



ATLAS WORKBENCH PS&E CHECKLIST

Guidance for Plan Review

Last Update Date: 4/24/2026

This is a living document and updated regularly.



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Introduction & Purpose

The Plans, Specifications, and Estimates (PS&E) Checklist is now integrated into the ATLAS Workbench to modernize and streamline the plan review process for central let projects. This digital integration replaces the former paper-based checklist and creates a centralized, automated system that supports a more accurate, timely, and consistent approach to PS&E turn in and review.

An approved PS&E checklist is strictly required by FHWA for all funding requests, and projects must appear fully ready on the Project Letting Status Report before funding can be allocated. FHWA is adhering more strictly to funding authorization requirements, which makes a complete PS&E more critical than ever. PS&E turn in initiates the Contract Standards review time clock and incomplete PS&E submissions may require conditional FHWA approvals that can take several months and delay advertisement. Automating PS&E reviews ensures projects are completed accurately and on time, protecting funding eligibility and keeping let schedules on track.

This integration also supports NCDOT's broader goal of improving delivery of the 12-Month Let List by enabling better assessment of project readiness prior to entering the list and clearer visibility into completeness once included.

ATLAS Workbench, Power BI, and Bluebeam (or other digital collaboration tool) work together to ensure that Plans & Standards staff can effectively verify deliverables, perform thorough technical reviews, and maintain high-quality documentation throughout the PS&E process.

Role of Plans and Standards

Plans and Standards staff are responsible for two critical tasks in the PS&E process:

1. **Checklist Verification:** Confirm that all required deliverables listed in the PS&E Checklist have been submitted through ATLAS.
2. **Plan Review:** Conduct a detailed technical review of plan sheets for accuracy, compliance, and quality using Bluebeam or another digital review tool. Reviewers provide clear, actionable comments and ensure these comments are uploaded into ATLAS Workbench for project visibility and recordkeeping.

Why ATLAS Workbench?

Historically, plan review relied on paper checklists and manual document exchanges, making it difficult to track progress, ensure completeness, and maintain version control. The ATLAS Workbench addresses these challenges by:

- **Centralizing Deliverables:** All PS&E documents, special provisions, supporting correspondence, and required approvals are stored in one location, reducing time spent searching for files.
- **Automating Tracking:** The digital checklist within ATLAS provides real-time visibility into document status, ensuring reviewers can quickly confirm completeness.
- **Standardizing Processes:** Built-in naming conventions and governance rules ensure that final versions are properly organized and accessible for review.

Benefits for Plan Review Staff

- Efficiency: Eliminates manual emailing and paper checklists, reducing administrative burden.
- Accuracy: Ensures that reviewers have access to the latest approved documents, minimizing errors and omissions.
- Transparency: Data captured in ATLAS feeds into Power BI dashboards, enabling leadership to monitor PS&E readiness and identify potential risks early.

This integration supports the Plans and Standards mission to deliver high-quality, complete PS&E packages that meet NCDOT standards and deadlines, while reducing the likelihood of addenda and delays during contract development.

Key Terms and Definitions

Understanding the terminology used in the PS&E review process is essential for consistency, accuracy, and efficiency. The integration of the PS&E Checklist into ATLAS Workbench introduces new tools and workflows that differ significantly from the previous paper-based process. Clear definitions ensure that all reviewers share a common understanding of the systems, expectations, and responsibilities involved.

- **ATLAS Workbench:** A centralized digital platform used by NCDOT to manage project deliverables. ATLAS Workbench serves as the authoritative repository for PS&E documents, plan sets, supporting materials, and required approvals. For plan review, ATLAS provides access to all submitted deliverables and is the designated location for uploading final plan review comments exported from Bluebeam.
- **PS&E (Plans, Specifications, and Estimates):** The complete package of final plans, specifications, and supporting documents required for project advertisement and letting. Through plan review, Plans & Standards staff ensure these materials meet NCDOT standards and are complete prior to contract development.
- **PS&E Checklist:** A digital, automated checklist within ATLAS Workbench that tracks the status of required deliverables for each project. Reviewers use the checklist to confirm all required items have been submitted. This checklist replaces the previous paper-based process and provides real-time visibility into completeness and readiness.
- **Power BI Dashboard:** A reporting tool connected to ATLAS that displays real-time visibility into PS&E readiness. Reviewers use the PS&E Checklist dashboard to verify that all required documents are uploaded, plan sets are marked complete with SME acceptance, and any missing items are identified before beginning technical review.
- **Bluebeam:** A PDF-based review and markup tool used by Plans & Standards staff to conduct detailed plan reviews. Bluebeam enables reviewers to annotate individual plan sheets, provide clear and actionable comments, track responses, and export a consolidated comment file for upload into ATLAS Workbench under the Plan Review Comments control.

