

Summary of changes:

All users

Amendments must be approved in order -[spreadsheet # 14](#)

[Redistribution contract invoices \(journal vouchers\) are now entered directly in CARS](#)

[Invoice search now includes "Paid Special" status](#)

Invoice type indicators for subconsultant (S, A, CM) are corrected -[18](#)

Contract maximum is saved (frozen) when an invoice is submitted -[28](#)

Indirect cost (overhead) rate is saved (frozen) when an invoice is submitted -[29](#)

Indirect cost (overhead) rate adjustments are shown on the invoice -[31](#)

WisDOT

[Changes were made to the View PO Lines per Project page](#) -[2, 24, 35](#)

[Regional Administrators can assign DOT roles directly from the contract record](#)

LPM

Evaluation links are functional on the dashboard -[6](#)

Consultants

Consultants can view uploaded contract documents -[1](#)

Invoice notifications by email are turned on again -[7](#)

Include Subconsultant Invoice list on an invoice is limited to one item per subconsultant -[8, 11](#)

Back button from subcontract invoices for prime consultants has been added -[9](#)

Consultant security lists now show the contracts sorted in ascending order -[23](#)

[New XML Schema to allow XML invoicing for redistribution contracts](#)



Redistribution invoices are entered directly in CARS

Project allocations for redistribution contracts (formerly called journal vouchers) are now entered directly in CARS. Form DT1511 is no longer required, but you may continue to include it as part of the invoice documentation. Only contracts paid on specific rate and cost per unit payment types may be redistribution contracts ([FDM 8-10-15](#), [FDM 8-15-2.1](#)). When the **Redistribution Contract** identifier is “yes” on the contract record, redistribution information must be entered in CARS. All of the expenses entered as labor and costs must be allotted to other projects. The labor and cost expenses must exactly balance the amounts redistributed to other projects.

Identifying Redistribution Contracts

A new field in the Contract (or Work Order) Information section on the prime consultant’s or WisDOT’s View Contract (or Work Order) page identifies redistribution contracts.

Work Order Information	
Work Order Number: 5	Purchase Order Number:
Project ID: 3926-75-30	Contract Function: Construction Services
Contract Type: Work Order	Federal Funding %: 20.00
Period Start Date:	Program Code: 2034
Party: 2	ARRA: No
Party Type:	DBE \$ Goal: \$0.00
Status: Active	DBE % Goal: 0.00
Limits: Specific Rate Redistribution	Current DBE %: 0.00
Highway: SR WO ReD	Total DBE Cost: \$0.00
County: Clark	DBE Waiver: No
Region/Bureau: BPD	Anticipated Authorized Date:
Workorder Cancel Date:	Program Management: DOT
Fixed Fee%: 8.00	Redistribution Contract: Yes
Std Overhead Rate %: 150.00	
Total Invoice: \$0.00	
Closed Date:	
Evaluation Needed:	



Entering Redistribution Invoices

1. Create a new invoice, and enter labor and cost information as you normally do for an invoice.

Note: Until you enter incurred costs on the invoice, there will be no controls for entering redistribution information. Once you click **Edit** and go back, the controls are displayed.

Specific Rate
 DBE: No, OH Rate: Home Office, Function: Construction Services [Edit](#)

Incurring This Invoice:	0.00	
Previously Incurred Paid Invoice(s):	0.00	
Previously Incurred Pending Invoice(s):	0.00	

Incurring to Date:	0.00	
Contract Maximum:	25,000.00	
Subject to Maximum:		0.00
Previously Paid:	0.00	
Pending Payment(s):	0.00	
Pending and Previously paid:		0.00

Specific Rate Due:		0.00

Total Specific Rate Due: \$0.00

Specific Rate
 DBE: No, OH Rate: Home Office, Function: Construction Services [Edit](#) Redistribution Total Amount: \$ 0.00 [Add/Edit Redistribution](#)

Incurring This Invoice:	0.00	
Previously Incurred Paid Invoice(s):	300.00	
Previously Incurred Pending Invoice(s):	0.00	

Incurring to Date:	300.00	
Contract Maximum:	25,000.00	
Subject to Maximum:		300.00
Previously Paid:	300.00	
Pending Payment(s):	0.00	
Pending and Previously paid:		300.00

Specific Rate Due:		0.00

Total Specific Rate Due: \$0.00



Entering Redistribution Invoices - continued

Note: Redistribution Total Amount is shown in red when the incurred costs entered and the redistributed costs do not match. The invoice cannot be submitted until the incurred costs and the redistribution total balance.

