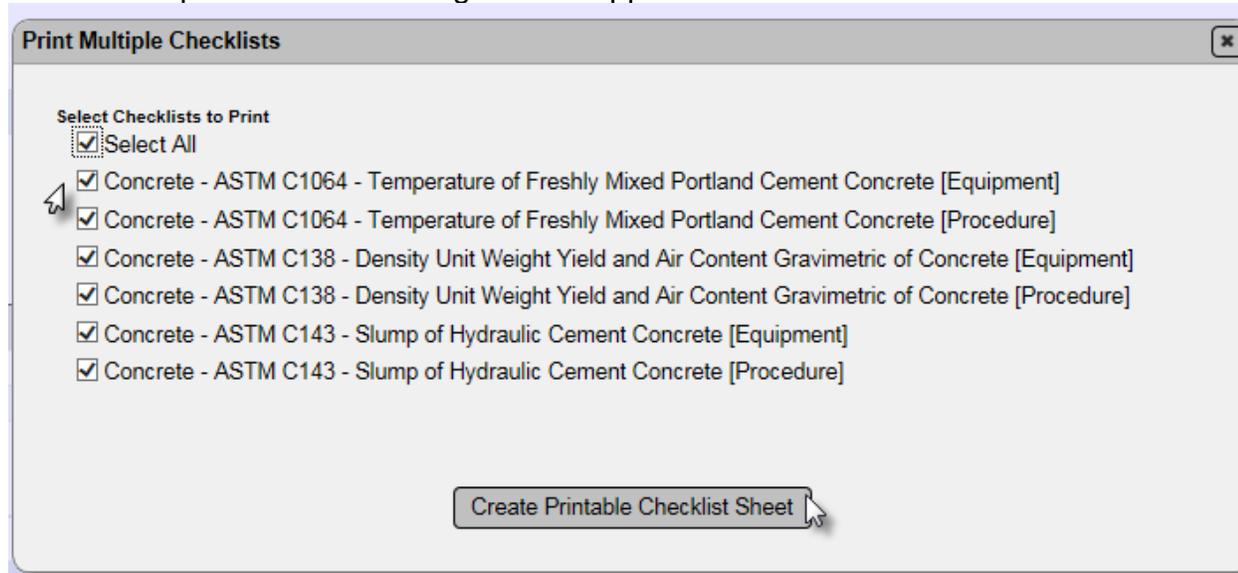
## G. Printing Multiple Checklists

You can print the checklists on an evaluation record if you need to perform the evaluation manually and enter the results in at a later date.



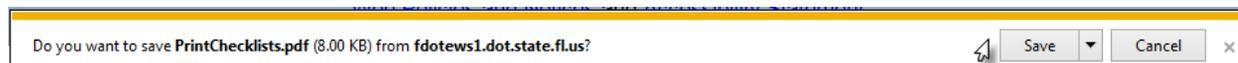
Select the Print Multiple Checklists option.

A Print Multiple Checklists dialog box will appear.



2. To print all the checklists on the inspection record, leave the checkboxes selected. To print only some of them, deselect the checklists you don't want to print.

3. Select the Create Printable Checklist Sheet option.



4. Select the Save option to save the download and open it.



5. Select the Open option to open the printable hard copies in pdf format.

The reports will open in a program that will read pdf formats, for example, Adobe Reader. You can print the reports by using the program's print function.

## Chapter 4 – Creating a Split Sample Evaluation on a Laboratory Qualification

The create evaluation dialog screens are slightly different on a laboratory qualification area (like Concrete Lab Level I) and a field qualification area (like Concrete Field Level I)

To create a split sample evaluation on a laboratory qualification:

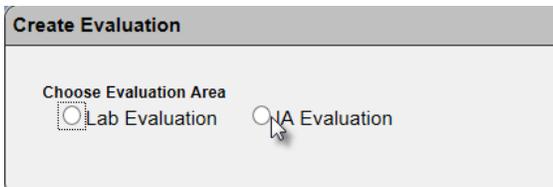


1. Click on the Evaluations menu option.
2. Click on the Evaluations option on the submenu.



3. Click on the Create Evaluation page level action.

A Create Evaluation dialog box will appear. The same dialog box is used for laboratory evaluations under the Laboratory Qualification Program and technician evaluations under the Independent Assurance Program, so you must select the evaluation area to indicate if it is for a laboratory or a technician.



4. Select the IA Evaluation option.

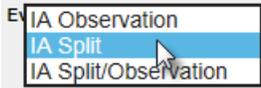
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. Click on the drop down to select the appropriate qualification area, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. **See XXXX – Managing Strikes**

The Evaluation Type selection field will appear.



6. Select IA Split from the drop down list.

7. Enter the District of the Evaluator.

8. Enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

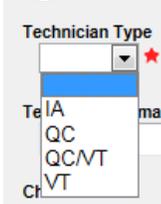
MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR:** Evaluator is not Qualified for this Qualification Area

9. Enter the Laboratory Id where the Evaluator will perform the split sample testing.

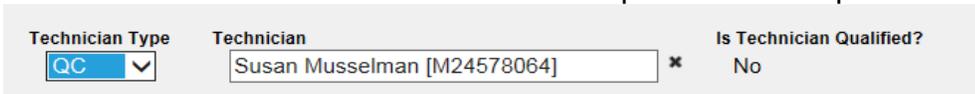
10. Select the Technician Type. This selection assists with the required recipients when the report is generated.



- Select IA if a State Materials Office (SMO) IA evaluator is evaluating another IA evaluator.
- Select QC when the technician being evaluated only performs QC sampling and/or testing.
- Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- Select VT when the technician being evaluated only performs Verification sampling and/or testing.

11. Enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

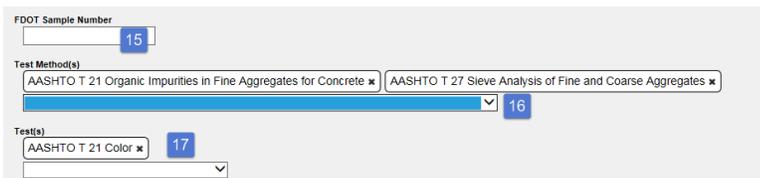


**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

- Enter the Laboratory Id where the evaluated technician will be testing the split sample.
- Enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.
- Enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. MAC will not send an email notification for undelivered emails.



- If there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.
- Select the test methods that will be evaluated by the split sample.
- Select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

**Comment**

This is a comment on an evaluation that will not appear on the QPR.

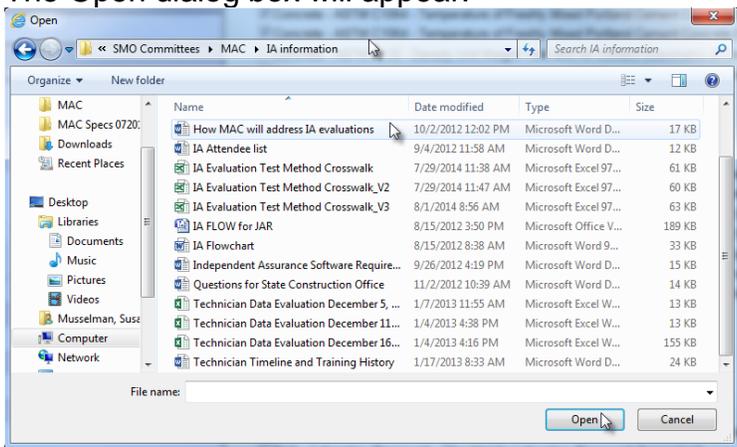
18. If desired, you can enter comments in the comments field. These will not appear on the QPR.

**Supporting Document**      **Description**

Select File      0 %      You may enter descriptive information about the attached document.

19. You may also attach a document to the evaluation.
- Type in a description of the document, if desired.
  - Click on the Select File option under Supporting Document. The Open dialog box will appear.
  - Type in a description of the document, if desired.
  - Click on the Select File option under Supporting Document.

The Open dialog box will appear.



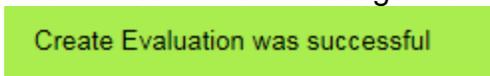
- Navigate to the location where the document is stored.
- Click on the document to select it.
- Click on the Open option to upload the document to the evaluation. The document will appear as attached to the evaluation.
- If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.

+ Add Another Document

Save

19. Click on the Save option to create the evaluation.

You will receive an message that the evaluation was successfully created.



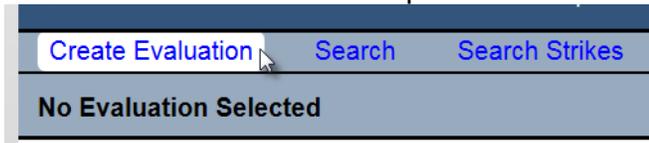
## Chapter 5 – Creating a Split Sample Evaluation on a Field Qualification

The create evaluation dialog screens are slightly different on a laboratory qualification area (like Concrete Lab Level I) and a field qualification area (like Concrete Field Level I)

To create a split sample evaluation on a laboratory qualification:

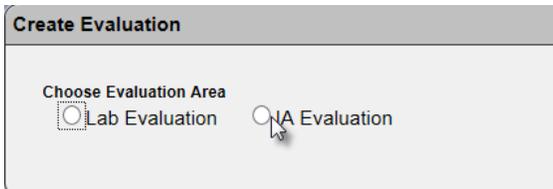


1. Click on the Evaluations menu option.
2. Click on the Evaluations option on the submenu.



3. Click on the Create Evaluation page level action.

A Create Evaluation dialog box will appear. The same dialog box is used for laboratory evaluations under the Laboratory Qualification Program and technician evaluations under the Independent Assurance Program, so you must select the evaluation area to indicate if it is for a laboratory or a technician.



4. Select the IA Evaluation option.

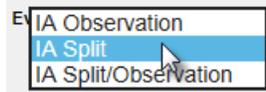
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. Click on the drop down to select the appropriate qualification area, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. **See XXXX – Managing Strikes**

The Evaluation Type selection field will appear.



**Evaluator**

6. Select IA Split from the drop down list.

7. Enter the District of the Evaluator.

8. Enter the company name of the company that employs the evaluated technician.

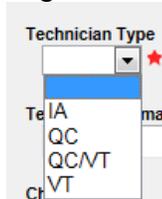
9. Enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR:** Evaluator is not Qualified for this Qualification Area

10. Select the Technician Type. This selection assists with the required recipients when the report is generated.



- a. Select IA if a State Materials Office (SMO) IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.

- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
  - d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.
11. Enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

Technician Type QC	Technician Susan Musselman [M24578064]	Is Technician Qualified? No
-----------------------	---	--------------------------------

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

- 12. Enter the technician’s email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.
- 13. Enter the technician’s supervisor’s email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. MAC will not send an email notification for undelivered emails.