Plan Review Expectations

Plan Review staff play a critical role in ensuring the quality and completeness of PS&E packages. Expectations include:

- **Completeness:** Verify that all required documents listed in the PS&E Checklist are present and properly named.
- **Accuracy:** Check that plans comply with NCDOT standards, specifications, and design requirements.
- **Consistency:** Ensure that plan sheets, summaries, and estimates align across disciplines (roadway, structures, utilities, etc.).
- **Timeliness for Responding to Plan Checking Comments:** Complete reviews within the allotted timeframe (typically 5 days for initial review, 2–3 days for recheck).
- **Documentation:** Ensure that clear, actionable comments and upload exported comments to ATLAS Workbench for recordkeeping.

Roles & Responsibilities

Clear roles and responsibilities ensure that PS&E Checklist verification and ATLAS Workbench usage support accurate, timely plan reviews and readiness for contract development.

Plans & Standards Review Responsibilities

Plans & Standards Reviewers ensure the technical accuracy, completeness, and quality of PS&E packages.

- Checklist Verification
 - Confirm that all required PS&E deliverables listed in the ATLAS Workbench checklist have been submitted.
 - Ensure documents follow required naming conventions and are stored correctly within ATLAS.
- Plan Review
 - Perform detailed technical review of plan sheets for compliance with NCDOT standards, specifications, and design requirements.
 - Use Bluebeam to provide clear, actionable comments, referencing standards when possible.
 - Evaluate alignment across plan sheets, summaries, estimates, and supporting documents.
- Review Responsibilities
 - Verify cross discipline completeness and consistency (roadway, structures, utilities, etc.).
 - Document findings and upload exported Bluebeam (or other digital collaboration tool) comments into ATLAS Workbench under the Plan Review Comments control.
- Timeliness for Responding to Plan Checking Comments
 - Complete the initial review within 5 business days.
 - Complete rechecks within 2–3 business days after receiving revised plans.
- Communication
 - Coordinate with PMs and design teams to resolve discrepancies efficiently.
 - Escalate significant issues, missing deliverables, or schedule risks to leadership.

Project Manager (PM) Responsibilities

PMs are the owners of the PS&E Checklist and are accountable for overall PS&E readiness.

- Checklist & Deliverable Ownership
 - Own and manage the PS&E Checklist throughout the project lifecycle.
 - Direct SMEs and discipline leads to complete checklist items and ensure accurate responses.
 - Monitor ATLAS Workbench **daily** to track deliverable status and follow up on gaps or missing items.
 - Maintain the Incomplete Items tab in ATLAS Workbench to document incomplete PS&E deliverables, required actions, responsible parties, and expected completion dates for FHWA and program-level visibility.
- Readiness & Scheduling
 - Confirm that review can occur 2–4 weeks prior to the PS&E date.
 - Validate project readiness for inclusion on the 15-Month Let List (15MLL), including:
 - ROW acquisition status
 - Utility coordination and certifications
 - Environmental permits
 - Municipal agreements
 - Design estimates and quantity verification
- Coordination
 - Ensure PEFs, SMEs, and internal review teams understand expectations, timelines, and required deliverables.
 - Communicate status, gaps, or risks to leadership as needed.

PEF & Project Team Responsibilities

PEFs and internal project teams support PMs by providing accurate information and timely deliverables.

- Checklist Support
 - Assist the PM in answering PS&E Checklist questions accurately, especially during 15MLL readiness checks.
- Document Submission
 - Upload final documents directly into ATLAS Workbench in the correct format, location, and naming convention.
 - Provide deliverables as they are ready, not all at once or at the last minute, to allow timely review and reduce rework.
- Collaboration
 - Respond promptly to reviewer comments and resubmittal requests.
 - Coordinate with PMs and reviewers to maintain accuracy and completeness across disciplines.