2. Go back to the *View Invoice* page.
3. Click **Add/Edit Redistribution**. CARS opens the *Redistribution Contract Amounts* page.

On the *Redistribution Contract Amounts* page, CARS shows the sum of all of the labor and costs entered as incurred expenses in the **Total Due This Line Item** field. You cannot directly edit the amount shown in this field because the value is calculated using the incurred costs.

4. Enter the first project ID in the first **Project ID** field.

Note: The **Project ID** field uses positional search to list existing projects in CARS.

5. Enter the amount that is to be redistributed to the project in the **Amount** field. CARS automatically adds the amounts you have entered in the **Cumulative Total** field

Specific Rate

DBE: No, OH Rate: Home Office, Function: Construction Services Edit 3 Redistribution Total Amount: \$ 0.00 Add/Edit Redistribution

Incurred This Invoice:	1,000.00	
Previously Incurred Paid Invoice(s):	300.00	
Previously Incurred Pending Invoice(s):	0.00	
<hr/>		
Incurred to Date:	1,300.00	
Contract Maximum:	25,000.00	
Subject to Maximum:	1,300.00	
Previously Paid:	300.00	
Pending Payment(s):	0.00	
Pending and Previously paid:	300.00	
<hr/>		
Specific Rate Due:	1,000.00	
Total Specific Rate Due:		\$1,000.00

Redistribution Contract Amounts Back to Invoice

New Redistribution Contract Amounts

invoiceLineId : 184217

Total Due This Line Item: 1,000.00

Project ID	Amount
4 1212-12-12	5 200
6544-44-44	100
7897-98-78	100
5555-55-55	100
	0
	0
	0
	0
	0
	0
	0

Cumulative Total: 500

Total Difference: 0

Save Cancel Balance

Existing Redistribution Contract Amounts
Nothing found to display.



Entering Redistribution Invoices - continued

6. Repeat steps 4 and 5 until all of the redistribution costs are entered or until all 10 pairs of fields are completed.
7. Click **Save** to store the redistribution data. CARS clears the **Project ID** and **Amount** fields and lists the entries in the **Existing Redistribution Contract Amounts** table. If you have more than ten projects and amounts to enter, you can save and enter more when the fields are cleared.
8. Click **Balance** to show the difference between the value in the **Total Due This Line Item** field and the **Cumulative Total** field. The balance is the amount of costs that have not been matched in the redistribution entries. The box border is green if the total difference is low or matched. The box border is red if the total difference is too high.
9. Click **Back to Invoice** to review invoice information.

Redistribution Contract Amounts 9 [← Back to Invoice](#)

New Redistribution Contract Amounts

invoiceLineId : 184217

Total Due This Line Item:

Project ID	Amount
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="0"/>

Cumulative Total:

Total Difference:

7 Save
Cancel
8 Balance

Existing Redistribution Contract Amounts

6 items found, displaying all items. 1

Project Id	Amount	Edit	Delete
1212-12-12	200.0		
1234-56-78	50.0		
5555-55-55	100.0		
6544-44-44	100.0		
7987-98-78	100.0		
9789-78-97	150.0		



Entering Redistribution Invoices - continued

Redistribution invoices cannot be submitted until the **Redistribution Total Amount** matches the **Total Due** for the invoice. When the amounts do not balance, the **Redistribution Total Amount** is shown in red.

Either correct the invoice incurred (labor and cost lines) or the redistribution entries.

Editing Redistribution Entries

1. Click **Add/Edit Redistribution** to open the redistribution entries.
2. In the **Existing Redistribution Contract Amounts** table, click **Edit**  on the row you need to change or **Delete**  to remove a record. On **Edit**, CARS opens the **Redistribution Contract** page.
3. Change the values in the **Project ID** or the **Amount** fields.
4. Click **Save**. CARS reopens the **Redistribution Contract Amounts** page with the corrected entries shown.

