



# New CCIS- Vendor Training

## PEPS Fireside Chat

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Professional Engineering Procurement Services

Procuring the most qualified consultants to deliver effective transportation solutions for Texas.

February 2024



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2 New CCIS in Salesforce

3 Firm Information

4 Employee Information

5 Submitting Precertification Applications

6 Firm Renewal

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# Background & Implementation



## What is CCIS?

- A mainframe vendor management system with a web-based front-end
- This system went into production in 1997
- Contains precertification info for firms and individuals

## Why is PEPS replacing CCIS?

- To improve data access and reporting
- Eliminate difficulties with system maintenance
- To improve ease of use



## How do consultants use CCIS?

- Entering firm information for:
  - Branches
  - Contacts for correspondence
  - Firm equipment & general info
  - HUB/DBE
- Entering employee information for:
  - Licensure, training, certifications
  - Previous project experience
  - Categories of work
- Completing the annual firm renewal



New CCIS is a web –based system accessed through Salesforce



Feb. 1- 6

- Old CCIS will be shut down
- No access



Data from old CCIS will be downloaded into new CCIS the first week of February



Instructions and training are available for users

# New CCIS in Salesforce

# Getting started

Access the  
Salesforce CCIS  
Community site

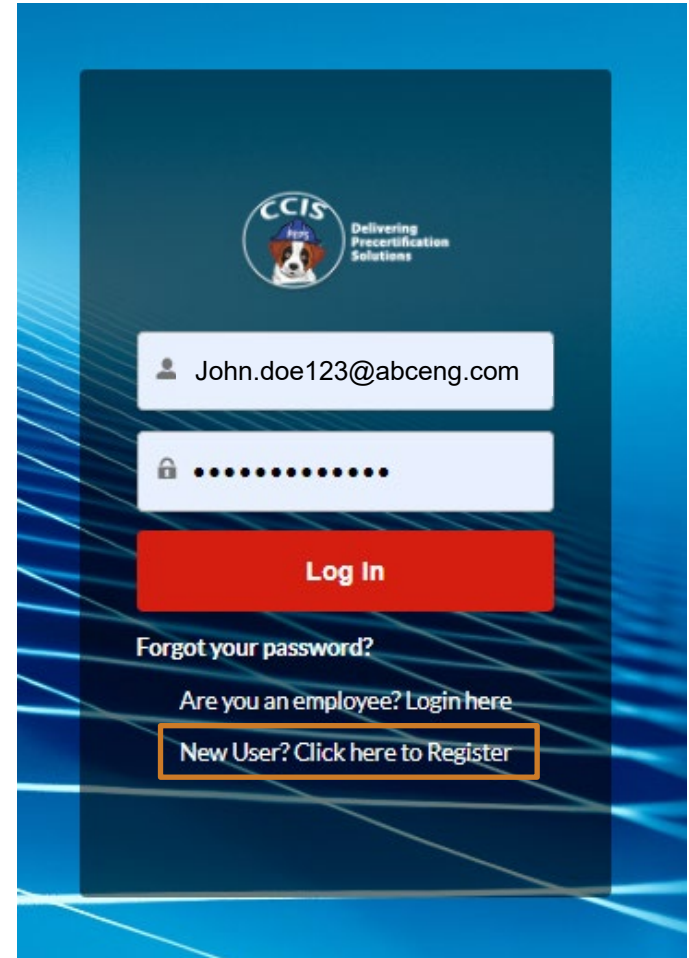
Click on New  
User to self-  
register

TxDOT will  
approve new  
user requests

User will receive  
an email to  
complete  
password setup

Users will be  
“linked” to the  
firm listed on the  
registration form

All vendor users  
have the same  
level of access





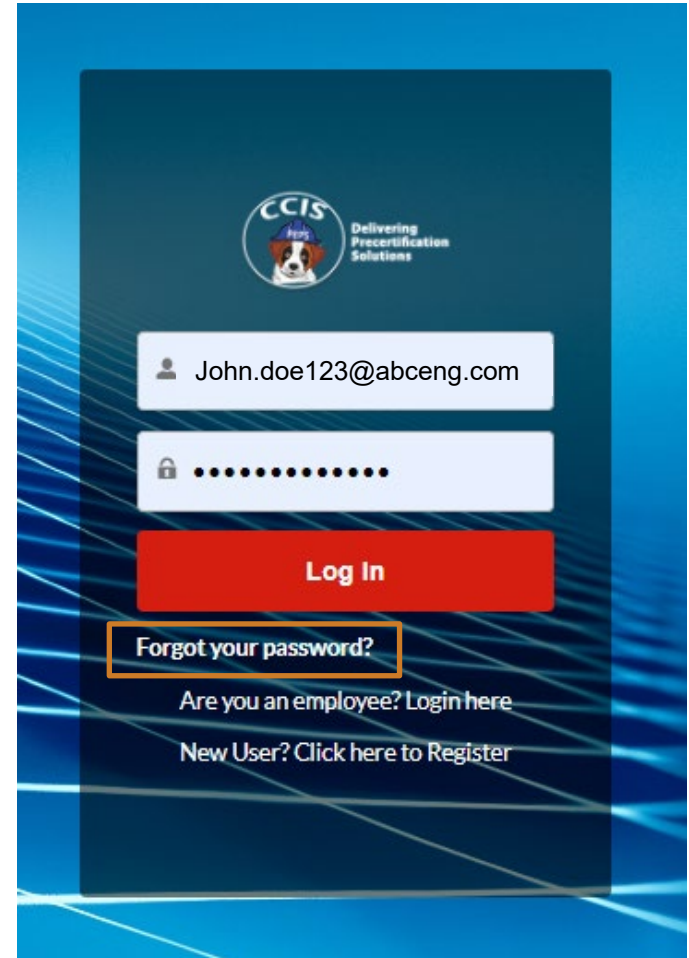
# Password Reset

Password must be reset every 60 days

Reminders will be sent 10 & 5 days prior to expiration

Use the link in the email reminder to reset your password

If you forget your password, use the link on the login page



# Home tab and dashboards

Dashboard  
**CCIS Vendor Contact Home Page Dashboard**  
Dashboard with reports to be shown on Vendor Contact Home Page  
As of Jan 29, 2024, 9:54 AM Viewing as stacy james

Refresh

### CCIS Pending Precertified Employees

Employee: Employee Sequence Num...	Employee: Employee ...	Precertification: Precertification Request N...	Work Category	Approval Status
00036611	Wiley Coyote	00101140	12.1.2 - Portland Cement Conc	Submitted for Rev
00036627	Goofy O'Goofy	00308227	1.1.1 - Policy Planning	Submitted for Rev

### CCIS Precertified Employees

Employee: Employee Sequence Number ↑	Employee: Employee Name	Employee: Status	Work Category
00036608	Mickey Mouse	Employed	4.2.1 - Roadway Design
00036608	Mickey Mouse	Employed	1.1.1 - Policy Planning

### CCIS Vendor PTC Reports

Solicitation Number	Solicitation Salesforce Id	Solicitation Description	Solicitation Start Date	Solicitation End Date
214324235123	Test Solicitation Record	-	10/10/2023, 12:00 PM	10/24/2024, 12:00 PM
0000007777	a1xHv00000MERG	Test data	1/4/2024, 12:00 AM	1/30/2024, 12:00 AM
0000007999	a1xHv00000MGCR	surveying work for amarillo district	1/4/2024 12:00 AM	1/30/2024 12:00 AM

Home tab shows dashboards for:

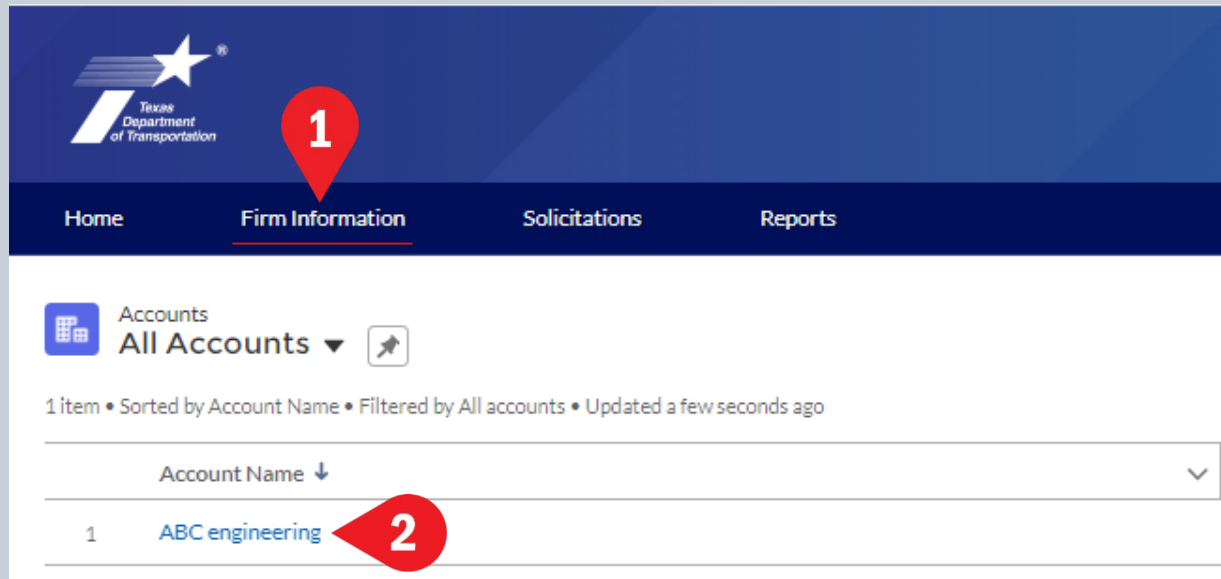
- Pending Precertifications
- Precertified Employees
- PTC Reports

Click on an item to see the details

# Firm Information

## Viewing firm information

1. Click on the Firm Information tab to view the list of accounts
2. Click on the name of the firm to open the firm details screen



The screenshot shows the Texas Department of Transportation website interface. At the top left is the logo for the Texas Department of Transportation, featuring a star and the text "Texas Department of Transportation". Below the logo is a navigation bar with four tabs: "Home", "Firm Information", "Solicitations", and "Reports". The "Firm Information" tab is selected and highlighted with a red underline and a red callout bubble containing the number "1". Below the navigation bar, there is a section titled "Accounts" with a sub-header "All Accounts" and a dropdown arrow. To the right of "All Accounts" is a share icon. Below this, there is a status line: "1 item • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago". Below the status line is a table with one row. The table has a header "Account Name" with a downward arrow. The row contains the number "1" and the text "ABC engineering". A red callout bubble containing the number "2" points to the "ABC engineering" text.

	Account Name ↓
1	ABC engineering

## Viewing firm information and creating a new web user request

1. Notice that the firm's renewal status is displayed at the top of the details screen
2. Click on the dropdown button to see the Create New Web User Request button
3. Click on the New Web User Request Button

The screenshot shows a web interface for a firm's account. At the top left, there is a blue icon of a building and the text "Account ABC engineering". To the right of this are four buttons: "+ Follow", "Edit", "Account Renewal", and "Download Renewal Certificate". A dropdown arrow is visible on the right side of the "Download Renewal Certificate" button. Below these buttons is a red callout bubble with the number "2" pointing to the dropdown arrow. A light blue button labeled "Create New Web User Request" is positioned below the "Download Renewal Certificate" button, with a red callout bubble containing the number "3" pointing to it. A horizontal bar below the buttons contains the text "The Firm's Renewal Status is Active. (426 days remaining)", with a red callout bubble containing the number "1" pointing to it. Below this bar are two tabs: "DETAILS" (which is underlined) and "RELATED". Under the "DETAILS" tab, there are three expandable sections: "Firm DBE/HUB Information", "Firm General Information", and "Personnel Totals".

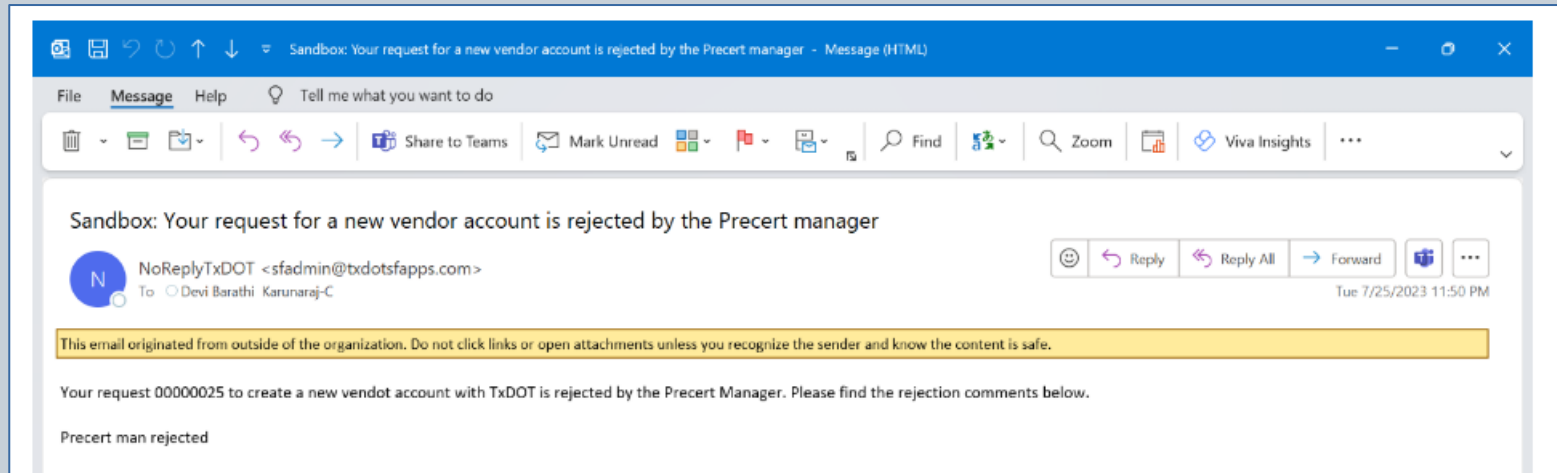
## Creating a new web user request

- An existing user can complete request access for a new user from the firm
  1. Enter first, middle (if applicable), and last name
  2. Enter email for the new user
  3. Choose Type of User
    - precertification user
    - PTC user
    - PTC and Precertification user
  4. Click on the next button to submit the request to PEPS.
- Dialog will appear stating that the request was created successfully

The screenshot shows a web form titled "Create New Web User Request". At the top, it displays "Firm Name: ABC engineering(14755)". Below this is a section for "Contact Information" with several input fields: "Salutation" (a dropdown menu currently showing "--None--"), "First Name", "Middle Name", and "Last Name" (all text input fields). A red bracket labeled "1" encompasses these four fields. Below these is a "Phone" field with an information icon, followed by an "Email" field containing "you@example.com", which is labeled with a red callout "2". The "Type of User" field is a dropdown menu currently showing "--None--", labeled with a red callout "3". At the bottom is a "Comments" text area. A red callout "4" points to a red "Next" button in the bottom right corner.