Accessing and Utilizing Power BI

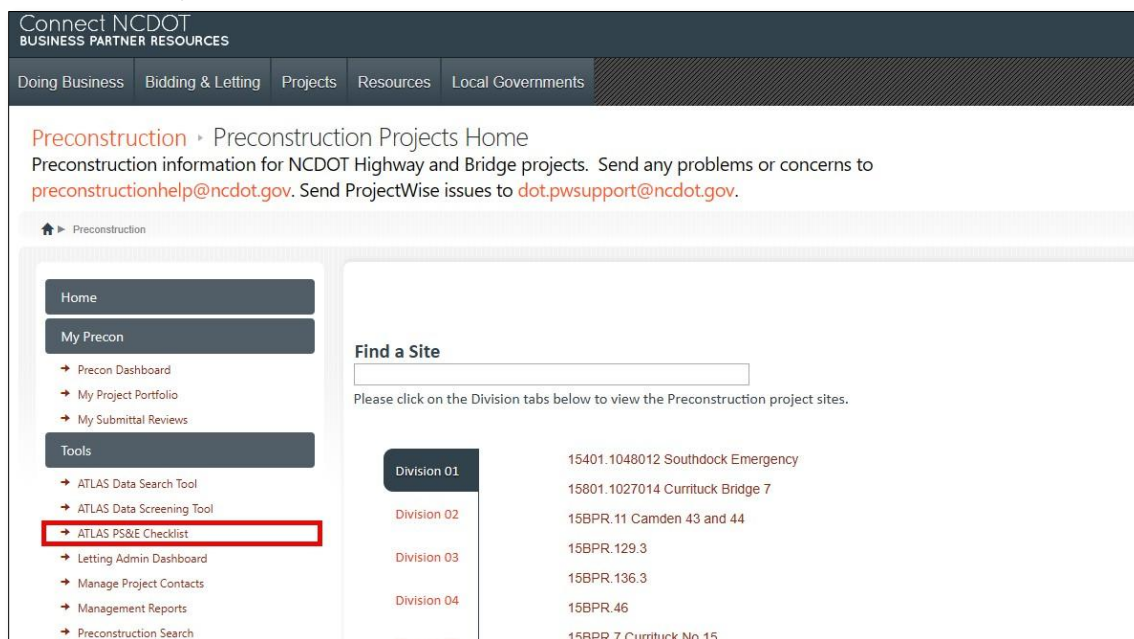
Power BI dashboards provide a quick and reliable way for Plan Reviewers to verify that all PS&E checklist items and required documents have been uploaded before beginning plan review. This step ensures that the review process starts with a complete set of deliverables, reducing delays and minimizing the need for repeated follow-ups.

Purpose

- Confirm that all PS&E Checklist items in ATLAS Workbench are marked complete.
- Verify that required documents and plan sets have been uploaded and are accessible.
- Identify missing or incomplete items before initiating technical review in Bluebeam (or other tool).
- Provide visibility into readiness for 15MLL and PS&E milestones.

Access Instructions

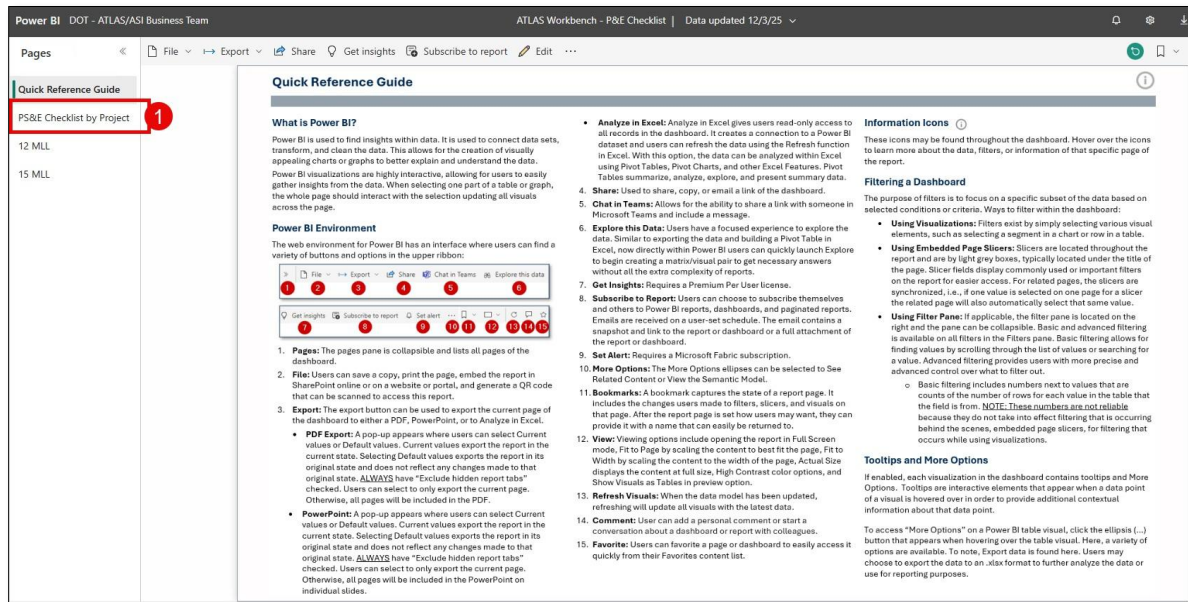
- Dashboard Link: [ATLAS Workbench – PS&E Checklist Dashboard](#)
 - Or, access the dashboard via NCDOT Connect under Tools:



- Login: Use your NCDOT credentials to access the dashboard.
- Request Access: If you do not have access, click Request Access in Power BI.
- Data Refresh: Dashboard data updates daily by 5:00 PM for changes made by 4:00 PM (15-minute refreshes targeted for future implementation).
- Data Sources: Information displayed comes from ATLAS Workbench and SAP, ensuring accuracy and alignment with project records.