14. If there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.

FDOT Sample Number  
15

Test Method(s)  
 ASTM C1064 Temperature of Freshly Mixed Portland Cement Concrete x ASTM C138 Density x ASTM C143 Slump of Hydraulic x  
 ASTM C173 Air Content of Freshly Mixed Concrete by the Volumetric Method x ASTM C231 Air Content of Freshly Mixed Concrete by the Pressure Method x  
 FM 5-501 Water Cementitious Ratio x 16

Test(s)  
 ASTM C1064 Temperature of Freshly Mixed Portland Cement Concrete x ASTM C138 Density x ASTM C143 Slump of Hydraulic Cement Concrete x  
 ASTM C173 Air Content of Freshly Mixed Concrete by the Volumetric Method x FM 5-501 - Early Sampling for W/C Ratio x 17  
 ASTM C231 Air Content of Freshly Mixed Concrete by the Pressure Method x

- 15. Select the test methods that will be evaluated by the split sample.
- 16. Select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

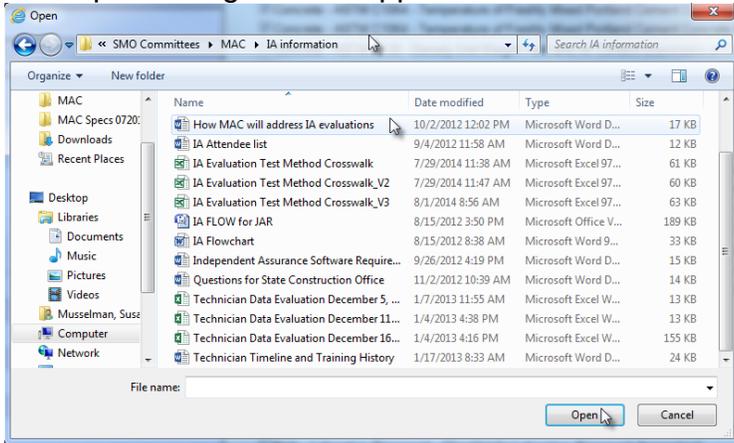
Comment  
 This is a comment on an evaluation that will not appear on the QPR.

17. If desired, you can enter comments in the comments field. These will not appear on the QPR.



18. You may also attach a document to the evaluation.
- a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document. The Open dialog box will appear.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.

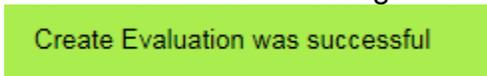


- c. Navigate to the location where the document is stored.
- d. Click on the document to select it.
- e. Click on the Open option to upload the document to the evaluation. The document will appear as attached to the evaluation.
- f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



19. Click on the Save option to create the evaluation.

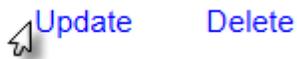
You will receive an message that the evaluation was successfully created.



## Chapter 6 – Performing a Split Sample Evaluation and Entering an Evaluator’s Sample

### A. Updating the Evaluation

Once an evaluation is created, you can update the evaluation record, if needed.



1. Select the Update option.

An Update dialog box will appear.

A screenshot of an 'Update' dialog box. It contains the following fields: 'Evaluation District' with a dropdown menu showing 'SIMC'; 'FDOT Sample Number' with an empty text input field; 'Test Method(s)' with a dropdown menu showing 'ASTM C1064 Temperature of Freshly Mixed Portland Cement Concrete'; and 'Tests' with a dropdown menu showing 'ASTM C1064 Temperature of Freshly Mixed Portland Cement Concrete'. A 'Save' button is located at the bottom right of the dialog box.

2. Update the fields as appropriate.
3. Select the Save option to save the updates.

You will receive a message that the evaluation was successfully updated.

Update Evaluation was successful

### B. Updating Evaluation Emails

To update the email information on an evaluation:



1. Select the Update Emails icon (✎).

An Update Emails dialog box will appear.

A screenshot of an 'Update Technician Emails' dialog box. It contains two text input fields: 'Email' with the value 'employee@dot.mail' and 'Supervisor's Email' with the value 'boss@dot.mail'. A 'Save' button is located at the bottom center of the dialog box.

2. Update either or both emails.
3. Select Save to save the updated emails.

You will receive a message the the emails were successfully updated.

Update Technician Emails was successful

### C. Updating Sample Completed By Date

To update the Sample Completed By Date:

Update  Update Sample Completed By Date Dele

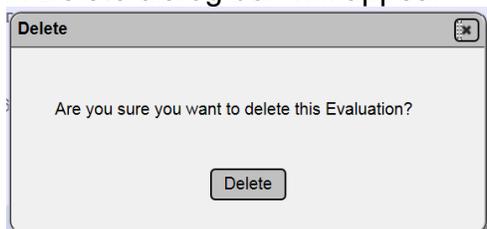
1. Click on the Update Sample Completed by Date option. The Update Sample Completed by dialog box will appear.
2. Set the deadline date the data entry person for the technician must enter the sample and test results. The date defaults to ten business days from the date the evaluation is created. The Sample Completed by Date can be revised until the QPR is generated. Once the QPR is generated, it will automatically fail and result in a strike. The Sample Completed by Date can be updated though to give the technician some more time to complete test results.

### D. Deleting an Observation Evaluation

Update  Delete

1. Select the Delete option.

A Delete dialog box will appear.



2. Select the Delete option to delete the evaluation record.

You will receive a message that the evaluation was successfully deleted.

Delete Evaluation was successful

**NOTE:** You cannot delete an evaluation record if you have generated a QPR.

### E. Entering the Evaluator's Sample and Test Data

The evaluator can navigate directly to the Evaluator Sample from the split evaluation. For instructions on the technician sample, see [Error! Reference source not found.](#)

To navigate to the Evaluator's sample:

Concrete Field Technician Level I VT R16310763 Yes craig@dot.com mikeb@do

FDOT Sample Number	Technician Sample	Evaluator Sample	Samples Complete
	1600014440 [Submitted for Lab Testing]	1600014441 [Submitted for Lab Testing]	8/22/2016

1. Click on the sample hotlink under the Evaluator Sample label. You will be navigated to the sample screen for the evaluator's sample.

Sample 1600014441 [Submitted for Lab Testing] Go To Sample

View Sample Transmittal Information for Print View History

Sample ID	Sample Status
1600014441	Submitted for Lab Testing

Sample Initiated By	Sample Initiated Date	Last Updated By	Last Updated On
Ronnie Hagan	8/8/2016	Ronnie Hagan	8/8/2016

Evaluation	Current Status
000001640 - R16310763	In Progress

FDOT Sample Number	Technician	Email	Supervisor's Email
R16310763		craig@dot.com	mikeb@dot.com

Update Emails

Sample Comments [0] Click to Expand

Documents [0] Click to Expand

The emails on the sample may be updated at this time. See **B. Updating Evaluation Emails.**

2. If the sample is a lab sample, you must acknowledge receipt of the sample to proceed.

- a. Click on the Laboratory Information tab to expand it.

Status	Type	Date Sample Received	Comment
Waiting on Receipt	Full		<a href="#">Acknowledge Sample Receipt</a>

- b. Click on the Acknowledge Sample Receipt option. An Acknowledge Sample Receipt dialog box will appear.

Acknowledge Sample Receipt

Date Received  \*

Comment

Save

1. Enter the date received.
2. Enter any comments, if desired.
3. Click on the Save option to acknowledge the sample was received.

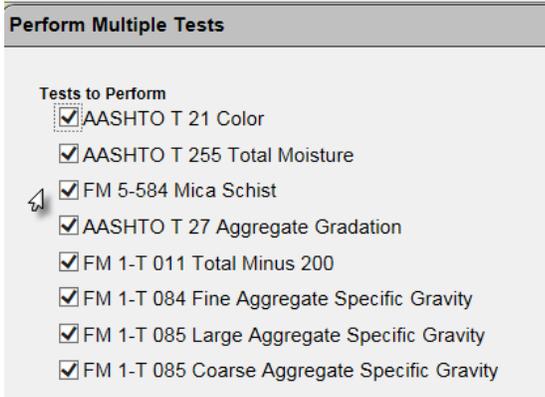
The sample status will be updated to Submitted for Lab Testing.

Click to Collapse

 [Perform Multiple Tests](#)

3. To perform data entry for all or some of the tests, select the Perform Multiple Tests option.

A dialog box will appear with all the available tests.

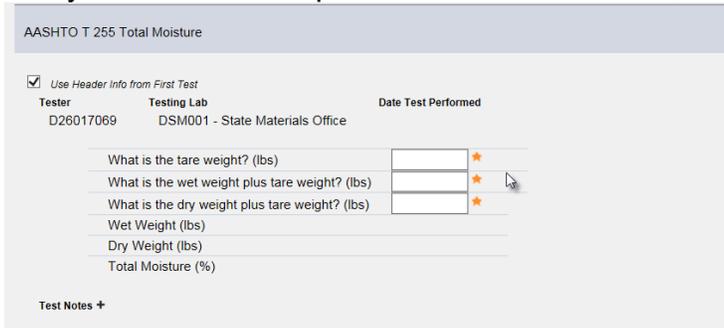


**Perform Multiple Tests**

Tests to Perform

- AASHTO T 21 Color
- AASHTO T 255 Total Moisture
-   FM 5-584 Mica Schist
- AASHTO T 27 Aggregate Gradation
- FM 1-T 011 Total Minus 200
- FM 1-T 084 Fine Aggregate Specific Gravity
- FM 1-T 085 Large Aggregate Specific Gravity
- FM 1-T 085 Coarse Aggregate Specific Gravity

a. If you don't want to perform a test at this time, deselect it from the checked list.



AASHTO T 255 Total Moisture

Use Header Info from First Test

Tester	Testing Lab	Date Test Performed
D26017069	DSM001 - State Materials Office	

What is the tare weight? (lbs)  

What is the wet weight plus tare weight? (lbs)  

What is the dry weight plus tare weight? (lbs)  

Wet Weight (lbs)

Dry Weight (lbs)

Total Moisture (%)

Test Notes 

b. To perform the selected tests, enter the data in the test definition fields as appropriate.



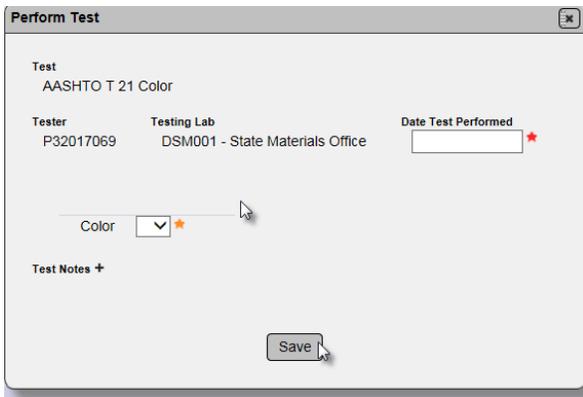


c. When all the entries are complete, select the Save option.