## Creating a new web user request (continued)

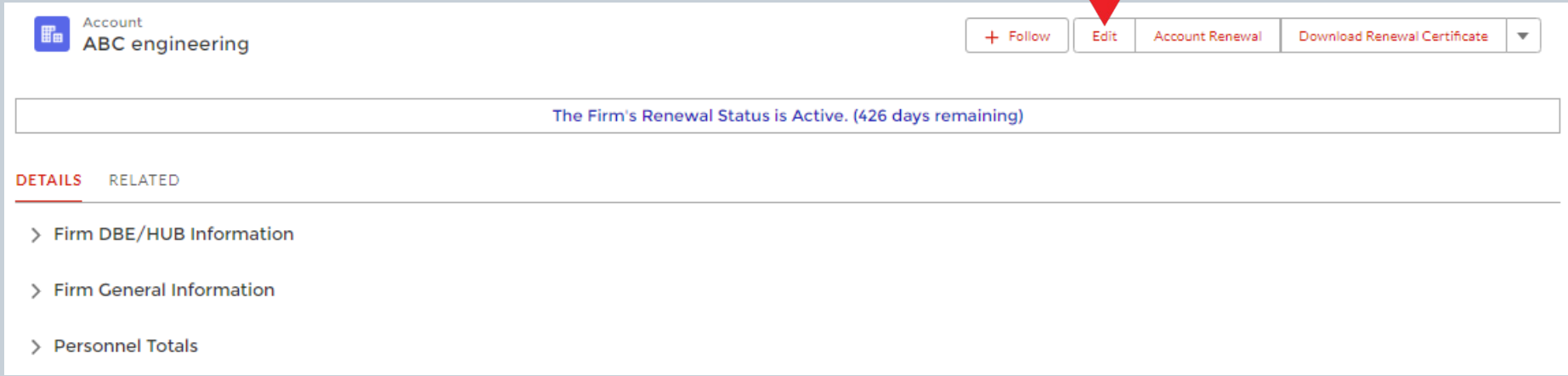
- The PEPS Precent Manager will review the request and either accept or decline the request.
- If accepted, the new user will receive an email with login credentials
- If declined, the user who created the request will receive an email notice stating the reason for denial



## Viewing firm information

1. Click on the Edit button to see the firm details for:

- Firm DBE/HUB information
- Firm general information
- Personnel totals



The screenshot shows a user interface for a firm's account. At the top left, there is a blue icon of a building and the text "Account ABC engineering". To the right of this are four buttons: "+ Follow", "Edit", "Account Renewal", and "Download Renewal Certificate". A red callout bubble with the number "1" is positioned above the "Edit" button. Below the buttons is a white box containing the text "The Firm's Renewal Status is Active. (426 days remaining)". Underneath this box are two tabs: "DETAILS" (which is selected and underlined) and "RELATED". Below the "DETAILS" tab, there are three expandable menu items, each with a right-pointing chevron: "Firm DBE/HUB Information", "Firm General Information", and "Personnel Totals".

Account  
ABC engineering

+ Follow Edit Account Renewal Download Renewal Certificate

The Firm's Renewal Status is Active. (426 days remaining)

DETAILS RELATED

> Firm DBE/HUB Information

> Firm General Information

> Personnel Totals



## Edit ABC engineering

\* = Required Information

### Firm DBE/HUB Information

Not currently a registered DBE.

Not currently a registered HUB.

DBE Certification Number

HUB Certification Number

DBE Expiration Date

HUB Expiration Date

### Firm General Information

\* Account Name

Firm Type Code

Firm Sequence Number

14755

Firm CEO Name

Firm Name Date

Status

Active

Federal Emp Tax ID

2345678901

Comments

Firm Taxpayer Number Texas ⓘ

123456789

*This field is calculated upon save*

Expiration Date

3/31/2024

Renewal Date

11/16/2023

Administratively Qualified Data

No

Administratively Qualified Expiry Date

11/16/2023 10:30 PM

Personnel Totals

Cancel

Save

## DBE/HUB Info section:

- Click the checkbox to indicate that firm is not a HUB or DBE
- Enter DBE certification number and expiration
- Enter HUB certification number and expiration

## Firm General Info section:

- You may view firm name, sequence number, taxpayer number, renewal date, AQ status and date, and firm precertification status
- You may edit the Firm CEO name and add comments if necessary

## Personnel Totals section:

- Edit personnel numbers for total, licensed professionals, tech support staff, and other staff

To save your changes, click the red Save button



Account  
ABC engineering

[+ Follow](#)[Edit](#)[Account Renewal](#)[Download Renewal Certificate](#)

The Firm's Renewal Status is Active. (123 days remaining)

DETAILS

**RELATED**



Contacts (6+)



Employees (Associated Firm) (6+)

[New](#)

Firm Branches (3)

[New](#)

Previous Vendor Names (1)

[New](#)

Equipments (3)

[New](#)

Precertifications (6+)

[New](#)



The Firm's Renewal Status is Active. (61 days remaining)

DETAILS RELATED



Contacts (6+)

Contact Name	First Name	Last Name	Email
<a href="#">beverly bowman</a>	beverly	bowman	bbowman@abceng.com.uat
<a href="#">Stacy W James</a>	Stacy	James	stacyjames952@gmail.com

## Notes about the Contacts list:

- This list shows all users that have access to the system for the firm.
- All these users have the same level of access to the system.
- Firms may have multiple users, but not every employee of the firm needs to have access
- Firms can't delete users, but you can contact PEPS to request that a user be made "inactive"



## Employees (Associated Firm) (6+)

[New](#)

Employee Name	Employee Sequence Number	Status	
ALBERT ALLIGATOR	00036604	Employed	▼
Mickey Mouse	00036608	Employed	▼
Donald Duck	00036609	Employed	▼
Clarabelle Cow	00036610	Employed	▼
Wiley Coyote	00036611	Employed	▼
Scrooge McDuck	00036613	Employed	▼

[View All](#)

## Notes about the Employees list:

- This list shows all employees associated with the firm
- Click the **New** button to add new employees (who haven't been precertified before)
- If a precertified person joins your firm, contact PEPS to request an employee transfer
- Use the dropdown at the right to choose "Edit" to update employee info or mark an employee that needs to be deleted



Firm Branches (3)

New

Branch Number	Mailing Address	Branch Correspondence	
<a href="#">00498314</a>	1011 Loop 11 Austin, WEST VIRGINIA 78758	<input checked="" type="checkbox"/>	▼
<a href="#">00498316</a>	2222 fm 2244 dallas, TEXAS 77882	<input checked="" type="checkbox"/>	▼
<a href="#">00498319</a>	333 thirty-third street tribecca, NEWYORK 33033	<input checked="" type="checkbox"/>	▼

[View All](#)

## Notes about the Firm Branches list:

- This list shows all the firm's branches
- Click on **New** to add a branch
- Click on the dropdown and select **Edit** to update branch information or mark the branches to receive correspondence



Previous Vendor Names (2)

New

Previous Name	Date First Used	Date Last Used	
<a href="#">ABC Engineering, LLC</a>	1/1/2000, 12:00 PM	11/1/2010, 12:00 PM	▼
<a href="#">ABC Consultants, LLC</a>	1/1/1995, 12:00 PM	1/1/2000, 12:00 PM	▼

[View All](#)

## Notes about the Previous Vendor Names list:

- This list shows names of the firm that were used in the past
- Generally, when a firm notifies PEPS of a name change, PEPS will update this section to show the old name and the date of the first and last use.