Steps to Utilizing Power BI

1. Log in to Power BI
 - a. Navigate to the PS&E Checklist Dashboard and access the report by using your credentials.
 - b. The landing page of the report is a Quick Reference Guide that details using Power BI.
 - c. There are multiple pages in the dashboard; navigate to the PS&E Checklist by Project page in the left-hand menu.



2. Project Selection for PS&E Checklist Review
 - a. Use the dashboard filters to select the project you are reviewing.
 - b. Confirm that the project details appear appropriately across the top of the report.

Power BI DOT - ATLAS/ASI Business Team | ATLAS Workbench - P&E Checklist | Data updated 12/1/25

Pages: PS&E Checklist by Proj...

PS&E Checklist — By Project

2a Project: HN-0023

2b

Division	County	Project Description	Project Manager	Letting Date
06	COLUMBUS	US 701 BUSINESS (MADISON STREET) ST SR 1916 (LEE STREET) AND SR 1953...	CRAIG FREEMAN	02/18/2026

Group	Section	Header	Question	Answer	Expected Documents	Link	Comments	SME	Accepted Date	Quantities			
Key Documents	Agreements	Utility	Are Utility Agreements required?	Yes	City of Whiteville Use and Occupancy								
			Rail	Are Rail Agreements and Special Provisions required?	No								
			Municipality										
Certifications	Other	Utility	Is Utility Certification required?	Yes									
			Rail	Is Rail Certification required?	Yes								
			ROW (or ROW Field Cert. Form)	Is ROW Certification required?	Yes								
Regulatory Approvals	Section 7 End Species Consultation	Other	Are Section 7 End Species Consultation Regulatory Approvals required?	No									
			Are Section 7 End Species Consultation Regulatory Approvals completed?	No									
			104 Consultations (Cultural Resource)	Are 104 Consultations (Cultural Resource) Regulatory Approvals required?	No								
			NEPA/CEM or SFC – one for each crossing (FEMA)	Are NEPA/CEM or SFC Regulatory Approvals required?	No								
			DEQ Water Permit (From Municipality)	Are DEQ Water Permit (From Municipality) Regulatory Approvals required?	No								
			DEQ Sewer Permit (From Municipality)	Are DEQ Sewer Permit (From Municipality) Regulatory Approvals required?	No								
			Permits	Are Permits/Regulatory Approvals required?	Yes	General 401							
				Are Permits/Regulatory Approvals completed?	No								
			Signed Environmental Document	Signed Environmental Document	Is Signed Environmental Document required?	Yes							
					Are Signed Environmental Document complete?	Yes							
NEPA/SEPA Consultation	NEPA/SEPA Consultation	NEPA/SEPA Consultation	Is NEPA/SEPA Consultation – ROW Consultation required?	No									
			Is NEPA/SEPA Consultation – Construction Consultation required?	Yes									
Design Exceptions Documented and Approved	Design Exceptions Documented and Approved	Design Exceptions Documented and Approved	Are Design Exceptions required?	No						HN-0023 Design Exceptions Checklist			
			Are Design Exceptions completed?	No							HN-0023 Traffic Estimate		
Final Plan Sets	Plan Set Type	100 Roadway Plans	Are 100 Roadway Plans required?	Yes									
			Are 100 Roadway Plans completed?	No						Plan Approved	100		
Final Plan Sets	Plan Set Type	100 Roadway Plans	Are 100 Roadway Special Provisions required?	No									
			Are 100 Roadway Special Provisions completed?	No									

3. Review Key Indicators

- To review the dashboard, read the matrix left to right. Groups indicate the eight groups that satisfy the PS&E: Key Documents, Final Plan Sets, Plan Review Comments, Correspondence Docu-set Documents, Roadway Supporting Documents, ICT's, Additional Information, and Incomplete Items. After the Groups, the PS&E Checklist drills all the way down to the Questions asked that PMs/PEFs must answer, and then everything right of the dividing bar in the matrix are their responses and uploads.
- Required vs. Completed Status: Each deliverable shows whether it is required and whether it is completed in the Answer column.
 - TIP: Look for any items marked "Yes" where the question asks if the deliverable is required but "No" under where the question asks if the deliverable is completed. These indicate missing documents. Filters exist on the right hand side of the page if you would like to filter the answers.
- Plan Set Completion: Confirm that all required plan sets (e.g., 100 Roadway Plans, 200 Transportation Management Plans, 230 Erosion Control Plans, 250 Signing Plans, etc.) are marked complete with SME name, sign off date, and quantities tool selection completed.
- Supporting Documents and Certifications: Verify that required certifications (e.g., ROW Certification, Utility Certification, Rail Certification) and supporting documents (e.g., Calculation of Quantities, Earthwork Logs, Cost Estimate Sheets) are uploaded and marked complete.
 - TIP: Given the length of the checklist, use the scroll bars on the side and bottom of your screen to evaluate the whole checklist.
- Special Provisions and Design Criteria: Check that any required special provisions and approved design criteria documents are present.