Required  [Perform Test](#) [Mark Test Not Performed](#)

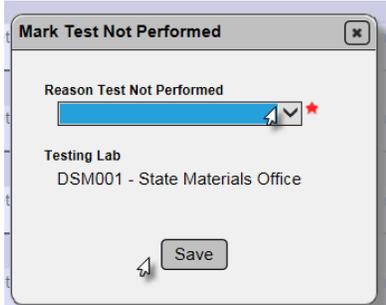
4. To enter one test, select the Perform test option.



- a. Enter the appropriate test data.
- b. Select the Save option to save the test data.

Testing in Progress    Required    Perform Test    **Mark Test Not Performed**

5. Select the Mark Not Test Performed option to indicate that a test was not performed. A Test Not Performed dialog box will appear.



- a. Select the reason the test was not performed from the drop down list.
- b. Select the Save option.

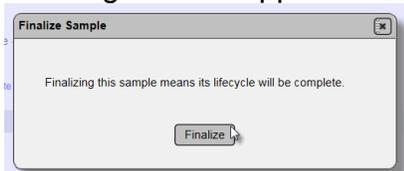
The test status will be updated to Test Not Performed with the reason selected.

6. When all the tests are completed or designated as not performed, the IA evaluator data entry person can finalize the sample.

**Finalize Sample**    View Sample

- a. Review the data to ensure it is correct and complete. If not, make changes as needed.
- b. Select the Finalize Sample option to finalize the IA evaluator's sample.

A dialog box will appear notifying you that finalizing the sample will end the sample life cycle.



- c. Select the Finalize option to continue.

You will receive a message that the sample was finalized successfully.

Finalize Sample was successful

## Chapter 7 – Creating an Observation/Split Sample Evaluation on a Laboratory Qualification

The create evaluation dialog screens are slightly different on a laboratory qualification area (like Concrete Lab Level I) and a field qualification area (like Concrete Field Level I)

To create an observation/split evaluation on a laboratory qualification:

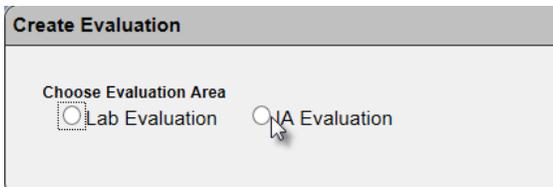


1. Click on the Evaluations menu option.
2. Click on the Evaluations option on the submenu.



3. Click on the Create Evaluation page level action.

A Create Evaluation dialog box will appear. The same dialog box is used for laboratory evaluations under the Laboratory Qualification Program and technician evaluations under the Independent Assurance Program, so you must select the evaluation area to indicate if it is for a laboratory or a technician.



4. Select the IA Evaluation option.

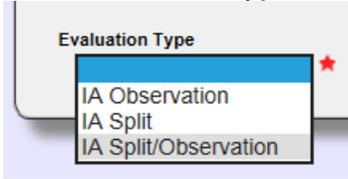
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. Click on the drop down to select the appropriate qualification area, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. **See XXXX – Managing Strikes**

The Evaluation Type selection field will appear.



6. Select the IA Split/Observation option from the drop down list.

A screenshot of a web form for evaluation. The form includes several fields and sections:

- Choose Evaluation Area:** Radio buttons for "Lab Evaluation" and "IA Evaluation" (selected).
- Qualification Area:** A dropdown menu showing "Aggregate Testing Technician".
- Evaluation Type:** A dropdown menu showing "IA Split/Observation".
- Evaluation District:** A dropdown menu showing "7".
- Lab Being Evaluated:** A text input field with placeholder "Start typing Lab name or Lab ID to get a list".
- Evaluator:** A text input field with placeholder "Type Technician Name or TIN".
- Evaluator Lab:** A text input field with placeholder "Start typing Lab Name or Lab ID to get a list".
- Technician Type:** A dropdown menu showing "11".
- Technician:** A text input field with placeholder "Type Technician Name or TIN".
- Technician's Email:** A text input field.
- Supervisor's Email:** A text input field.
- Checklists:** A section header.

Numbered callouts (7-14) are placed over various fields to indicate where to enter information.

7. Enter the District of the Evaluator.

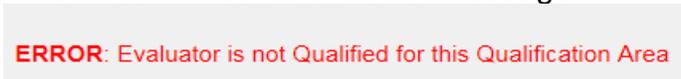
8. Enter the Laboratory Id where the technician will perform the testing and the evaluation is located. If there is a failing test step on an equipment checklist, it will generate an LQPR for this laboratory.

9. Enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

A screenshot of the "Evaluator" field. The text "Susan Musselman [M24578064]" is entered in the input field. To the right of the field is a red "x" icon. Further right is the label "Is Evaluator Qualified?" with the value "No" displayed below it.

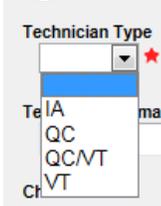
MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:



10. Enter the Laboratory Id where the Evaluator will perform the testing.

11. Select the Technician Type. This selection assists with the required recipients when the report is generated.



- a. Select IA if a State Materials Office (SMO) IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.
- d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

12. Enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

A screenshot of a form section. On the left, there is a dropdown menu labeled 'Technician Type' with 'QC' selected. To its right is a text input field labeled 'Technician' containing the text 'Susan Musselman [M24578064]'. To the right of this field is a small 'x' icon. Further right is a label 'Is Technician Qualified?' with the value 'No' displayed below it.

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

13. Enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

14. Enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. MAC will not send an email notification for undelivered emails.

Checklists

- Select All
- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Equipment]
- Aggregate - AASHTO T 21 - Organic Impurities in Fine Aggregate for Concrete [Procedure]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Equipment]
- Aggregate - AASHTO T 255 - Total Moisture Content of Aggregate by Drying [Procedure]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Equipment]
- Aggregate - AASHTO T 27 - Sieve Analysis of Fine and Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 002 - Sampling Aggregates [Procedure]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75-µm No. 200 Sieve [Equipment]
- Aggregate - FM 1-T 011 - Total Materials Finer than 75-µm No. 200 Sieve [Procedure]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Equipment]
- Aggregate - FM 1-T 084 - Specific Gravity and Absorption of Fine Aggregate [Procedure]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Equipment]
- Aggregate - FM 1-T 085 - Specific Gravity and Absorption of Coarse Aggregate [Procedure]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Equipment]
- Aggregate - FM 1-T 248 - Reducing Aggregate Samples to Testing Size [Procedure]

14. Select the appropriate checklists from the master list. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

FDOT Sample Number

Test Method(s)

Test(s)

15. If there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.

16. Select the test methods that will be evaluated by the split sample.

17. Select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

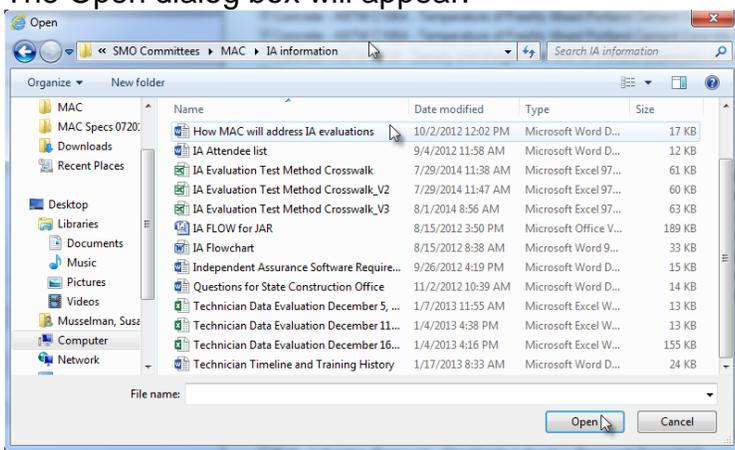
Comment

18. If desired, you can enter comments in the comments field. These will not appear on the QPR.



19. You may also attach a document to the evaluation.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document. The Open dialog box will appear.
    - a. Type in a description of the document, if desired.
    - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.

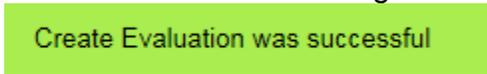


- c. Navigate to the location where the document is stored.
  - d. Click on the document to select it.
  - e. Click on the Open option to upload the document to the evaluation. The document will appear as attached to the evaluation.
  - f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



20. Click on the Save option to create the evaluation.

You will receive an message that the evaluation was successfully created.



## Chapter 8 – Creating an Observation/Split Sample Evaluation on a Field Qualification

The create evaluation dialog screens are slightly different on a laboratory qualification area (like Concrete Lab Level I) and a field qualification area (like Concrete Field Level I)

To create an observation/split evaluation on a field qualification:

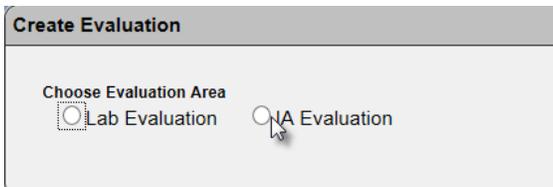


1. Click on the Evaluations menu option.
2. Click on the Evaluations option on the submenu.



3. Click on the Create Evaluation page level action.

A Create Evaluation dialog box will appear. The same dialog box is used for laboratory evaluations under the Laboratory Qualification Program and technician evaluations under the Independent Assurance Program, so you must select the evaluation area to indicate if it is for a laboratory or a technician.



4. Select the IA Evaluation option.

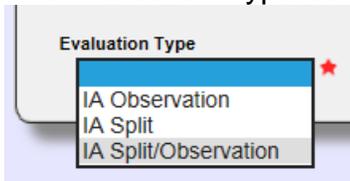
The dialog box will expand to include a Qualification Area field. A ★ indicates a required field.



5. Click on the drop down to select the appropriate qualification area, for example, Aggregate Testing Technician.

**NOTE:** Some technicians are qualified in more than one qualification area. Each evaluation is restricted to a single qualification area. If you want to evaluate a technician in more than one qualification area, you must perform each evaluation separately. This is because MAC assigns strikes to a technician for a specific qualification area if the evaluation is Unsatisfactory. **See XXXX – Managing Strikes**

The Evaluation Type selection field will appear.



6. Select the IA Split/Observation option from the drop down list.

A screenshot of a web form for evaluation. The form includes several fields with numbered callouts: 7 points to the 'Evaluation District' dropdown (value: 7); 8 points to the 'Company' search field (value: Start typing Company name to get a list of); 9 points to the 'Evaluator' search field (value: Type Technician Name or TIN); 10 points to the 'Technician Type' dropdown (value: IA); 11 points to the 'Technician' search field (value: Type Technician Name TIN); 12 points to the 'Technician's Email' field; and 13 points to the 'Supervisor's Email' field. There are also radio buttons for 'Lab Evaluation' and 'IA Evaluation', and a 'Qualification Area' dropdown (value: Concrete Field Technician Level I).