Specific Rate
DBE: No, OH Rate: Home Office, Function: Construction Services  Redistribution Total Amount: \$ 700.00 

Incurring This Invoice:	1,000.00	
Previously Incurred Paid Invoice(s):	300.00	
Previously Incurred Pending Invoice(s):	0.00	
Incurring to Date:	1,300.00	
Contract Maximum:	25,000.00	
Subject to Maximum:		1,300.00
Previously Paid:	300.00	
Pending Payment(s):	0.00	
Pending and Previously paid:		300.00
Specific Rate Due:		1,000.00

Total Specific Rate Due: \$1,000.00



Existing Redistribution Contract Amounts
6 items found, displaying all items. 1

Project Id	Amount	Edit	Delete
1212-12-12	200.0	 2	
1234-56-78	50.0		
5555-55-55	100.0		
6544-44-44	100.0		
7987-98-78	100.0		
9789-78-97	150.0		

Redistribution Contract

Edit Redistribution Contract
* Indicates required field 184217

Project Id * 3

Amount *

4 Save Cancel



Invoice search now includes “Paid Special” status

The invoice status “Paid Special” has been added to the Invoice Status list on the *Search Invoices* page.

Search Invoices

Invoice Information

Prime Vendor

Sub Vendor

Sub Vendor Type: Subcontract Amendment Subcontract

Project ID

DOT Invoice ID

Consultant Invoice Number

Invoice Status

- Select-
- Submitted
- Reviewed
- Approved
- Approved - Sent to Acct Sys
- Paid
- Paid Special**
- Rejected
- Draft
- Draft for Subcontract
- Submitted to Higher Tier
- Accepted by Higher Tier
- Rejected by Higher Tier
- Included in Higher Tier
- Included in Invoice
- Checked Out for Payment
- Sent Back to Approver
- Approved - Zero or Negative invoice



Changes were made to the View PO Lines per Project page

WisDOT users can view PO information by clicking the PO link on the contract record. The layout of the information is changing to better handle changes needed for handling budgets on a fiscal year basis. These changes are needed to correctly report information to and from PeopleSoft.

The images to the right show the new *View PO Lines per Project* page. This page shows a summary of information for the project. Total cost information includes paid and available amounts for prime and all subconsultants combined.

View PO Lines per Project

Purchase Order #: 0000000	Project ID: 0000-00-00	Contract #: 1400000000	Work Order #:	Status: Active
Vendor: Services, Inc.	Vendor ID: 0000000000	Vendor Location: SUFFIX-		

From Accounting System :

Total Amount: \$000,000.00	Total Applied/Paid Amount:	Total Remaining Balance Amount:
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From CARS :

Approved Total: \$000,000.00	Total Paid to Date: \$000,000.00	Total Remaining Balance Amount: \$00,000.00	
Paid Extenally: \$0.00	Paid in CARS: \$000,000.00	Receipts: (\$0,000.00)	Total: \$000,000.00

One item found. 1

PO Line Number	Budget Reference:	Status:	Remaining Balance:
4	FY2017	Active	



Changes to the View PO Lines per Project page

Specific PO line number information is accessed by clicking the PO Line Number link in the *PO Line Number* table. The PO line information shows amounts for a given PO line. Separate PO lines are used for each fiscal year, amendments or contracts that have multiple project IDs.

View PO Line Information

Purchase Order #: 0000000	Project ID: 0000-00-00	Contract #: 1400000000	Work Order #:	Vendor: Services, Inc.
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Active PO Lines - Active

PO Line#: 1	PO Date: 00/00/2000	Account: 8700128	Class Field: 96100
Dept Id: 1021280000	Program Code:	Requisition #:	Requisition Lien #: 0
Description: M			

From Accounting System :

Total Amount \$00.00	Total Applied/Paid Amount	Total Remaining Balance Amount
--------------------------------	----------------------------------	---------------------------------------



Administrators assign DOT roles from the contract record

Regional administrators and CARS administrators are able to assign roles for DOT users from the contract or work order record. Roles assigned using this new process are also shown on the Security List pages, which have not changed in functionality.

Open the contract or work order.

Click Assign Contract.

CARS opens the Assign Contract to DOT Staff page.

Note: For a work order, the button and page are named as “work order” instead of “contract”.

Select a DOT user name in the field. Users are listed by last name, first name - WAMS ID. Positional search is enabled for this field. Start typing the last name, and CARS shows matching names.

Click Get Existing Roles.

CARS opens the Assign Contract to Dot Staff page.



Administrators assign DOT roles - continued

Check the boxes corresponding to the roles the user needs.

Click Save.