- TIP: When applicable, Final Plans MUST still be uploaded to the Let Prep folder directly in Connect/SharePoint. This is the only upload that needs to occur outside of ATLAS Workbench and must be reviewed from SharePoint. If a final plan is selected as “Yes” when asked if the deliverable is complete, then you should expect to find the Final Plan in SharePoint.
- f. To navigate to the deliverables on SharePoint, select the hyperlink icon under the Links column.
 - TIP: Single document upload links open directly, and document set upload links open the SharePoint Document Set location.
- g. Comments and Notes: Review any comments notes included in the report for context on missing or pending items.

ATLAS Workbench - P&E Checklist | Data updated 12/3/25

PS&E Checklist — By Project

Project: HN-0023

Division	County	Project Description	Project Manager	Letting Date
06	Columbus	US 701 BUSINESS (MADISON STREET) ST SR 1916 (LEE STREET), AND SR 1953...	CRAIG FREEMAN	02/18/2026

Group	Section	Header	Question	Answer	Expected Documents	Link	Comments	SME	Accepted	Quantities
Key Documents	Agreements	Utility	Are Utility Agreements required?	Yes	City of Whiteville Use and Occupancy					
		Rail Municipality	Are Rail Agreements and Special Provisions required?	No						
		Other								
	Certifications	Utility	Is Utility Certification required?	Yes						
		Rail	Is Rail Certification required?	Yes						
		ROW (or ROW Field Cert. Form)	Is ROW Certification required?	Yes						
		Other	Is Other Certification required?	No						
	Regulatory Approvals	Section 7 End. Species Consultation		Are Section 7 End. Species Consultation Regulatory Approvals required?	No					
				Are Section 7 End. Species Consultation Regulatory Approvals documents complete?	No					
		106 Consultations (Cultural Resources)	Are 106 Consultations (Cultural Resources) Regulatory Approvals required?	No						
		NFIP/CLOMR or SFC – one for each crossing (FEMA)	Are NFIP/CLOMR or SFC Regulatory Approvals required?	No						
		DEQ Water Permit (From Municipality)	Are DEQ Water Permit (From Municipality) Regulatory Approvals required?	Yes						
		DEQ Sewer Permit (From Municipality)	Are DEQ Sewer Permit (From Municipality) Regulatory Approvals required?	No						
	Signed Environmental Document	Signed Environmental Document		Are Permits/Regulatory Approvals required?	Yes	General 401				
				Is Signed Environmental Document required?	Yes					
			Are Signed Environmental Document complete?	Yes						
NEPA/SEPA Consultation	NEPA/SEPA Consultation		Is NEPA/SEPA Consultation — ROW Consultation required?	No						
			Is NEPA/SEPA Consultation — Construction Consultation required?	Yes						
Design Exceptions Documented and Approved	Design Exceptions Documented and Approved	Are Design Exceptions required?	No			HN-0023 Design Exception Checklist				
Traffic Forecast	Traffic Forecast	Is Traffic Forecast required?	Yes			HN-0023 Traffic				
Final Plan Sets	Plan Set Type	100 Roadway Plans	Are 100 Roadway Plans required?	Yes						
			Are 100 Roadway Plans completed?	No				Hen Nguyen	PIG	
		100 Roadway Special Provisions								
	150 Right of Way	Are 150 Right of Way required?	Yes							

4. Take Action if Needed

- Notify the Project Manager of any missing or incomplete checklist items.
- Do not begin Bluebeam review until all Final Plans are confirmed complete in the dashboard and verified in SharePoint.

Best Practices

- Use filters to narrow down to your assigned projects for efficiency.



- Document any discrepancies and communicate promptly with the PM team.