7. Enter the District of the Evaluator.

8. Enter the company name of the company that employs the evaluated technician.

9. Enter the Evaluator's name or TIN. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate evaluator from the list to populate the field.

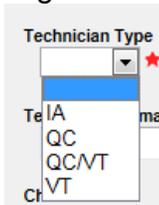
A screenshot of the 'Evaluator' field in the form. The field contains the text 'Susan Musselman [M24578064]' followed by a red 'x' icon. To the right of the field is a label 'Is Evaluator Qualified?' with a dropdown menu showing 'No' selected.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

**NOTE:** The evaluator must be qualified in the qualification area that was selected in step 3. If the evaluator is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR:** Evaluator is not Qualified for this Qualification Area

10. Select the Technician Type. This selection assists with the required recipients when the report is generated.



- a. Select IA if a State Materials Office (SMO) IA evaluator is evaluating another IA evaluator.
- b. Select QC when the technician being evaluated only performs QC sampling and/or testing.
- c. Select QC/VT when the technician being evaluated performs both QC and VT sampling and/or testing.

d. Select VT when the technician being evaluated only performs Verification sampling and/or testing.

11. Enter the name or TIN of the technician being evaluated. This is a search field that retrieves matching CTQP records based on a minimum of 3 characters. The more characters you provide, the shorter the list. Select the appropriate technician from the list to populate the field.

MAC will check to see if the TIN entered is qualified in the qualification area selected.

Technician Type: QC  
Technician: Susan Musselman [M24578064] \*  
Is Technician Qualified?: No

**NOTE:** The technician must be qualified in the qualification area that was selected in step 3. If the technician is not qualified in the qualification area, you will not be able to perform the evaluation in MAC. You will receive an error message:

**ERROR: Technician is not Qualified for this Qualification Area**

12. Enter the technician's email address. This field may be populated by the information in the CTQP database. If the field is populated, verify that the information is correct and current.

13. Enter the technician's supervisor's email address.

**NOTE:** Verify that the email information is correct and complete before saving the evaluation. MAC will not send an email notification for undelivered emails.

Checklists

- Select All
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Equipment]
- Concrete - ASTM C1064 - Temperature of Freshly Mixed Portland Cement Concrete [Procedure]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Equipment]
- Concrete - ASTM C138 - Density Unit Weight Yield and Air Content Gravimetric of Concrete [Procedure]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Equipment]
- Concrete - ASTM C143 - Slump of Hydraulic Cement Concrete [Procedure]
- Concrete - ASTM C172 - Sampling Freshly Mixed Concrete [Equipment]
- Concrete - ASTM C172 - Sampling Freshly Mixed Concrete [Procedure]
- Concrete - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method [Equipment]
- Concrete - ASTM C173 - Air Content of Freshly Mixed Concrete by the Volumetric Method [Procedure]
- Concrete - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method [Equipment]
- Concrete - ASTM C231 - Air Content of Freshly Mixed Concrete by Pressure Method [Procedure]
- Concrete - ASTM C31 - Making and Curing Concrete Test Specimens in the Field [Equipment]
- Concrete - ASTM C31 - Making and Curing Concrete Test Specimens in the Field [Procedure]
- Concrete - FM 5-501 - Water Cementitious Ratio [Procedure]

14. Select the appropriate checklists from the master list. Clicking on the Select All option selects all the checklists. This may be helpful if most of the checklists will be used. You may Select All and then deselect the ones not being used. Checklists may also be selected individually as appropriate.

FDOT Sample Number: 15

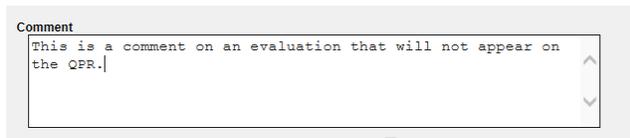
Test Method(s): AASHTO T 21 Organic Impurities in Fine Aggregates for Concrete, AASHTO T 27 Sieve Analysis of Fine and Coarse Aggregates

Test(s): AASHTO T 21 Color

15. If there is an FDOT Sample Number, enter it here. It is not required, but providing a unique FDOT Sample Number assists the technician with searching for the sample.

16. Select the test methods that will be evaluated by the split sample.

17. Select the appropriate test definitions. This will assign the actual tests for data entry on the sample.

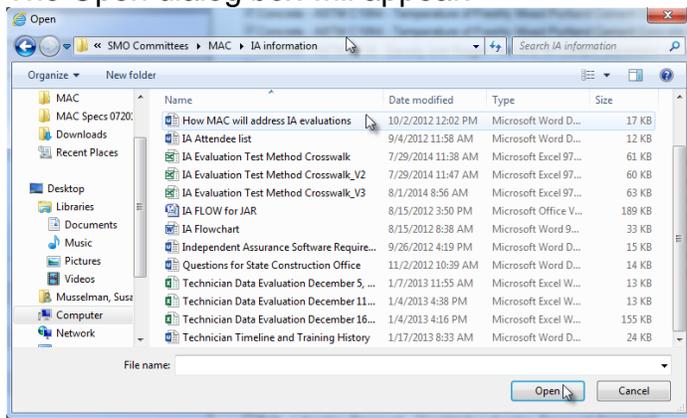


18. If desired, you can enter comments in the comments field. These will not appear on the QPR.



19. You may also attach a document to the evaluation.
- a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document. The Open dialog box will appear.
  - a. Type in a description of the document, if desired.
  - b. Click on the Select File option under Supporting Document.

The Open dialog box will appear.

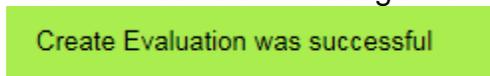


- c. Navigate to the location where the document is stored.
- d. Click on the document to select it.
- e. Click on the Open option to upload the document to the evaluation. The document will appear as attached to the evaluation.
- f. If you wish to add another document, Click on the + by the Add Another Document option and repeat the steps.



20. Click on the Save option to create the evaluation.

You will receive an message that the evaluation was successfully created.



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## Chapter 9 – Performing an Observation/Split Sample Evaluation

Performing the Observation/Split sample evaluation is a combination of the functions for the observation evaluation and the split sample evaluation. Follow the Observation instructions in **Chapter 3 – Performing an Observation Evaluation on a Field or Laboratory Technician**. Follow the Split Sample Instructions in **Chapter 6 – Performing a Split Sample Evaluation and Entering an Evaluator’s Sample**.

## Chapter 10 – Generating the Qualification Performance Report for Observation, Split and Observation/Split Evaluations

For Observation and Observation/Split, when all the checklists are submitted and have a status of either Pass or Fail, you will see an option to generate the Qualification Performance Report (QPR). For split, when both samples are finalized or the Sample Completed By Date has passed, you will see an option to generate the QPR.

If the evaluation is for a laboratory qualification and it includes equipment failures, you will be generating a QPR and an LQPR at the same time.

### A. Generating the QPR

1. Click on the Generate Report(s) option.

Update   Generate Report(s)   Delete

The Generate Report(s) dialog box will appear.

Lab Being Evaluated: LAB-DSM001 - State Materials Office    Technician: Technician's TN

**QPR distribution list**

Recipients:

<input checked="" type="checkbox"/> Technician	Technician's Name	<a href="mailto:techemail@email.com">techemail@email.com</a>
<input checked="" type="checkbox"/> Technician's Supervisor	Boss Name	<a href="mailto:bossemail@email.com">bossemail@email.com</a>
<input type="checkbox"/> QC Manager	QC Manager Name	<a href="mailto:qcmanemail@email.com">qcmanemail@email.com</a>
<input type="checkbox"/> Resident Engineer	RE Name	<a href="mailto:resenemail@email.com">resenemail@email.com</a>
<input type="checkbox"/> District Materials and Research Engineer (DMRE)	DMRE Name	<a href="mailto:dmreemail@email.com">dmreemail@email.com</a>
<input type="checkbox"/> District Construction Engineer (DCE)	DCE Name	<a href="mailto:dceemail@email.com">dceemail@email.com</a>
<input checked="" type="checkbox"/> Other	Other Name	<a href="mailto:otheremail@email.com">otheremail@email.com</a>

+ Add Recipient

Comment: This is the comments section. The comments entered here will appear on the QPR.

Attachment: Select File    0 %    Description

**LQPR distribution list**

Recipients:

<input checked="" type="checkbox"/> Lab Manager	Lab Manager's Name	<a href="mailto:labmgtemail@email.com">labmgtemail@email.com</a>
<input checked="" type="checkbox"/> Contact Person	Contact Person's Name	<a href="mailto:contactemail@email.com">contactemail@email.com</a>
<input type="checkbox"/> Other		

+ Add Recipient

Comment: This comment will appear on the LQPR. It will not appear on the QPR for the technician.

Attachment: Select File    0 %    Description

Generate

Resident Engineer

2. Complete the QPR distribution list. The distribution list is generated by the Technician Type selection on the evaluation. It may be overridden by deselecting the checkbox next to the title.

Other    
+ Add Recipient

3. If there are additional recipients, the Other field may be used to add the name and email of the recipient.

4. If more than one Other recipient is needed, click on the + next to the Add Recipient option to provide additional fields for names and emails.

Comment  
This is the comments section. The comments entered here will appear on the QPR.

5. Enter comments that you want to include in the QPR in this comments section.

Attachment  0 %

6. If you would like to include an attachment to the QPR, use the Select File option to navigate to the document and the Description field, desired.

LQPR distribution list

<input checked="" type="checkbox"/> Lab Manager	Butch Hines	<a href="mailto:butch.hines@dot.state.fl.us">butch.hines@dot.state.fl.us</a>
<input checked="" type="checkbox"/> Contact Person	Butch Hines	<a href="mailto:butch.hines@dot.state.fl.us">butch.hines@dot.state.fl.us</a>
<input type="checkbox"/> Other		

+ Add Recipient

7. If the qualification area includes a Lab Id, an LQPR will also be generated. Complete the LQPR recipients.

Comment 87 of 2000  
This comment will appear on the LQPR. It will not appear on the QPR for the technician.

8. Enter comments that you want to include in the LQPR in this comments section.

Attachment Description

Select File 0 % [Text Area]

9. If you would like to include an attachment to the LQPR, use the Select File option to navigate to the document and the Description field, desired.

Generate

10. To generate the QPR and LQPR (if applicable) and send to designated recipients, click on the Generate option.

You will receive a message that the QPR was successfully generated.

Generate Report(s) was successful

### B. Viewing a QPR

Once the QPR has been generated and sent to the email addresses on the distribution list, you may view it.