Equipments (3)

New

Equipment Sequence Number	Equipment Name	Quantity	Comments
<a href="#">00019949</a>	612000 - Engineering Workstations with Open Roads	300	none
<a href="#">00019950</a>	414000 - Boats and Skiffs	2	
<a href="#">00019951</a>	526000 - Mobile LiDAR Scanning Equipment		

[View All](#)

## Notes about the Equipment list:

- This list shows the firm's equipment
- Do not leave this section blank
- Click **New** to add new equipment
- When the equipment dialog opens, use the dropdowns to choose the equipment name and equipment type code.
- Enter the quantity of the equipment
- If necessary, enter a description and comments
- Click **Save**

### New Equipment

\* = Required Information

**Information**

Firm Name

Equipment Sequence Number

\* Equipment Name

[View all dependencies](#)

Equipment Type Code

[View all dependencies](#)

Quantity

Equipment Description

Comments



Precertifications (6+)

New

Precertification Request Number	Approval Status	Employee	Group	
<a href="#">00101168</a>	Draft		5 - Bridge Design	▼
<a href="#">00101169</a>	Draft		10 - Hydraulic Design and Analysis	▼
<a href="#">00101175</a>	Draft	00036627	23 - Engineering Management Services (includes CEC, ...	▼
<a href="#">00101196</a>	Draft	00036604	6 - Bridge Inspection	▼
<a href="#">00101197</a>	Draft	00036604	6 - Bridge Inspection	▼
<a href="#">00101198</a>	Draft		6 - Bridge Inspection	▼

[View All](#)

## Notes about the Precertifications list:

- This list shows all the firm's precertifications that have been submitted
- The list shows approval status: draft; submitted for review; approved; and denied
- Click **New** to add a new precertification record
- Click on the precertification record number to view the details of that precertification
- Click on the dropdown to edit a precertification record



# Employee Information

# Steps to navigate to the employee information screens



Click Firm  
Information  
tab

Click on  
firm name

Click on  
Related tab

Click on the  
name of an  
employee

**DETAILS** RELATED

▼ Firm Information

Associated Firm

[ABC engineering](#)

Firm Sequence Number

14755

▼ Employee General Information

Employee Sequence Number

00036604

Employee Name

[ALBERT ALLIGATOR](#)

First Name

ALBERT

Middle Name

Last Name

ALLIGATOR

Employee Personnel Number

1

Status

Employed


The Employee **Details** tab shows:

- Name
- Sequence number
- Former TxDOT employee/TxDOT termination date

From this screen you can:

- Edit employee info
- Add a project
- Add a precertification object
- Add a certification

DETAILS **RELATED**


 Certifications (6+)

Certification Sequence Number	Degree Type	Training Type
<a href="#">a1qHv000000COF6</a>	BS	engineering
<a href="#">a1qHv000000CPOQ</a>	B.Sc	
<a href="#">a1qHv000000CPOV</a>	B.Sc	
<a href="#">a1qHv000000CPOp</a>		
<a href="#">a1qHv000000CSTy</a>	B.Sc	Inspection
<a href="#">a1qHv000000CSTz</a>	B.Sc	

 Precertifications (3)

Precertification Request Number	Group	Work Category
<a href="#">00101196</a>	6 - Bridge Inspection	6.2.1 - Complex Bridge Inspection Team Leader
<a href="#">00101197</a>	6 - Bridge Inspection	6.2.2 - Complex Bridge Inspection Project Manager
<a href="#">00308236</a>	1 - Transportation Systems Planning	1.2.1 - Systems Planning

[View All](#)

 Projects (1)

Project Name	Work Category	Location	Date Began
<a href="#">1</a>		texas	1/1/2024

The Employee **Related** tab has sections for:

- Certifications
- Precertifications
- Projects


From this screen you can:

- Click on the blue text in each section to see more details about that item
- Add a project
- Add a precertification object
- Add a certification

# Submitting Precertification Applications

# General steps for submitting a precertification application

Add a new employee  
(if not already in the system)



Create a new precertification



Add employee's certifications



Add employee's projects



Submit for approval

## Steps for adding a new employee

- Navigate to Firm Information tab
- Click on firm name
- Click on the Related tab
- In the Employees section, click on New
- When the dialog box appears:
  1. For Status, choose Employed
  2. Enter the First, Middle (if applicable), and Last Names
  3. Employee Personnel Number is a number assigned within your firm (Do not use SSN)
  4. Enter Field of Expertise (Ex. surveying, engineering, etc.)
  5. For former TxDOT employee, enter Y for yes or N for no
  6. Click Save

New Employee

\* = Required Information

Firm Information

\* Associated Firm  
ABC Engineering

Employee General Information

Employee Sequence Number

\* Status  
Employed

\* First Name

Middle Name

\* Last Name

Employee Personnel Number

Employee Branch Number

Employee Field of Expertise

Is Former TxDOT Employee?

TxDOT Employment Termination Date

Information

Delete Employee

Cancel Save & New Save

## Steps for creating a new precertification

- Navigate to Firm Information tab
- Click on firm name
- Click on the Related tab
- In the Precertifications section, click on New
- When the dialog box appears:
  1. Click in Employee field to choose an employee
  2. Click in the Group field to choose the work group
  3. Click in the Work Category field to choose the work category
  4. Click Save

**New Precertification**

\* = Required Information

**Information**

Precertification Request Number

Employee Category Status

\* Employee

Search Employees...

\* Firm Name

ABC engineering

Approval Status

Draft

Due Date

Approval/Denial Date by Review Officer

Date approved/denied by Precert Manager

Precertification Status

\* Group

--None--

[View all dependencies](#)

Work Category

--None--

[View all dependencies](#)

Employee Work Category Years Experience

Employee Work Category Begin Date

Employee Work Category End Date

Approval/Denial Comments

Comments

Precertification Denial Comments

Cancel

**1** **2** **3** **4**



## Steps for adding certifications

- Refer to the Guidance for Entering Personal Certifications to determine which fields need to be completed
- Navigate to the Employee Related tab
- Click on the dropdown in the upper right corner and select Add Certification
- When the dialog box appears:
  1. Complete the required fields for the type of certification that being entered:
    - Licensure
    - Degree
    - Required training for categ. 3.7.1 & 4.7.1
    - Required training for categ. 6.1.1, 6.1.2, 6.2.1, 6.2.2, 6.3.1, & 6.3.2
  2. Click Next

The screenshot shows the 'Add Certification' dialog box. At the top, there are buttons for 'Edit', 'Add Project', and 'Add Precertification'. Below these is a red-bordered button labeled 'Add Certification'. The main form area is titled 'Add Certification' and contains the following fields:

- Employee: 00036611
- Work Category: --None--
- Degree Type: [Empty text field]
- Training Type: [Empty text field]
- Certification Training Date: [Date picker]
- Personnel/Laboratory Certification Type: --None--
- Issue Date: [Date picker]
- Expiration Date: [Date picker]
- Employee Certification Number: [Empty text field]
- Issuing Agency Name: [Empty text field]
- Completion Date: [Date picker]

A red circle with the number '1' points to the 'Work Category' dropdown menu. A red circle with the number '2' points to the 'Next' button at the bottom right.