Accessing & Utilizing ATLAS Workbench for Plan Review

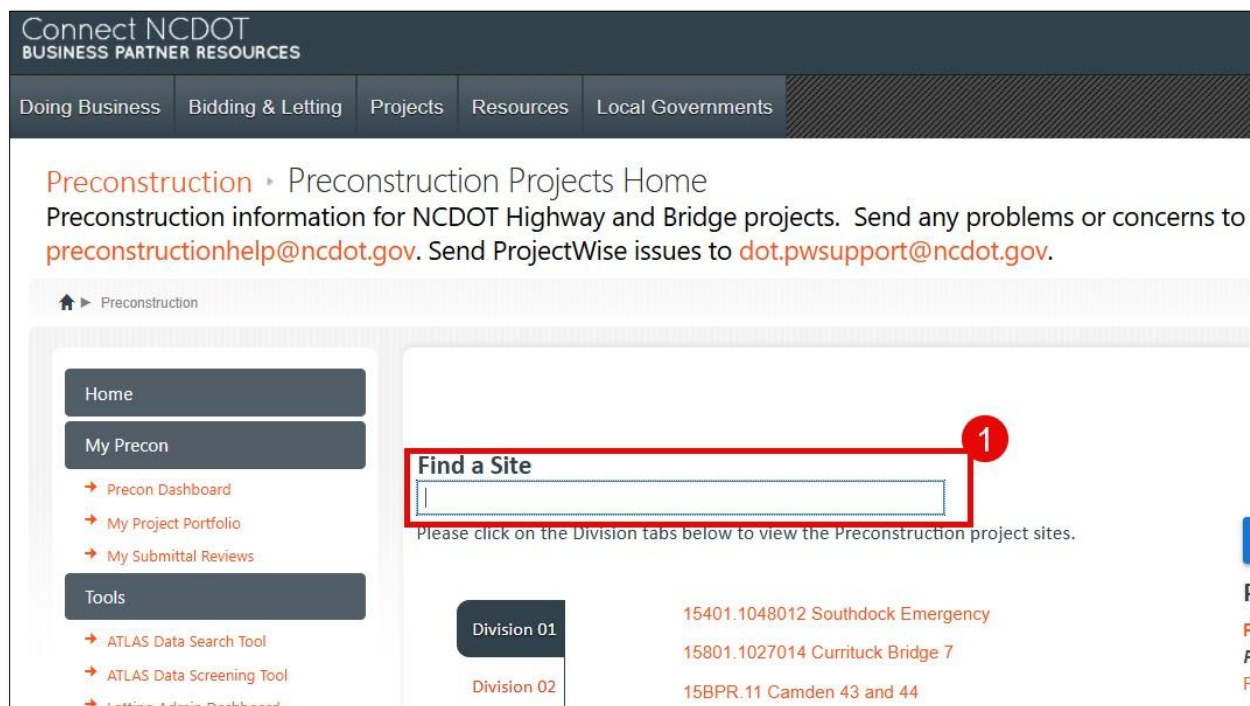
ATLAS Workbench is a project-specific application, meaning all information within Workbench is tied to a specific project. To access Workbench, you must navigate to the Project's site on Connect for the project you are working on. You cannot access ATLAS Workbench without first selecting a project in Connect. ATLAS Workbench serves as the centralized platform for storing PS&E deliverables and related documentation. For Plans and Standards Reviewers, the primary interaction with ATLAS occurs after completing plan review in Bluebeam. At this stage, Reviewers upload their exported comments to ensure all feedback is documented and accessible for reference.

Purpose

- Provide a permanent record of plan review comments.
- Ensure transparency and accessibility for project teams and leadership.
- Support reporting and historical tracking of review feedback.

Step-by-Step Instructions

1. Log into Connect
 - Go to the NCDOT **Connect SharePoint portal** and log in using your NCDOT credentials.
 - Navigate to the **specific project site** for your project.



Connect NCDOT
BUSINESS PARTNER RESOURCES

Doing Business | Bidding & Letting | Projects | Resources | Local Governments

Preconstruction ▸ Preconstruction Projects Home
Preconstruction information for NCDOT Highway and Bridge projects. Send any problems or concerns to preconstructionhelp@ncdot.gov. Send ProjectWise issues to dot.pwsupport@ncdot.gov.