Evaluation Status	Date	QPR Status	QPR	LQPR Status	LQPR	Previously Generated Reports	Attachments
In Progress	11/17/2014						
Report Generated	11/17/2014	Satisfactory	11/17/2014	Not Required			
In Progress	11/17/2014						

1.

Select a specific QPR by clicking on the date the QPR was issued.

A dialog box will appear to generate or save the report.

2. Select the Open option to view the report as a pdf.

Do you want to open or save QPR.pdf (29.1 KB) from fdotews1.dot.state.fl.us? Open Save Cancel

The Report will appear.



STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION  
QUALIFICATION PERFORMANCE REPORT

MAC Evaluation ID:	000000061	Evaluation Type:	IA Observation
Tech Name:	Technician's name		
Active in District:			
Date(s) of Evaluation:	11/25/2014	Qualification Area Reviewed:	Concrete Laboratory Technician Level I and Level II
Evaluation Status:	Unsatisfactory		
Checklist: ASTM C1231			FAILED
Failed Step : 6	The inside diameter of the retaining ring shall not be less than 102 % or greater than 107 % of the diameter of the cylinder.		
Checklist: ASTM C31			PASS
Checklist: ASTM C31			PASS
Checklist: ASTM C39			PASS

Comments: This is the comments section. The comments entered here will appear on the QPR.

Evaluation Summary:  
Was Sampling, Testing and/or Reporting demonstrated according to qualification standards? No, evaluation unsatisfactory.  
If results were unsatisfactory, this evaluation resulted to: STRIKE 1  
If strike 1 or 2, results were documented.  
If strike 3, written summary of evaluations were sent to District Material Engineer for disposition.

<u>Craig Roberts</u> Signature of Independent Assurance Evaluator/Observer	<u>November 25, 2014</u> Date Approved
cc: Technician _____ Technician's Supervisor _____ Other _____	Technician's name _____ Boss Name _____ Other Name _____

Checklists with all steps passing will only have the checklist title and the status of PASS. Checklists with any failing steps will appear with a status of FAILED and the actual failing steps will be listed under the checklist title. The comments entered on the QPR Generate Report(s) comment box will also appear on the QPR.

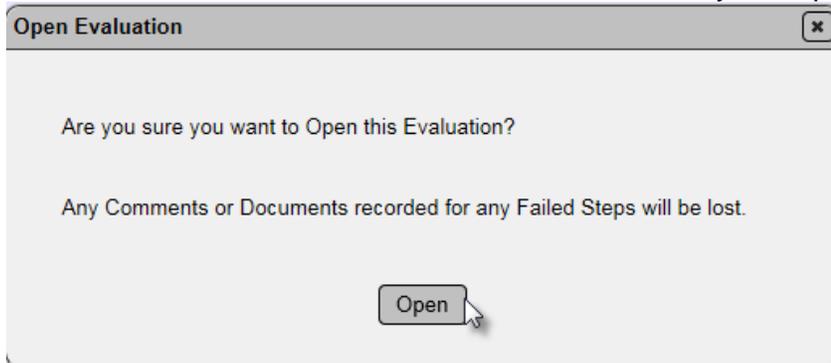
C. Revising an Existing QPR

Once you have generated the QPR, MAC will distribute it to the recipients. If the report needs to be revised for any reason, the QPR must be regenerated and redistributed so that the original recipients have the latest version of the report.



1. Click on the Open Evaluation option.

A warning dialog box will appear. The intent of this message is to inform you that if you made comments or attached any documents in the Generate Report(s) for the original QPR, they will be lost. You must reenter them or reattach them if they still apply.



2. If you are sure you need to revise the QPR, select Open.

The evaluation returns to a status of "In Progress".

3. Make changes to checklists, etc. to revise the evaluation.

4. When you have completed all the revisions, select the Submit option.



5. Select the Generate Report(s) option to generate the revised QPR.

The Generate Report(s) dialog box will appear.

6. Complete the dialog box as described on page [45](#). If there were comments or documents on the original report and they still apply you must reenter them.

The new report will be listed in the Report History tab.

7. Click on the Report History tab to expand it.

8. Select the revised report by clicking on the date.

Report History							
Evaluation Status	Date	QPR Status	QPR	LQPR Status	LQPR	Previously Generated Reports	Attachments
In Progress	11/26/2014						
Report Generated	11/26/2014	Unsatisfactory	<a href="#">11/26/2014</a>	Not Required			<a href="#">DRAFT IA FLOW for JAR-2.pdf</a>
In Progress	11/26/2014						
Report Generated	11/26/2014	Unsatisfactory	<a href="#">11/26/2014</a>	Not Required			

9. Select Open to view the revised report.  
The report header will reflect the QPR is revised.



STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION  
QUALIFICATION PERFORMANCE REPORT

(Revised)

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MAC Evaluation ID:	000000101	Evaluation Type:	IA Observation
Tech Name:			
Active in District:			
Date(s) of Evaluation:	11/26/2014	Qualification Area Reviewed:	Concrete Field Technician Level I
Evaluation Status:	Unsatisfactory		

Checklist: ASTM C1064	PASS
Checklist: ASTM C1064	FAILED

## Chapter 11 – Creating a Proficiency Sample Evaluation by the State Materials Office

The State Materials Office is responsible for initiating the proficiency sample evaluation packages. MAC is designed so that all the samples in an evaluation are packaged together. This is so that the like samples can be analyzed for which technicians are within the statistical limits (satisfactory QPR) and which ones are outside (unsatisfactory QPR).

### A. Creating the Proficiency Sample Package

To create a proficiency sample evaluation:

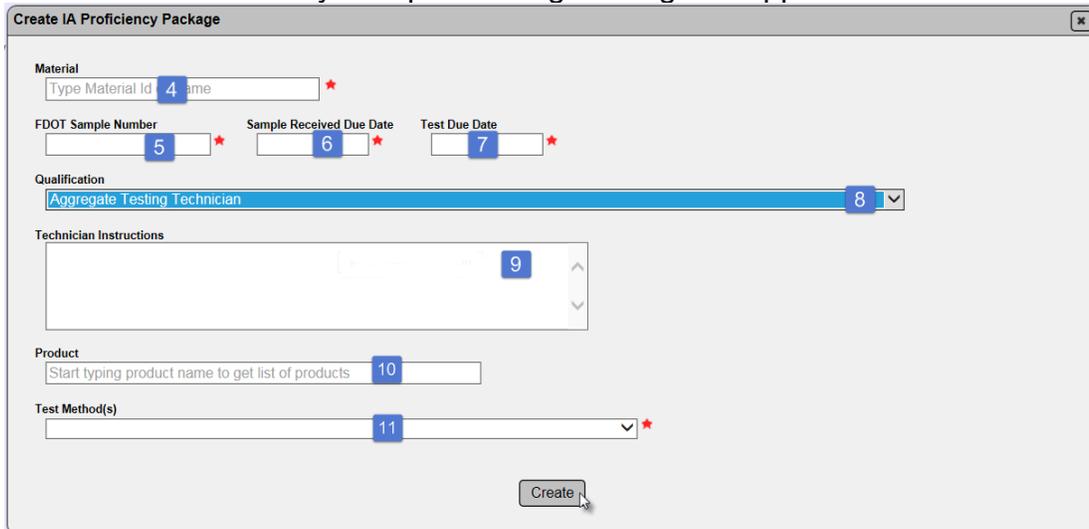


1. Select the Evaluations menu option.
2. Select the IA Proficiency option.



3. Select the Create IA Proficiency Package option.

A Create IA Proficiency Sample Package dialog box appears.

A screenshot of a dialog box titled 'Create IA Proficiency Package'. It contains several input fields and a dropdown menu. Blue callout boxes with numbers 4 through 11 point to specific fields: 4 points to the 'Material' field, 5 to 'FDOT Sample Number', 6 to 'Sample Received Due Date', 7 to 'Test Due Date', 8 to the 'Qualification' dropdown, 9 to the 'Technician Instructions' text area, 10 to the 'Product' field, and 11 to the 'Test Method(s)' dropdown. A 'Create' button is at the bottom right.

4. Enter the Material for the proficiency, for example; 901 for aggregate, 334 for asphalt, etc.
5. Enter the FDOT Sample Number.
6. Enter the Sample Received Due Date.
7. Enter the Test Due Date. This date cannot be before the sample received due date.
8. Select the Qualification area. This will cause the Test Methods field to appear.
9. Provide any technician instructions. These instructions will display on all sample logins.

10. Some materials, like aggregate, require a product code to complete the tests. Enter a product code if it is a material that needs one.
11. Select the test methods that will be evaluated. These test methods are the ones that are associated to the qualification that was selected above.

Once a test method has been selected, you will be able to select the specific test definitions and test questions.

- a. Select the appropriate test definition in the test field. The Question(s) field will appear.
  - b. Select the test question(s) from the test definition that MAC will apply the proficiency sample analysis.
  - c. If another test needs to be added, select the Add Another Test option. Continue until all test definitions and test questions are selected.
12. Select the Create option to create the proficiency sample evaluation.

## B. Updating a Proficiency Sample Package

To update an already created proficiency sample package:



1. Select the Update option.

An Update dialog box will appear.

2. Make changes as needed.
3. Select the Save option to save the changes.

You will receive a message that the proficiency sample package was successfully updated.

Update IA Proficiency Package was successful

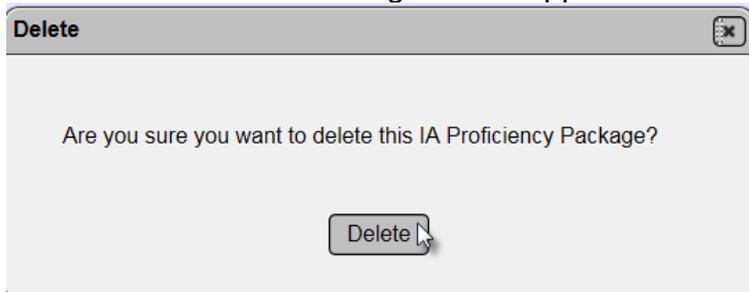
### C. Deleting a Proficiency Sample Package

To delete a proficiency sample package:

Update Delete

1. Select the Update option.

A Delete confirmation dialog box will appear.



2. Select the Delete option to delete the package.

**NOTE:** Once testing has begun (the SMO selects the Begin Testing option), a package cannot be deleted.

### D. Updating Tests and Questions

To update the tests and questions:

Tests [1]

1. Click on the Tests tab to expand it.

Update Tests/Questions

2. Click on the Update Tests/Questions option.

An Update Tests/Questions dialog box will appear.