## Steps for adding certifications (continued)

- A dialog box for uploading a certificate will appear
- Training certificates are only required for work categories: 3.7.1, 4.7.1, 6.1.1, 6.1.2, 6.2.1, 6.2.2, 6.3.1, and 6.3.2
- Each required certificate must be uploaded separately and be in PDF format
- If training certificates are not required, click Next

Add Certification

Upload Certificate

Upload Files Or drop files

Next

## Steps for adding certifications (continued)

- If training certificates are required:
  1. Click Upload Files and then select the file you want to upload
  2. Alternately, you may drag and drop a file into the designated area
  3. When upload is complete, click Done
  4. Click Finish
- The certifications should appear on the Employee Related tab in the Certifications list.
- Click on the Certification Sequence Number to view the details entered for that certification
- Click on the Certification Related tab to see a list of the uploaded files for that certification


### Add Certification

Upload Certificate

 Upload Files Or drop files

1 2 3

Next

 Certification  
a1qHv000000Cp1t


DETAILS RELATED


Employee Sequence Number  
00036611

Employee  
[00036611](#)

Firm Sequence Number  
14755

Firm Name  
[ABC engineering](#)

Certification Type Code 

Certification Sequence Number  
a1qHv000000Cp1t 

Employee Name  
Wiley Coyote

Associated Work Category  
3.7.1 - Traffic Operational Analysis

## Steps for adding projects

- Navigate to the Employee Related tab
- Click on Add Project in the upper right corner
- When the Add Project dialog box appears, enter the following:
  1. Project name
  2. Project begin & end dates
  3. Project location
  4. General description of the project
  5. Estimated project fees
  6. Estimated construction cost
  7. Click Next

### Add Project

\* Project Name

Complete this field.

Employee Name

\* Project Begin Date

\* Project End Date

\* Project Location

Project General Description

Estimated Project Fees

Estimated Construction Cost

## Steps for adding projects (continued)

- When the category dialog box appears, enter the following:
  1. Use the dropdown to select a work group
  2. Use the dropdown to select a work category
  3. Enter a description of work performed by the employee as it relates to the work category
  4. Click Add More Work Categories if other categories are needed
  5. Click Next. Then click Finish.

The screenshot shows the 'Add Project' dialog box with the following fields and callouts:

- 1**: Callout pointing to the 'Enter a Category' dropdown menu, which currently shows '4 - Roadway Design'.
- 2**: Callout pointing to the 'Enter a Work Category' dropdown menu, which currently shows '-- none selected --'.
- 3**: Callout pointing to the 'Description of Work Category' text input field.
- 4**: Callout pointing to the 'Add More Work Categories' checkbox, which is currently unchecked.
- 5**: Callout pointing to the 'Next' button.

At the bottom of the dialog box, there are two buttons: 'Previous' and 'Next'.

### Tips for the Description of Work field:

- Refer to the list of work category descriptions and qualification requirements.
- Make sure to address all the specific qualification requirements.
- Use phrases like, “I designed”, “I analyzed”, etc.
- Give enough detail to demonstrate knowledge and competence (ex. “I computed the runoff using the Rational Method and considering the following factors” ...)

## Steps for submitting the precertification for review

- Navigate to the Firm Related tab
  1. On the Precertifications list, click on the precertification you want to submit
  2. When the Precertification Details appear, click on Submit for Approval in the upper right corner
  3. When the dialog box appears, click Submit. (It is not necessary to enter any comments.)
- A green box should appear at the top of the screen to confirm that the precertification was submitted
- On the Precertifications list, this precertification should now show status of “Submitted for Review”


Precertifications (6+)		
Precertification Request Number	Approval Status	Employee
<a href="#">00101168</a>	Draft	
<a href="#">00101169</a>	Draft	
<a href="#">00101175</a>	Draft	00036627

Submit for Approval

Comments

## After the precertification has been submitted for review, you can:

- View the precertification status on the dashboard
- Navigate to the Precertification list to see the status of all firm precertifications (ex. draft, submitted for review, approved, or denied)
- Click on a specific item on the precertification list to view more detailed status, including:
  1. Approval status
  2. Approval/denial date by review officer and date
  3. Approval/denial date by precert manager
  4. Precertification denial comments
- Automated approval/denial emails will also be sent to the firm's user

 Precertification  
00101175

**DETAILS** RELATED

---

Precertification Request Number  
00101175

---

Employee  
[00036627](#)

---

Firm Name  
[ABC engineering](#)

---

Approval Status  
Submitted for Review **1**

---

Due Date

---

Approval/Denial Date by Review Officer **2**

---

Date approved/denied by Precert Manager **3**

---

Precertification Status

---

Group  
23 - Engineering Management Services (includes CEC, GEC, IE, PcE, PMC, and services related to the alternative delivery program)

---

Work Category  
23.1.1 - Alternative Delivery Procurement Manager

---

Comments

---

Precertification Deny Comments **4**

# Firm Renewal





# Firm Renewal



Required to maintain active precertification status



Complete every year by March 31st



Automatic reminders will be sent by CCIS

# General Steps for Firm Renewal

Click on Account Renewal button

Review firm branch information

Review employee information

Review firm general information

Review DBE/HUB information

## Steps for Account Renewal

- Click on Firm Information tab
- Click on firm name to open the firm details
  1. Click on the Account Renewal button
  2. Use the dropdown to select Firm Branch Information
  3. Click on Next



### Account Renewal

Select the Firm Information to Review

--None--

Please select the Firm information to review from among the below sections.

- Review Completed - Firm Branch Information ⓘ
  - **Firm Branch Information:** Please review the current branch addresses, contacts and telephone, fax and e-mail information and make sure it is up to date.
- Review Completed - Firm Employee Information ⓘ
  - **Firm Employee Information:** Please review employees listed are currently employed by your firm.
- Review Completed - Firm General Information ⓘ
  - **Firm General Information:** Please review your General Information and enter your Texas Taxpayer Number in the space provided.
- Review Completed - Firm DBE/HUB Information ⓘ
  - **Firm DBE/HUB Information:** Please review and confirm Status/Dates of DBE/HUB information

3 Next

## Account Renewal

00498314

### Information

Firm Name

ABC engineering

Corporate Office (Main Branch)



Branch Correspondence



### Street Address

Street Address

1011 Loop 11

City

Austin

State

WEST VIRGINIA

Zip Code ⓘ

78758

Phone Number ⓘ

512-111-2223

Fax Number

5123334444

### Mailing Information

1

Save

## Steps for Account Renewal (continued)

- When the dialog box for firm branch information opens, review the information and update if needed.
  - Click on Save at the bottom of the dialog box to move to the next branch.
  - After reviewing all the branches, click on Next to navigate back to the Account Renewal selection screen.

## Account Renewal

Please click Next to navigate back to the review selection screen

2

Next

## Steps for Account Renewal (continued)

- The Account Renewal dialog box will appear.
  1. Use the dropdown to select Firm Employee Information
  2. Click on Next
- When the dialog box for firm employee information opens, review the information and update if needed.
- Click on Save at the bottom of the dialog box to move to the next employee
- After reviewing all the employees, click on Next to navigate back to the Account Renewal selection screen.

### Account Renewal

Select the Firm Information to Review

--None--

Please select the Firm information to review from among the below sections.

Review Completed - Firm Branch Information ⓘ

- **Firm Branch Information:** Please review the current branch addresses, contacts and telephone, fax and e-mail information and make sure it is up to date.

Review Completed - Firm Employee Information ⓘ

- **Firm Employee Information:** Please review employees listed are currently employed by your firm.

Review Completed - Firm General Information ⓘ

- **Firm General Information:** Please review your General Information and enter your Texas Taxpayer Number in the space provided.

Review Completed - Firm DBE/HUB Information ⓘ

- **Firm DBE/HUB Information:** Please review and confirm Status/Dates of DBE/HUB information

2 **Next**

## Steps for Account Renewal (continued)

- The Account Renewal dialog box will appear.
  1. Use the dropdown to select Firm General Information
  2. Click on Next
- When the dialog box for firm general information opens, review the information and update if needed.
- Click on Save at the bottom of the dialog box
- Click on Next to navigate back to the Account Renewal selection screen.