Assign Contract to DOT Staff

[← Back to Contract](#)

Select a DOT Staff Person

Wane, Pat - patwane [Get Existing Roles](#)

Check	Roles#	Actions#
<input type="checkbox"/>	Evaluation Editor	View Contracts, View Evaluations, Manage Evaluations
<input checked="" type="checkbox"/>	Invoice Approver	View Contracts, View Invoices, Manage Invoices, Invoice Approver
<input type="checkbox"/>	Invoice Editor	View Contracts, View Invoices, Manage Invoices
<input type="checkbox"/>	Invoice Reviewer	View Contracts, View Invoices, Invoice Auditor
<input type="checkbox"/>	PM Reviewer	View Contracts, Maintain NOI
<input type="checkbox"/>	NOI Specialist Editor	View Contracts, Manage Solicitation NOI Information
<input type="checkbox"/>	Notify Primary	Email Primary
<input type="checkbox"/>	Notify Secondary	Email Secondary
<input type="checkbox"/>	Selection Approver	View Contracts, Approve NOI Selection
<input checked="" type="checkbox"/>	View Evaluations	View Evaluation
<input checked="" type="checkbox"/>	View Invoices	View Contracts, View Invoices

6 [Save](#) [Cancel](#)



New XML schema

The schema that defines XML structure for CARS has been updated to include new elements that allow redistribution contract invoice data to be entered in an uploaded invoice. The incurred costs and redistribution amounts on the invoice must match exactly in order for the invoice to be submitted.

The images to the right show new code blocks in specific rate and cost per unit invoices. These two cost types are the only ones eligible to use redistribution. The new elements are entered at the end of the invoice details section just before the Line Item end tag.

There is no limit to the number of redistribution details elements allowed in the redistribution data.

The same requirements for data entry as given in [Redistribution invoices are entered directly in CARS](#) apply to XML invoices.

Note: Project IDs are not currently validated in XML. It is possible to enter an invalid project ID. Please review invoices for redistribution contracts with extra care.

Please visit the [CARS page](http://wisconsin.gov/Pages/doing-bus/eng-consultants/cnslt-rsrcs/contracts/cars.aspx) (<http://wisconsin.gov/Pages/doing-bus/eng-consultants/cnslt-rsrcs/contracts/cars.aspx>) for copies of the new schema and other supporting information.

```
83 <directCostSpecificRateTotal>
84   <totalDirectCostInvoiced></totalDirectCostInvoiced>
85   <directCostSpecificRateDetails>
86     <wisdotCostCategory>Company vehicle mileage</wisdotCostCategory>
87     <directCostDescription>a</directCostDescription>
88     <paidToType>Internal Allocation</paidToType>
89     <payeeName></payeeName>
90     <units></units>
91     <unitRate></unitRate>
92     <unitDescription></unitDescription>
93     <directCostCalendarMonth>03</directCostCalendarMonth>
94     <directCostCalendarYear>2016</directCostCalendarYear>
95     <directCostAmount>1700</directCostAmount>
96   </directCostSpecificRateDetails>
97 </directCostSpecificRateTotal>
98
99 <specificRateRedistribution>
100   <srRedistributionDetails>
101     <projectId>10010011</projectId>
102     <redistributionAmount>1000</redistributionAmount>
103   </srRedistributionDetails>
104
105   <srRedistributionDetails>
106     <projectId>10020022</projectId>
107     <redistributionAmount>1500.67</redistributionAmount>
108   </srRedistributionDetails>
109 </specificRateRedistribution>
110 </specificRateLineItem>
```

```
42 <costPerUnitLineItem>
43   <paymentTypeKey>Cost Per Unit</paymentTypeKey>
44   <DBEKey>y</DBEKey>
45   <overheadRateTypeKey>Field Office</overheadRateTypeKey>
46   <functionKey>Miscellaneous</functionKey>
47   <firstInvoiceForProject>N</firstInvoiceForProject>
48   <previousKeyCostPerUnitAmount>1500</previousKeyCostPerUnitAmount>
49   <totalCostPerUnitInvoiced>9000.00</totalCostPerUnitInvoiced>
50
51   <costPerUnitRedistribution>
52     <cpuRedistributionDetails>
53       <projectId>10000011</projectId>
54       <redistributionAmount>1000.90</redistributionAmount>
55     </cpuRedistributionDetails>
56   </costPerUnitRedistribution>
57 </costPerUnitLineItem>
```