Update Tests/Questions

Test Method(s)

ASTM C1231 Use of Unbonded Caps in Determination of Compressive Strength of Hardened Concrete Cylinders ✕

ASTM C39 Compressive Strength of Cylindrical Concrete Specimens ✕

ASTM C617 Capping Cylindrical Concrete Specimens ✕

Test

ASTM C39 Compressive Strength

Question(s)

Average Compressive Strength: Average Compressive Strength ✕

+ Add Another Test

Save

3. To remove existing tests, click on the X next to the test.
4. To add tests, click on the drop down list.
5. To add test questions:
  - a. Click on the test from the drop down.
  - b. Select the test question from the Question(s) drop down.
6. To delete existing questions, click on the X next to the question.
7. Select Save when all changes have been made.

You will receive a message that the update was successful.

Update IA Proficiency Package Tests was successful

#### E. Uploading Documents to the Proficiency Sample Package

To upload a document to the package:

Documents [0]

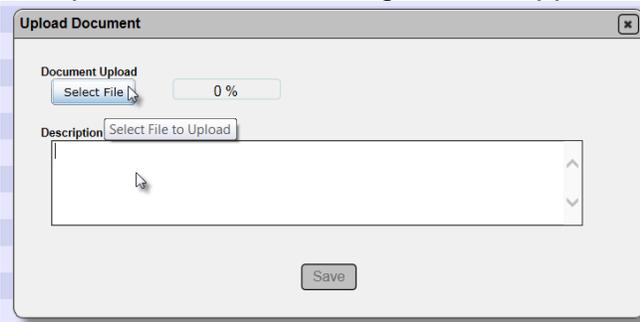
1. Click on the Documents tab to expand it.

Click to Collapse

Upload Document

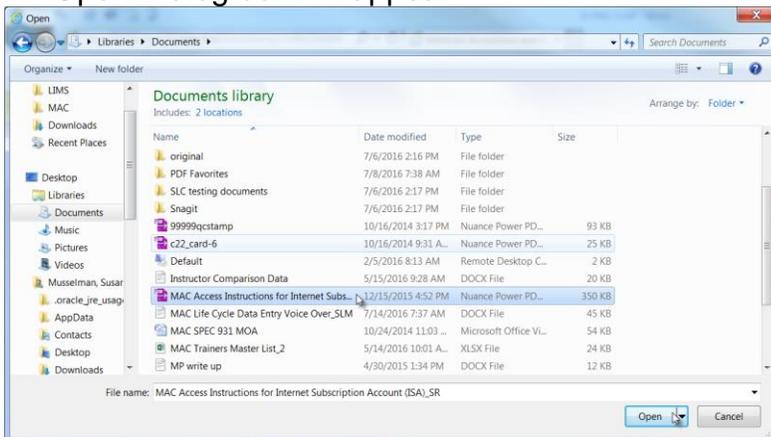
2. Select the Upload Document option.

An Upload Document dialog box will appear.



3. Click on the Select File option to navigate to the file location.

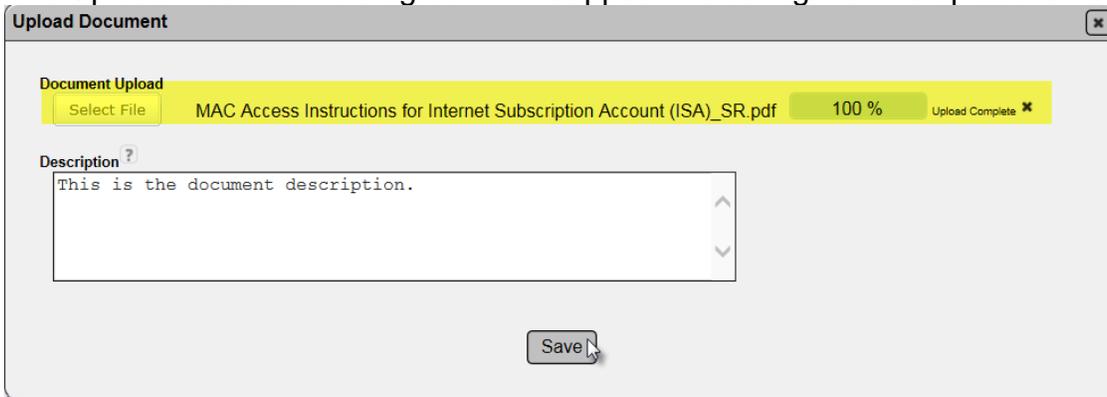
An Open Dialog box will appear.



4. Click on the file to select it.

5. Click on the Open option.

The Upload Document dialog box will reappear indicating that the upload is 100% complete.



6. Enter any description, if desired.

7. Click on the Save option to save the uploaded document in the system.

You will receive a message that the document was successfully uploaded.

Add Document to IA Proficiency was successful

## F. Viewing Uploaded Documents, Updating the Document Description and Deleting Uploaded Documents

To view an uploaded document:



1. Select the View Document option next to the document you want to view.



2. Select Save to continue the download and view the document.



3. Select Open to open the download.

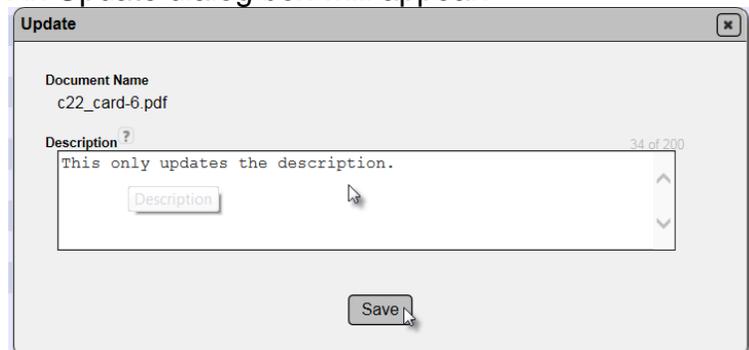
The document will be opened in the file format in which is was saved; for example, pdf.

To Update the document description:



1. Select the Update option next to the document you want to update.

An Update dialog box will appear.



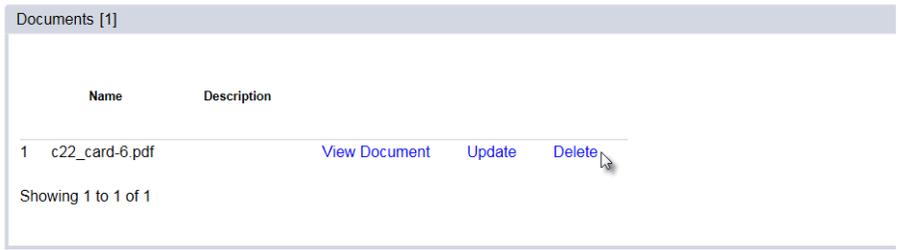
2. Update the description.

3. Select the Save option to save the new description.

You will receive an error message that the description was successfully updated.

Update IA Proficiency Document was successful

To delete a document:

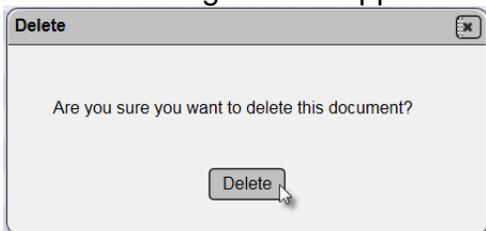


	Name	Description	
1	c22_card-6.pdf		<a href="#">View Document</a> <a href="#">Update</a> <a href="#">Delete</a>

Showing 1 to 1 of 1

1. Select the Delete option next to the document you want to delete.

A Delete dialog box will appear.



2. Select the Delete option to delete the document.

You will receive an error message that the document was successfully deleted.

Remove Document from IA Proficiency was successful

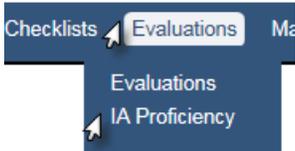


## Chapter 12 – Setting up Labs and Technicians (DMROs and SMO)

Once the State Material Office has initiated the proficiency sample package, the next step is for the District Materials and Research Office and State Materials Office (if needed) to add laboratories and technicians.

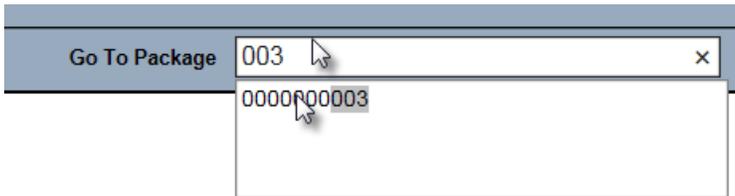
**NOTE:** The proficiency sample process is for laboratory qualifications only at this time. These instructions are based on the selection of a laboratory qualification.

### A. Opening an Existing Proficiency Sample Package



1. From the menu, select the Evaluations option.
2. Select IA Proficiency from the submenu.

You will be navigated to the IA Proficiency screen. The first time you navigate to this screen, it will be blank. Once you have created or updated an IA proficiency package, it will default to the last IA proficiency package you created or updated.



3. If you know the Evaluation Id of the IA proficiency package, enter it in the GoTo Package field.
4. Select the appropriate package id from the list.

You will be navigated to the IA proficiency package.



4. If you don't know the Evaluation Id, select the Search option to search for an IA proficiency package.

A search screen will appear at the top of the page.

The screenshot shows a search filter interface with the following fields and options:

- Material:** Type Material Id or Name (text input)
- FDOT Sample Number:** (text input)
- Qualification:** Concrete Laboratory Technician Level I (dropdown menu)
- Status:** In Progress (dropdown menu)
- Test:** Start typing Test name or description to go (text input)
- Technician:** Type Technician Name or TIN (text input)

Buttons: Search, Clear Search. A message at the bottom states: "Currently selected criteria will yield 1 result".

5. Enter the search criteria to narrow down the list. MAC will indicate the number of results that meet the provided search criteria.

6. Select Search to perform the search.

A list of the search results will appear below the Search option.

The screenshot shows a table of search results with a search button in the top right corner. The table has the following columns: Package Number, FDOT Sample Number, Qualification, and Status.

	Package Number	FDOT Sample Number	Qualification	Status
1	0000000002	5F001I	Asphalt Plant Level I	In Progress
2	0000000003	2D001P	Asphalt Plant Level I	In Progress
3	0000000005	SM-CONC1	Concrete Laboratory Technician Level I	In Progress

7. Click on the IA proficiency package to navigate to that package.

## B. Adding a Contact Person

The screenshot shows a form for "District 1" with the following sections:

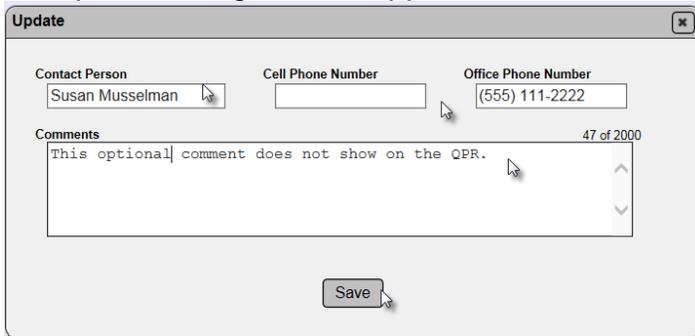
- Contact Person:** Cell Phone Number, Office Phone Number
- Comments:** Technicians [0], Documents [0]

Buttons: Update, Click to Expand (for Technicians and Documents).

