

PS&E Checklist in ATLAS Workbench

Quick Reference Guide for NCDOT Project Teams, Managers, & PEFs

Last Updated: 4/24/2026

Purpose

The PS&E (Plans, Specifications, & Estimates) Checklist Modernization integrates ATLAS Workbench into the PS&E process to improve project predictability, efficiency, and collaboration. A complete and approved PS&E checklist is required by FHWA to authorize project funding and advertisement. Completion of the PS&E checklist initiates Contract Standards review activities and supports BOT and FHWA funding approvals. Incomplete PS&E submissions may require conditional approvals that can take months and may impact advertisement schedules.

PS&E Turn-In is a critical business process that begins the Contract Standards review clock, supports funding authorization, and enables timely advertisement. A complete PS&E package is needed for NCDOT to be compliant with FHWA's funding authorization requirements. Automating PS&E reviews ensures projects are completed accurately and on time, protecting funding eligibility and keeping let schedules on track.

This process ensures:

- Refinement and standardization of naming, storage, and tracking of key deliverables needed for successful PS&E packages from 15 months to letting.
- Improved data quality by collecting information from the source and governing its capture.
- Centralized accessible reporting of deliverable status for project teams and leadership.
- The data that is produced is as intelligent as it can be.

Anticipated outcomes:

- Automation of the PS&E process to support project teams and Contract Standards staff.
- Increased efficiency in reporting and status tracking, allowing meetings to focus on resolving issues rather than collecting updates.
- Program-level insights into delivery challenges.
- Consistent naming and storage of project documents with metadata.

Access ATLAS Workbench

- Log into [Preconstruction Home](#) page on Connect and navigate to your project site.
- Open ATLAS Workbench by...
 - Disciplines & Team Collaboration > ATLAS Tools collapsed section > ATLAS Workbench
- Sign in using your NCID.
- In Workbench, scroll down the left-hand menu to PS&E Checklist tabs. Upon selecting a tab, use the "+" to expand the collapsed sections.

3 Key Steps

1. Establish Required Deliverables

- Project Managers with Project Team answer Yes/No questions – Navigate through each section of the PS&E checklist tabs.

- Indicate if deliverable is expected for the project by selecting Yes or No radio button.
- Click the “Save” button at the top or bottom of the page.
- This should be done initially when developing the scope with the Design firm.
- Answers can be updated as more information is made available during project development.

2. Upload Final Deliverables

- Project Team members upload final deliverable as they are completed. Navigate to the relevant section in the PS&E checklist tab.
 - Click the “Browse” button beside the upload box for the expected deliverable. If adding files to existing Document Sets, click the “Add More Files” button.
 - Navigate to and select the file. Click “Save” at the top or bottom of the page after uploading files.
 - Indicate Final plans as completed and uploaded in SharePoint by selecting the Yes radio button.
 - SME enters name and date of acceptance.
 - Click “Save” when entries are completed.
 - Final Plans are still uploaded directly to SharePoint (Let Prep folder) per current process.

3. Monitor in Power BI

- Navigate to the dashboard via the link on the Preconstruction Home page located on the right-hand side of the screen under Preconstruction Announcements: [ATLAS PS&E Checklist Dashboard](#).
 - Click on the “PS&E Checklist by Projects” page in the dashboard.
 - Filter to your project using the box at the top right.
 - View required deliverables, links to uploaded documents, SME information, expected documents, etc.

Additional Details

- Review dashboard regularly; follow up on gaps promptly.
- Use dashboard data to prepare for PS&E turn-in and 15-Month Let List.
- Contact PM/Discipline lead/PEF about missing documents and update ATLAS promptly; however, the entire PS&E Checklist must be filled out prior to submitting the 100% PS&E package.
- If you have trouble accessing ATLAS, email your NCID to ATLAS@ncdot.gov.
- If you don’t have access to the PS&E Dashboard, it will prompt you to request access.
- The dashboard is updated daily by 5:00 pm with all changes made by 4:00 pm in the ATLAS Workbench. Multiple daily dashboard refreshes should be implemented by April 2026.
- Please contact finalplans@ncdot.gov if you need to add something to a project site after the site is locked.