Account Renewal

Select the Firm Information to Review

--None--

Please select the Firm information to review from among the below sections.

- Review Completed - Firm Branch Information ⓘ
  - **Firm Branch Information:** Please review the current branch addresses, contacts and telephone, fax and e-mail information and make sure it is up to date.
- Review Completed - Firm Employee Information ⓘ
  - **Firm Employee Information:** Please review employees listed are currently employed by your firm.
- Review Completed - Firm General Information ⓘ
  - **Firm General Information:** Please review your General Information and enter your Texas Taxpayer Number in the space provided.
- Review Completed - Firm DBE/HUB Information ⓘ
  - **Firm DBE/HUB Information:** Please review and confirm Status/Dates of DBE/HUB information

2 Next

## Steps for Account Renewal (continued)

- The Account Renewal dialog box will appear.
  1. Use the dropdown to select Firm DBE/HUB Information
  2. Click on Next
- When the dialog box for firm DBE/HUB information opens, review the information and update if needed.
- Click on Save at the bottom of the dialog box
- Click on Next to navigate back to the Account Renewal selection screen.



### Account Renewal

Select the Firm Information to Review

--None--

Please select the Firm information to review from among the below sections.

- Review Completed - Firm Branch Information ⓘ
  - **Firm Branch Information:** Please review the current branch addresses, contacts and telephone, fax and e-mail information and make sure it is up to date.
- Review Completed - Firm Employee Information ⓘ
  - **Firm Employee Information:** Please review employees listed are currently employed by your firm.
- Review Completed - Firm General Information ⓘ
  - **Firm General Information:** Please review your General Information and enter your Texas Taxpayer Number in the space provided.
- Review Completed - Firm DBE/HUB Information ⓘ
  - **Firm DBE/HUB Information:** Please review and confirm Status/Dates of DBE/HUB information

2 **Next**

## Account Renewal

Select the Firm Information to Review

Please select the Firm information to review from among the below sections.

- Review Completed - Firm Branch Information ⓘ
  - **Firm Branch Information:** Please review the current branch addresses, contacts and telephone, fax and e-mail information and make sure it is up to date.
- Review Completed - Firm Employee Information ⓘ
  - **Firm Employee Information:** Please review employees listed are currently employed by your firm.
- Review Completed - Firm General Information ⓘ
  - **Firm General Information:** Please review your General Information and enter your Texas Taxpayer Number in the space provided.
- Review Completed - Firm DBE/HUB Information ⓘ
  - **Firm DBE/HUB Information:** Please review and confirm Status/Dates of DBE/HUB information

1

Next

## Steps for Account Renewal (continued)

- The Account Renewal dialog box will appear.
- All four boxes should now be checked.
  1. Click on Next
  2. When the dialog box opens, the message will show that your firm renewal has been completed. Click on Finish.

## Account Renewal

Your Firm Renewal has been completed. You can generate and download the PDF file using the [Download Renewal Certificate](#) button on Account page


2

Finish



## Account renewal completion and certificate

1. Once the renewal process has been completed, you will see that the firm's renewal status shown on the Firm Details screen has changed to reflect the days until March 31<sup>st</sup> of next year
2. Click Download Renewal Certificate to see a copy of the renewal certificate.

 Account  
ABC engineering

[+ Follow](#)

[Edit](#)

[Account Renewal](#)

[Download Renewal Certificate](#) ▼

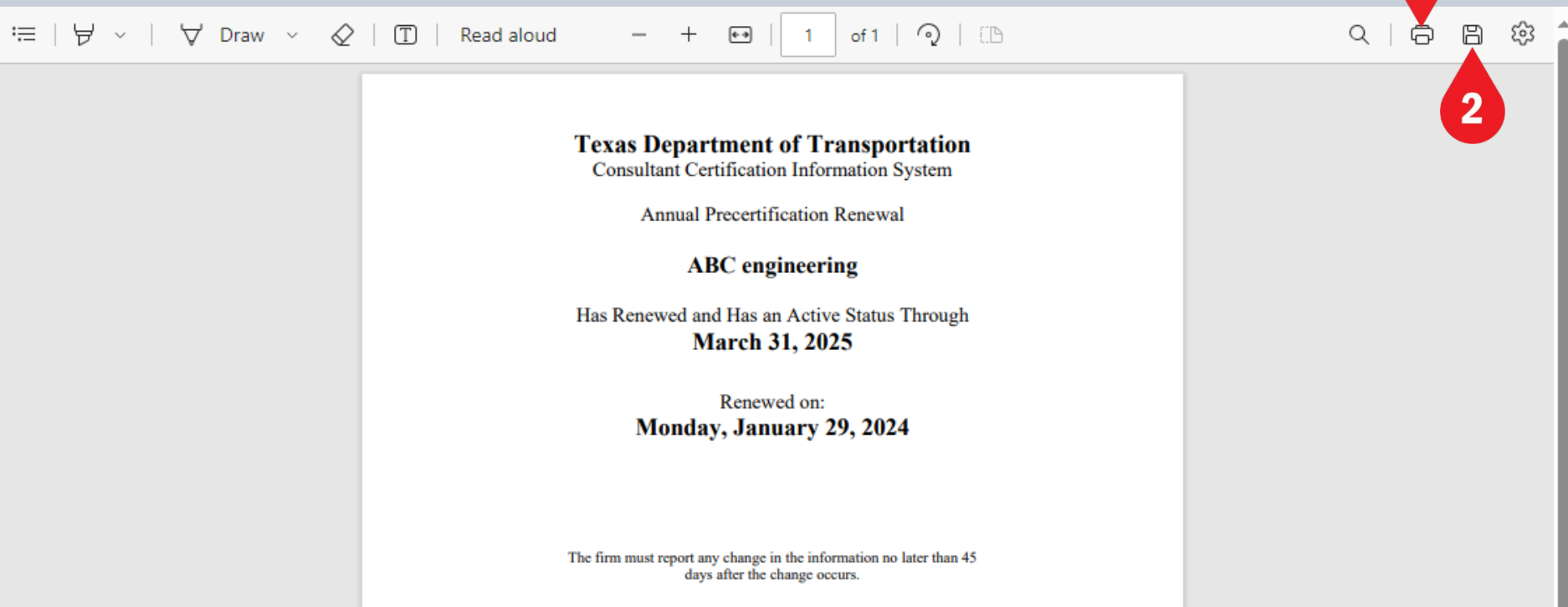
1

The Firm's Renewal Status is Active. (426 days remaining)

2

## Account renewal completion and certificate (continued)

1. Click the printer icon to print the certificate
2. Click the diskette icon to save a copy of the certificate to the desired location



# Completing the PTC Form



## Old PTC Form

- Excel File Format
- Categories manually entered by procurement engineer
- Static data at time of posting
- Some data validation