1. Click on the District Tab to expand it.

2. Click on the Update option.

An Update dialog box will appear.



3. Enter the name and one phone number (only one is required) of the contact person. This information is required to continue the process of adding technicians. The contact person is District or State Materials Office person responsible for coordinating the distribution of the proficiency samples.
4. Add a comment, if desired.
5. Select the Save option.

### C. Setting up Technicians and Labs

Once the contact person is added, the page level action to set the technicians becomes available.



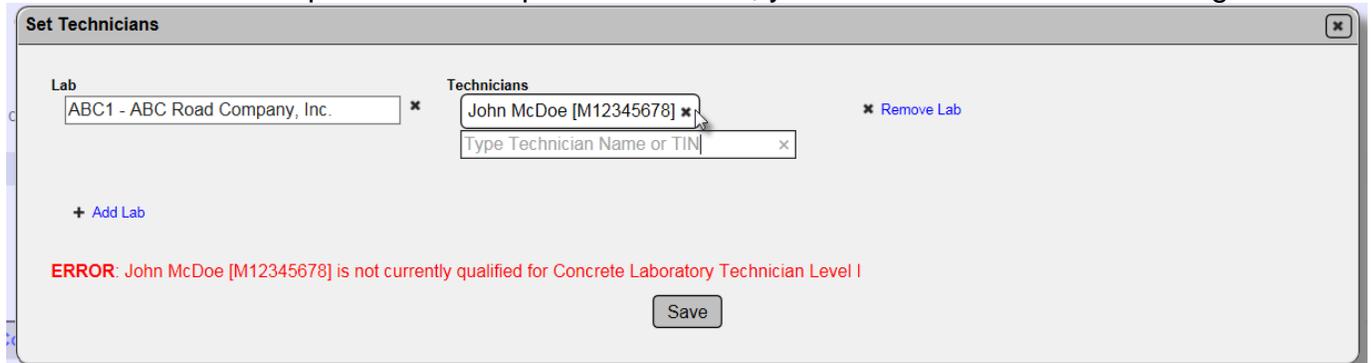
1. Click on the Technicians tab to expand it.
2. Select the Set Technicians option.

A Set Technicians dialog box will appear.



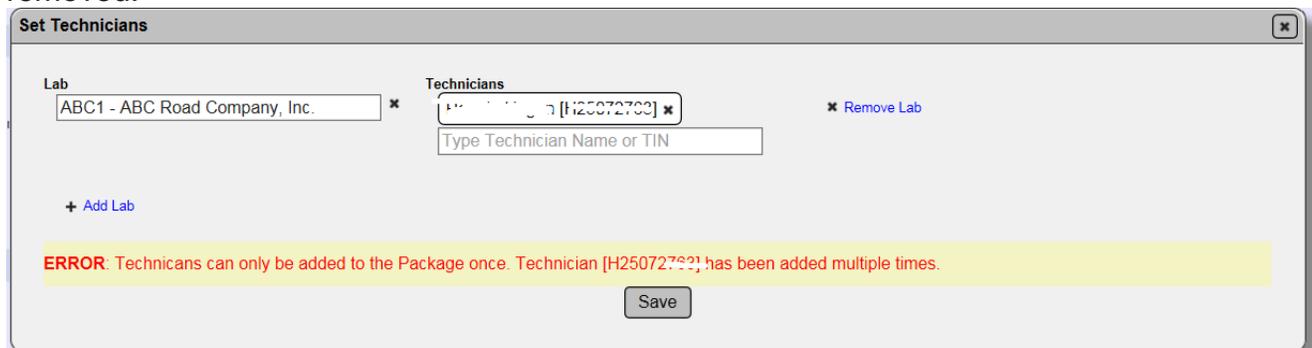
3. Enter the Lab Id of the first technician(s).
4. Enter the technician(s) at that lab.
5. To remove a lab from the entry, select the X next to the Remove Lab option.
6. To add another lab, select the + next to the Add Lab option. A new row will appear to add another lab and additional technician(s). Repeat until all labs and technicians are entered.
7. Select Save to save the entry.

If a technician is not qualified in the qualification area, you will receive an Error message.



8. Click on the X next to the technicians name and TIN to remove the entry.

A technician cannot be included in more than one district. If a district enters a technician already entered on another district, you will receive this error message and the technician will need to be removed.



If there are no unqualified or duplicated technicians, you will receive a message that the package was updated successfully.



#### D. Adding documents to the District tab

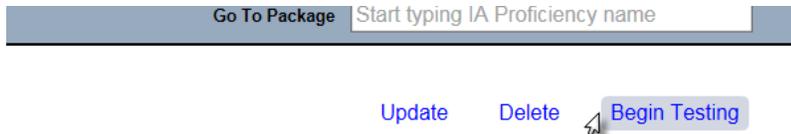
The districts can add district specific documents to their tab. Follow the document instructions found in **E. Uploading Documents to the Proficiency Sample Package.**

Once all the Districts have completed setting up technicians and labs, the State Materials Office can initiate the sample testing phase. Technicians cannot be added to the proficiency sample package once the SMO begins the testing.

## Chapter 13 – Initiating Proficiency Sample Testing

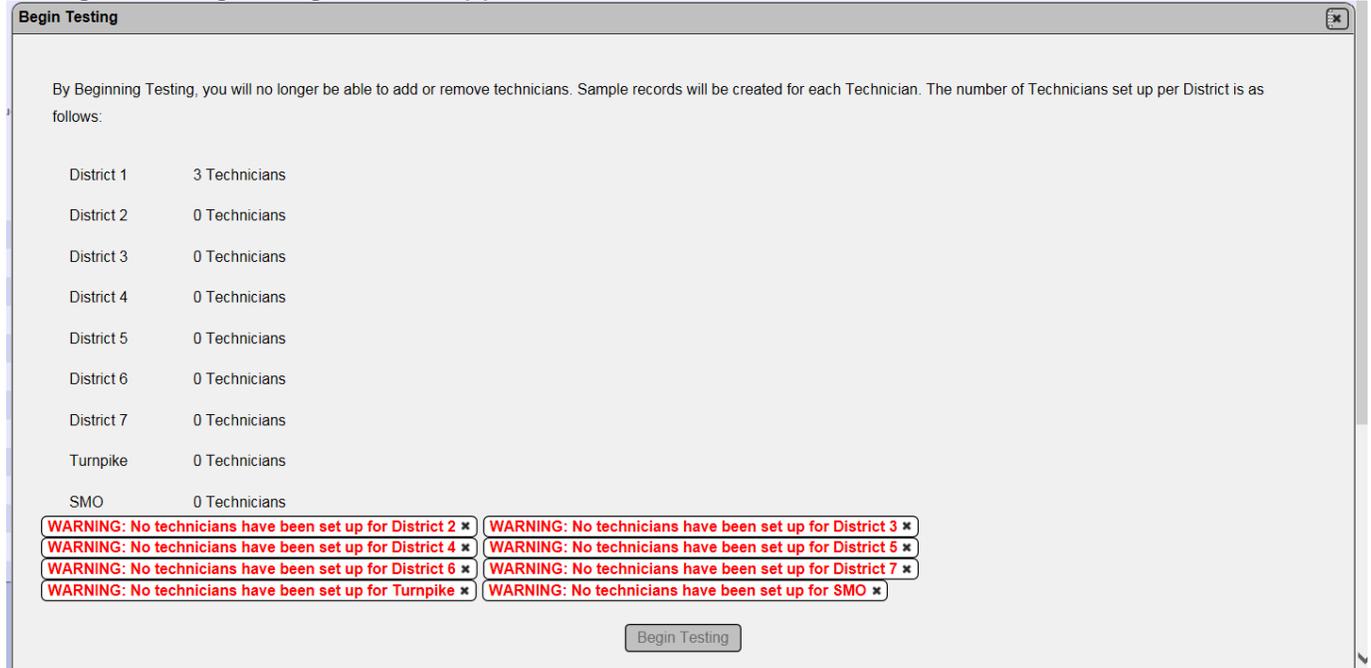
In order for technicians to be able to enter their test data, the State Materials Office must initiate the sample testing phase. The link will not show until at least 3 technicians are listed on the proficiency sample package. The State Materials Office will communicate with the District Materials Offices outside of MAC to determine if the districts have completed setting technicians before the Begin Testing is initiated.

To initiate sample testing:



1. Select the Begin Testing option.

A Begin Testing dialog box will appear.



If any districts have not set technicians, there will be a warning message that must be acknowledged before the Begin Testing option is activated. If any such warning messages appear,



2. Click on the x next to the warning.

Technicians

Technicians

Begin Testing

3. When all the warning messages are acknowledged, click on the Begin Testing option.

The proficiency evaluation package status will change to Samples Generated.

You will receive a message that the testing was begun successfully.

Begin Sampling IA Proficiency Package was successful

## Chapter 14 – Marking Technicians as Removed or Refused

While the proficiency sample package is open for testing, PMUs can remove a technician from the original list or mark a technician as refusing to participate. Once the package is closed for testing, this can no longer be done.

### A. Removing a Technician from the Proficiency Sample Package

Turnpike

Contact Person	Cell Phone Number	Office Phone Number
Susan Musselman		(555) 111-2222

Comments

Technicians [1]

Technician	Sample
------------	--------

1. Click on the District tab to expand it.
2. Click on the Technicians sub-tab to expand it.

Technician	Sample	Sample Status	IAProficiency Technician Status	ASTM C39 Compressive Strength	Analysis Status	QPR	QPR Status
DSM001 - State Materials Office							
1 D46574071	1600014571	Submitted for Lab Testing	In Testing	Testing in Progress		<a href="#">Mark Removed</a>	<a href="#">Mark Refused</a>

Showing 1 to 1 of 1

3. Select the Mark Removed option next to the technician you want to remove.

A Marked Removed Removal Reason dialog box will appear.

**Mark Removed**

Removal Reason

- Damaged Sample
- Equipment Issues
- Lab Not Accredited
- Sample Lost
- Technician Does Not Perform This Test
- Technician Not Active
- Other

4. Select the appropriate reason from the dialog box. If the list of standard responses does not cover the removal reason, select Other.

5. If Other is selected, you must provide a removal reason in the Removal Reason Other Text field.
6. Select Save to mark the technician as removed.

You will receive a message that the technician was successfully removed.

Mark IA Proficiency Tech Removed was successful

**NOTE:** Before the State Materials Office initiates the testing, there is a Remove option for the technician. Selecting the Remove option removes the technician as if they were never entered on the package.