Preconstruction

Home

My Precon

- Precon Dashboard
- My Project Portfolio
- My Submittal Reviews

Tools

- ATLAS Data Search Tool
- ATLAS Data Screening Tool
- Letting Admin Dashboard

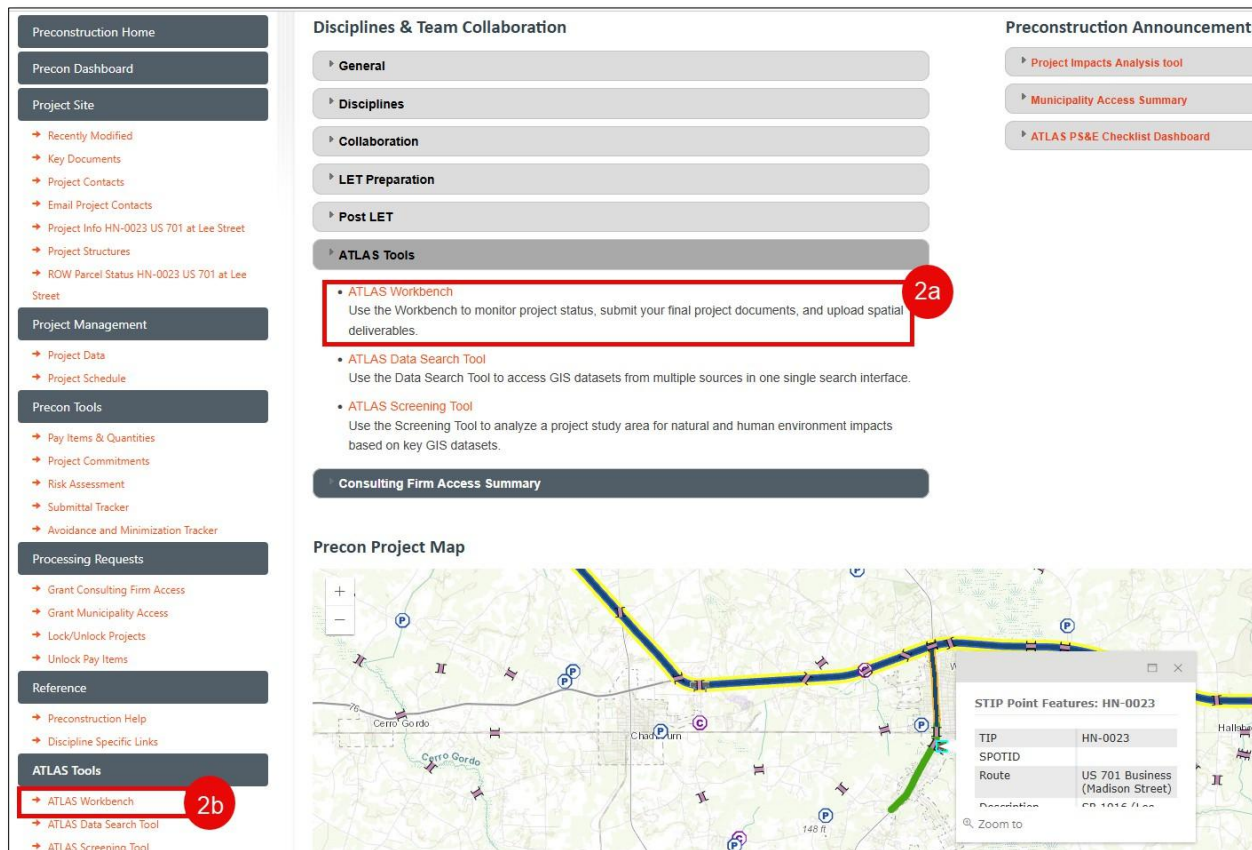
Find a Site

Please click on the Division tabs below to view the Preconstruction project sites.

Division 01	15401.1048012 Southdock Emergency
	15801.1027014 Currituck Bridge 7
Division 02	15BPR.11 Camden 43 and 44