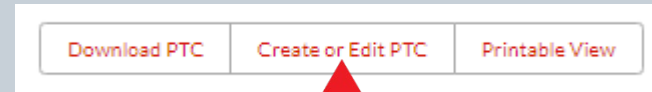
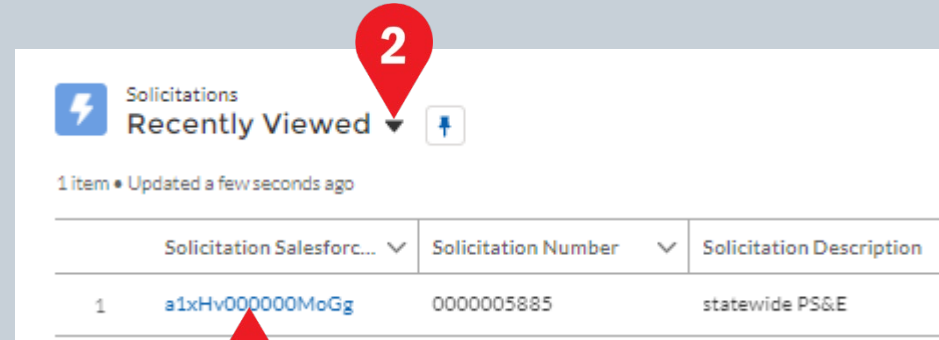
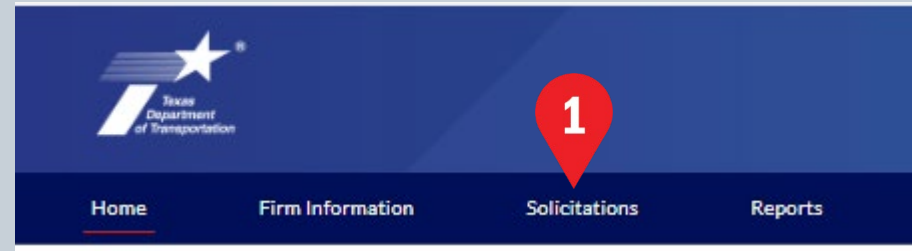


## New PTC Form

- Online Form in CCIS
- Categories automatically pulled from PS-CAMS
- Data is live up to closing
- Enhanced data validation

## Steps for completing the PTC form

- PTC forms will be available in CCIS between the solicitation posting and closing dates
- To access the PTC form for a solicitation:
  1. Click on the Solicitations tab
  2. The list of Recently Viewed solicitations will appear. Use the dropdown to change this to All.
  3. Click on the blue solicitation ID to select a solicitation
  4. When the solicitation details screen appears, click on Create or Edit PTC in the upper right corner



## Steps for completing the PTC form (continued)

- When the PTC form opens, the PTC Form Instructions dialog will appear. Read the instructions and then click OK at the bottom of the dialog.
  - You may return to the instructions at any time by clicking the PTC Instructions button located near the upper right corner of the form.
  - Choose Yes or No to show the prime firm's DBE status

**PTC Form Instructions**

The Project Team Composition (PTC) form consists of 2 parts and must be completed and returned as an attachment to your firm's solicitation response in Bonfire. TxDOT staff will use the PTC form to determine your firm's PTC and Active Renewal status. To complete the PTC form please:

1. Verify that the solicitation number for the PTC form matches the solicitation number in Bonfire.
2. Complete all the required information on the PTC form and perform a thorough review.
3. Save and submit the completed PTC form.
4. Print the completed PTC form to PDF format.
5. Upload the PTC form (in PDF format) to the Bonfire system for the corresponding solicitation.

*The PTC Form is available to the submitting firm starting on the Solicitation Post Date and remains available for editing and submission through the Solicitation Close Date. During this time, the PTC Form is no longer available for editing or re-submission after the Solicitation Close Date.*

**1**

[PTC Instructions](#) [Save Changes](#)

**2**

**TxDOT Assigned DBE Goal: 15**

**Is your firm (Prime Provider) a Certified DBE?**

Yes  
 No

Prime Provider			
Firm Seq No.	Acronym/ Abbreviation*	Legal Firm Name**	
<input type="text"/>	<input type="text"/>	<input type="text"/>	



# Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  - The Administratively Qualified (AQ) column will be populated using the AQ data that resides in the PS-CAMS system. If the firm is AQ, Yes will be shown. If the firm is not AQ, then you must use the dropdown to select the appropriate response.
  - Enter the percentage of work to be done by the prime provider. (must be >30%)
  - For subproviders, enter the percentage in the appropriate Non-HUB/DBE or HUB/DBE column
  - Click Save Changes to save the data that has been entered.

Is your firm (Prime Provider) a Certified DBE?

Yes  
 No

[PTC Instructions](#) [Save Changes](#)

Prime Provider				Administratively Qualified?	% of work that prime provider and sub providers are responsible for			TxDOT Use Only		
Firm Seq No.	Acronym/ Abbreviation*	Legal Firm Name**	Vendor ID Number	Yes/No	Prime	Non-DBE	DBE***	Total	DBETUCP Directory(Y/N)	DBE NAICS Code
<input type="text" value="14755"/>	<input type="text" value="ABC"/>	<input type="text" value="ABC engineering"/>	<input type="text" value="123456789"/>	<div style="border: 1px solid red; padding: 2px;">* Select AQ Value Select Complete this field.</div>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Subproviders										
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



# Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  - For each work category, use the dropdown to select the firm for that category.
  - The number of precertified employees at the selected firm will appear. If this number is zero, there are no precertified people at that firm, so you will need to select a different firm.
  - Use the dropdown to select the task leader for the category. If the dropdown doesn't appear, then there are no precertified people at the selected firm. You will need to select a different firm. (Note: leaving the task leader column blank could result in the prime firm being considered non-responsive.)

PTC Instructions    Back To Part 1    Save Changes

Work Category No.	Category Name	*E&D Related Services	Percentage Advertised	Firm Name	Number of Precertified Employees	Task Leader	% Total	ABC	JAC	XYZ
1.1.1	Policy Planning	N	5.00%	Select Firm			%			
4.2.1	Roadway Design	Y	25.00%	Select Firm			%			
5.2.1	Bridge Design	Y	15.00%	Select Firm			%			

# Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  - For each work non-listed category (NLC), use the dropdown to select the firm responsible for providing the NLC task leader. This firm must correspond to the information shown on the NLC qualifications template. (Note: leaving the firm name column blank could result in the prime firm being considered non-responsive.)
  - Type in the name of the NLC task leader. This must correspond to the information shown on the NLC qualifications template. (Note: leaving the task leader column blank could result in the prime firm being considered non-responsive.)

**Non Listed Categories**  
 For a non listed category, list the name of the person identified in the proposal for the purpose of satisfying the non-listed category requirements.

Work Category No.	Category Name	E & D Related Services	Percentage Advertised	Firm Name <b>1</b>	Task Leader** <b>2</b>				
NLC - 1	Hydrology & Hydraulics (H&H) GIS Analysis	N	5%	Select Firm		%			
NLC - 2	Roundabout Design	Y	5%	Select Firm		%			
<b>Total</b>			100.00%			0%	%	%	%
<b>% of work that prime provider and subproviders are responsible for</b>							50%	20%	30%

# Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  - Note that for each category and NLC, the form shows whether the category is an E&D service (Y), not an E&D service (N), or an exempt service (E).
  - The form also shows the percentage advertised for each category and NLC.
  - The percent total on each row must match the percentage advertised. If not, this cell turns red.
  - Each column represents one of the firms listed on part 1 of the PTC form. In these columns, you can hover over the grey circle below the acronym to see the full name of the firm. Enter percentages for each firm that will be performing work on the category.

Work Category No.	Category Name	E&D Related Services	Percentage Advertised	Firm Name	Number of Precertified Employees	Task Leader	% Total	ABC	JAC	XYZ
1.1.1	Policy Planning	N	5.00%	14755 - ABC engineering	2	00036608 - Mickey Mouse	%			
4.2.1	Roadway Design	Y	25.00%	14755 - ABC engineering	4	00036608 - Mickey Mouse	%			
5.2.1	Bridge Design	Y	15.00%	14757 - Jackal & Associates, Inc.	0		%			

# Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  - If the % Total doesn't equal the Percent advertised, the cell will turn red.
  - As you fill in percentages, if a non-AQ firm is assigned to an E&D category, the field will be highlighted with red.
  - In addition, a dialog box will appear and you must enter an explanation for why a non-AQ firm is assigned to an E&D category.
  - Click Save to save your AQ explanation.