DSM001 - State Materials Office			
1	APR 19/2000	Testing Not Started	<a href="#">Mark Removed</a> <a href="#">Mark Refused</a> <a href="#">Remove</a>
2	LSU 7/21/04	Testing Not Started	<a href="#">Mark Removed</a> <a href="#">Mark Refused</a> <a href="#">Remove</a>
3	R20 150/9	Testing Not Started	<a href="#">Mark Removed</a> <a href="#">Mark Refused</a> <a href="#">Remove</a>

After testing is initiated, this option is no longer available and the technician must be accounted for in the package analysis. Selecting the Mark Removed option means the technician remains on the package, but is not included in the final analysis. The technician will not receive a QPR when the testing has been closed.

#### B. Marking a Technician as Refused

1. Click on the District tab to expand it.
2. Click on the Technicians sub-tab to expand it.

Technicians [1] <span style="float: right;">Click to Collapse</span>							
Technician	Sample	Sample Status	IAProficiency Technician Status	ASTM C39 Compressive Strength	Analysis Status	QPR	QPR Status
DSM001 - State Materials Office							
1	D48574071	1600014571	Submitted for Lab Testing	In Testing	Testing in Progress		Mark Removed Mark Refused

Showing 1 to 1 of 1

3. Select the Mark Refused option next to the technician you wish to designate as refusing to participate.

The technician record will be highlighted and the status will change to Refuses Evaluation.

DSM001 - State Materials Office							
1	[REDACTED]	N/A	Refuses Evaluation	In Testing	Testing in Progress		Mark Removed Mark Included

**NOTE:** Technicians marked as refused will receive an unsatisfactory QPR.

C. Including a Removed or Refused Technician

If a technician is inadvertently marked as removed or refused, the action can be undone.

Turnpike

<b>Contact Person</b>	<b>Cell Phone Number</b>	<b>Office Phone Number</b>
Susan Musselman		(555) 111-2222

**Comments**

Technicians [1]

Technician	Sample
------------	--------

1. Click on the District tab to expand it.
2. Click on the Technicians sub-tab to expand it.

On technicians that have been marked removed or refused, an option to mark included will appear.

Refuses Evaluation	Testing in Progress	Mark Removed	Mark Included
--------------------	---------------------	--------------	---------------

3. Select the Mark Included option.

The technician record will be highlighted and the status will change to Submitted for Lab Testing.

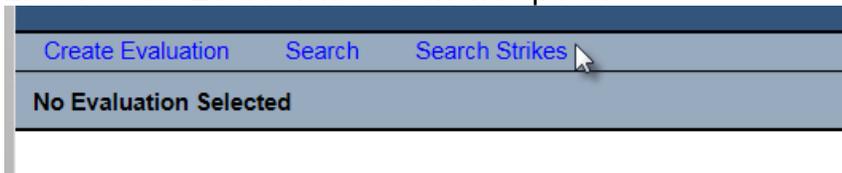
DSM001 - State Materials Office							
1	[REDACTED]	1600014571	Submitted for Lab Testing	In Testing	Testing in Progress		Mark Removed Mark Refused

## Chapter 15 – Managing Strikes

Since strikes are stored on each evaluation record, the manage strikes process allows IA PMUs to review the strikes given and clear them if needed.

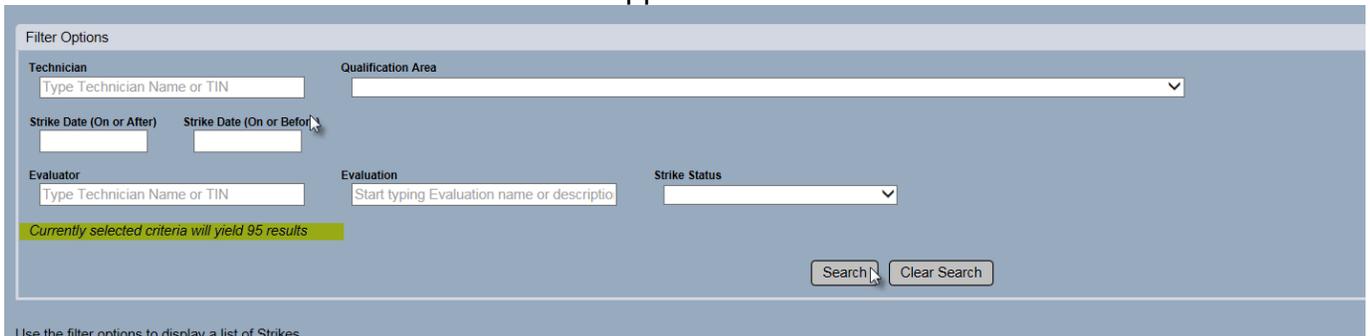


1. Select the Evaluations menu option.
2. Select the Evaluations sub-menu option.



3. Select the Search Strikes option.

The Search Strikes search sub-screen will appear.

A screenshot of the Search Strikes search sub-screen. It features a 'Filter Options' section with several input fields: 'Technician' (with a placeholder 'Type Technician Name or TIN'), 'Qualification Area' (a dropdown menu), 'Strike Date (On or After)' and 'Strike Date (On or Before)' (two date input fields), 'Evaluator' (with a placeholder 'Type Technician Name or TIN'), 'Evaluation' (with a placeholder 'Start typing Evaluation name or description'), and 'Strike Status' (a dropdown menu). A green bar below the filters indicates 'Currently selected criteria will yield 95 results'. At the bottom right, there are 'Search' and 'Clear Search' buttons. Below the form, a small instruction reads 'Use the filter options to display a list of Strikes'.

4. Enter the appropriate filter options to proceed. For example:
  - a. To search for a specific technician, enter the name or TIN in the Technician field. The search will provide all strikes for the technician for all qualifications.
  - b. To search for all the strikes in a specific qualification area, select the qualification area from the Qualification Area dropdown list. The search will provide all strikes to all technicians in that qualification area.
  - c. To search for all strikes for a specific technician in a specific area, select both.
5. Select the Search option.

The sub-screen will be populated with the results.

Technician	Qualification Area	Evaluation	Strike Date	Evaluator	Status		
1	S40062372	Aggregate Testing Technician	0000001625 - ABC1 - ABC Road Company, Inc.	9/19/2016	C65579572	Closed Manually	Reinstate Strike
2	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
3	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
4	S40062372	Concrete Laboratory Technician Level I	0000001658 - A0ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
5	S40062372	Concrete Laboratory Technician Level I	0000001702 - A0ABC1 - ABC Road Company, Inc.	9/20/2016	G52016061	Closed Manually	Reinstate Strike
6	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed Manually	Reinstate Strike
7	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
8	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
9	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
10	S40062372	Aggregate Testing Technician	0000001848 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
11	S40062372	Concrete Laboratory Technician Level I	0000001880 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Active	Clear Strike
12	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	Closed by Satisfactory Evaluation	Reinstate Strike
13	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	Closed by Satisfactory Evaluation	Reinstate Strike
14	S40062372	Concrete Laboratory Technician Level I	0000001995 - ABC1 - ABC Road Company, Inc.	9/29/2016	T64078490	Active	Clear Strike

6. Click on the Status to see a history of the strike status.

A Strike Status History dialog box will appear.

Date	Status	By	
1	9/27/2016	Active	Jeanie Kozak
2	9/28/2016	Closed by Satisfactory Evaluation	PAUL PASSE Technician was given a SATISFACTORY evaluation in Qualification Area Aggregate Testing Technician

Showing 1 to 2 of 2

Technician	Qualification Area	Evaluation	Strike Date	Evaluator	Status		
1	S40062372	Aggregate Testing Technician	0000001625 - ABC1 - ABC Road Company, Inc.	9/19/2016	C65579572	Closed Manually	Reinstate Strike
2	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
3	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
4	S40062372	Concrete Laboratory Technician Level I	0000001658 - A0ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed by Satisfactory Evaluation	Reinstate Strike
5	S40062372	Concrete Laboratory Technician Level I	0000001702 - A0ABC1 - ABC Road Company, Inc.	9/20/2016	G52016061	Closed Manually	Reinstate Strike
6	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed Manually	Reinstate Strike
7	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
8	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
9	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
10	S40062372	Aggregate Testing Technician	0000001848 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Closed by Satisfactory Evaluation	Reinstate Strike
11	S40062372	Concrete Laboratory Technician Level I	0000001880 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Active	Clear Strike
12	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	Closed by Satisfactory Evaluation	Reinstate Strike
13	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	Closed by Satisfactory Evaluation	Reinstate Strike
14	S40062372	Concrete Laboratory Technician Level I	0000001995 - ABC1 - ABC Road Company, Inc.	9/29/2016	T64078490	Active	Clear Strike

7. To clear a strike, select the Clear Strike option.

**NOTE:** Do not use this function to clear a strike from a technician that has a strike cleared by a successful evaluation. The entry of the successful evaluation will clear the strike. Circumstances where this function is used are as follows: 1) If the PMU somehow removed the strike by mistake; 2) If the Technician got suspended with 3 strikes and then afterwards met the requirements set by the DMRE, SCE, and STA for removal of strikes.

Technician	Qualification Area	Evaluation	Strike Date	Evaluator	Status		
1	S40062372	Aggregate Testing Technician	0000001625 - ABC1 - ABC Road Company, Inc.	9/19/2016	C85579572	Closed Manually	<a href="#">Reinstate Strike</a>
2	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
3	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
4	S40062372	Concrete Laboratory Technician Level I	0000001658 - A0ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
5	S40062372	Concrete Laboratory Technician Level I	0000001702 - A0ABC1 - ABC Road Company, Inc.	9/20/2016	G52016061	Closed Manually	<a href="#">Reinstate Strike</a>
6	S40062372	Aggregate Testing Technician	0000001627 - ABC1 - ABC Road Company, Inc.	9/20/2016	H25072763	Closed Manually	<a href="#">Reinstate Strike</a>
7	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
8	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
9	S40062372	Aggregate Testing Technician	0000001854 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
10	S40062372	Aggregate Testing Technician	0000001848 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
11	S40062372	Concrete Laboratory Technician Level I	0000001880 - ABC1 - ABC Road Company, Inc.	9/27/2016	A25043976	Active	<a href="#">Clear Strike</a>
12	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
13	S40062372	Aggregate Testing Technician	0000001932 - ABC1 - ABC Road Company, Inc.	9/29/2016	B26044250	<a href="#">Closed by Satisfactory Evaluation</a>	<a href="#">Reinstate Strike</a>
14	S40062372	Concrete Laboratory Technician Level I	0000001995 - ABC1 - ABC Road Company, Inc.	9/29/2016	T64078490	Active	<a href="#">Clear Strike</a>

8. If a strike is inadvertently cleared and needs to be reinstated, select the Reinstate Strike option.