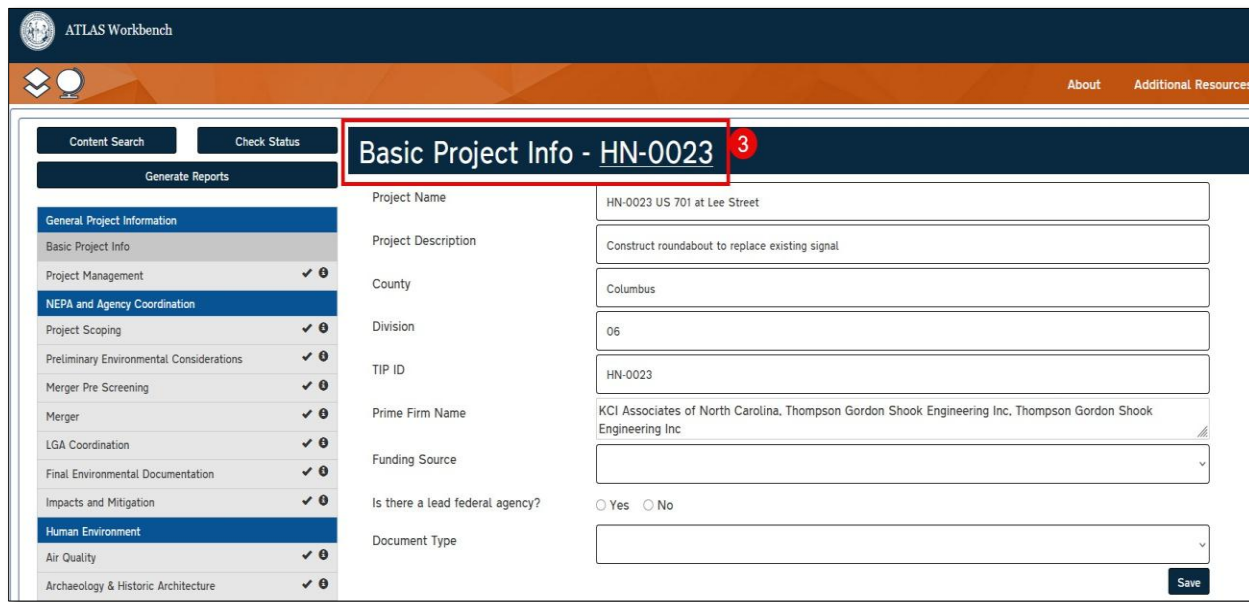
2. Locate ATLAS Workbench

- Once inside the project site, you can access ATLAS Workbench in one of two ways:
 - Option 1: From the left-hand ribbon, scroll down to the ATLAS Tools section and click ATLAS Workbench.
 - Option 2: From the center of the screen, expand the ATLAS Tools collapsed menu under the Disciplines & Team Collaboration section, and click ATLAS Workbench.



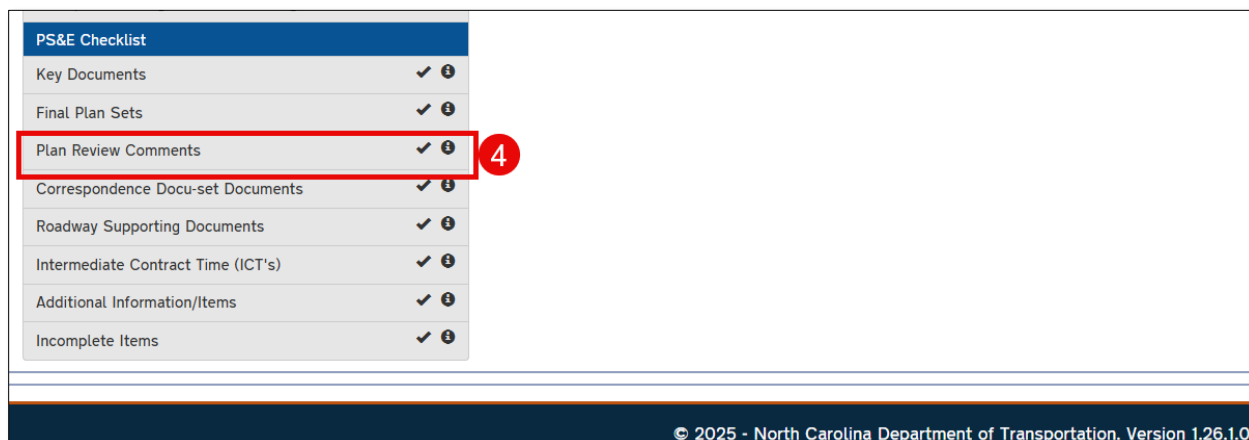
3. ATLAS Workbench Basic Project Info

- Ensure you are in the correct project site before opening Workbench. When you select ATLAS Workbench for a specific project, you are first directed to the Project's Basic Info page in ATLAS Workbench. All data and deliverables uploaded in Workbench are tied to the selected project.



4. Locate the Plan Review Comments Tab

- Once inside ATLAS Workbench, navigate to the PS&E Checklist tabs from the left menu (located at the bottom of the page).
- Select the Plan Review Comments Tab. This is the designated page for submitting your exported Bluebeam comments.



5. Upload Exported Comments

- a. Expand the Plan Review Comments section
- b. Click "Browse" and select the exported file from Bluebeam
- c. Select Save at the top or bottom of your screen
 - **TIP:** ATLAS Workbench will enforce the correct naming convention to the PDF upload.



6. Verify Upload

- Ensure the file appears in the upload control after you select Save.
- Once the dashboard is refreshed (see [Appendix](#) for refresh schedule), verify that the Plan Review Comments appear in the PS&E Checklist dashboard.

Appendix

The following section provides supporting documentation or links related to the PS&E Checklist, ATLAS Workbench, ATLAS Data, or Power BI.

1. [Original PS&E Checklist](#)
2. **Uploading Files in ATLAS Workbench:** When you upload a file to ATLAS Workbench, it automatically saves the file to the project's project site on Connect. Uploading these files to ATLAS Workbench ensures that files are saved with the correct naming convention and correct metadata, and key document tags are assigned in the project record.
 - For a comprehensive list of ATLAS Workbench final deliverables, please view the [ATLAS Workbench Standards](#).
3. [ATLAS Workbench – PS&E Checklist Dashboard](#)
4. **ATLAS Data:** Configuration and application data from ATLAS tools is exported to Microsoft Access Database daily. The ATLAS Business uses the data to generate reports and build dashboards in Power BI. Due to the nature of the Database, currently dashboards are not connected to live data and the ATLAS Workbench – PS&E Checklist Dashboard is typically refreshed every weekday by 5:00 PM EST.
5. Please contact finalplans@ncdot.gov if you need to add something to a project site after the site is locked.
6. To print the Power BI Dashboard, select Export > PDF > Only Export Current Page.