Number of Precertified Employees	Task Leader	% Total	ABC	JAC	XYZ
2	00036608 - Mickey	4%	4		
4	00036608 - Mickey Mouse	25%	15		5
0		15%	5	10	
2	00036613 - Scrooge McDuck	10%	10		
4	00036611 - Wiley Coyote	10%	6		4
1	00036627 - Goofy O'Goofy	5%	5		
1	00036608 - Mickey Mouse	10%			10
3	00036627 - Goofy O'Goofy	10%			10
Task Leader**					
	Daphne Blake	5%		5	
	Velma Dinkley	5%	5		
		99.00%	50%	20%	29%
			50%	20%	30%

Please provide the AQ Explanation

Reason:

**Save**

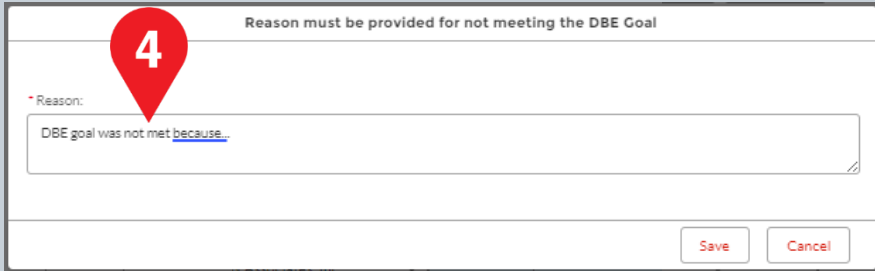
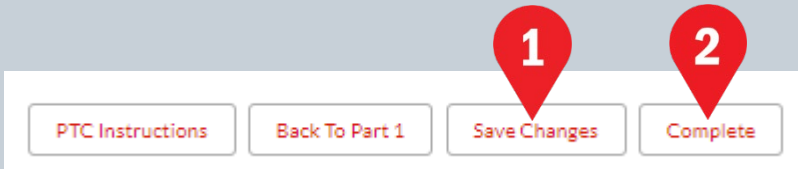
## Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  - Across the bottom of the table, there is a grey row that shows the % of work that the prime provider and subproviders are responsible for. This is the percentage that was entered on part 1 of the form.
  - In the blue row at the bottom of the table, the total for each column is shown. The user must verify that the column total in the blue row matches the percentage shown in the grey row.

Non Listed Categories										
For a non listed category, list the name of the person identified in the proposal for the purpose of satisfying the non-listed category requirements.										
Work Category No.	Category Name	E & D Related Services	Percentage Advertised	Firm Name	Task Leader**					
NLC - 1	Hydrology & Hydraulics (H&H) GIS Analysis	N	5%	14757 - Jackal & Associates, Inc.	Daphne Blake	5%	5			
NLC - 2	Roundabout Design	Y	5%	14755 - ABC engineering	Velma Dinkley	5%	5			
Total			100.00%			99.00%	50%	20%	29%	
1 % of work that prime provider and subproviders are responsible for							50%	20%	30%	

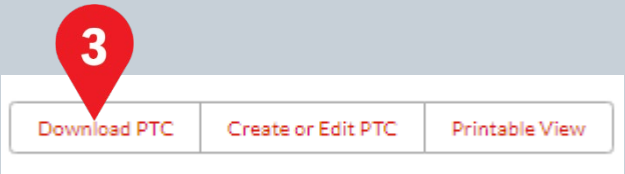
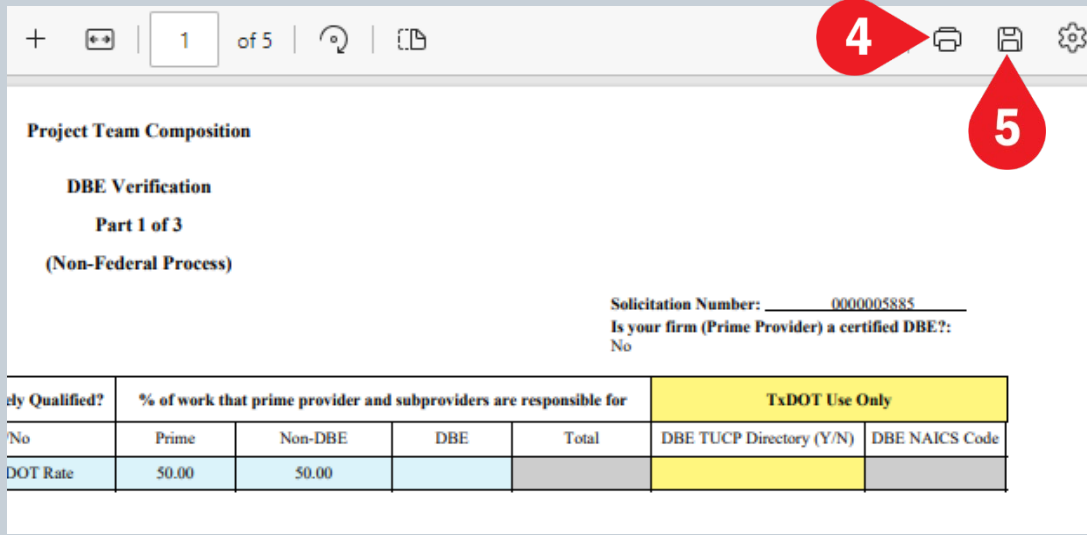
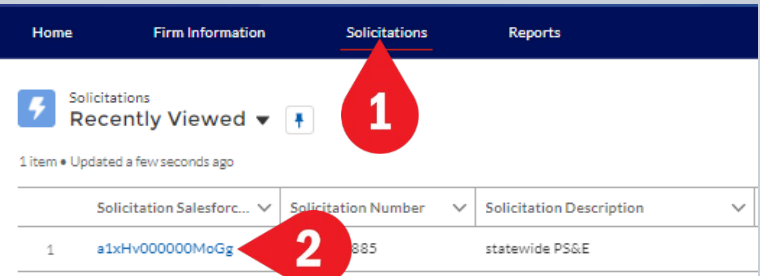
# Steps for completing the PTC form (continued)

- Continue filling out the PTC form as follows:
  1. At any time, you may click the Save Changes button to save your PTC form.
  2. When the PTC form is complete, click the Complete button at the top of the form.
  3. The form will validate the data and show a red error message if there is a problem. In this example, the total percentage did not equal 100%. Correct the error, save the changes, and hit the Complete button again.
  4. If the assigned DBE or HUB goal is not being met, a dialog box will appear. Enter an explanation in the reason field and click on the Save button.



# Steps for downloading the PTC form

1. Click on the Solicitations tab
2. Select the completed PTC form.
3. When the solicitation details screen opens, click on the Download PTC button.
4. The PTC form will be displayed on the screen. If desired, click on the printer icon to print the form.
5. Click on the diskette icon to save the PDF copy of the form.



**Note:** the PDF of the PTC form must be uploaded into Bonfire with the rest of the proposal package

# Resources





## TxDOT Become Precertified page

- <https://www.txdot.gov/business/peps/become-precertified.html>

## TxDOT Program Improvement and Initiatives page

- <https://www.txdot.gov/business/peps/program-improvements-initiatives.html>

## For general questions about precertification

- Send email to [PEPS\\_COE\\_Process@txdot.gov](mailto:PEPS_COE_Process@txdot.gov)

## For questions about new CCIS

- Send email to [PEPS\\_CCIS\\_Precert@txdot.gov](mailto:PEPS_CCIS_Precert@txdot.gov)

A person wearing a dark blue suit jacket and a white shirt is holding a white rectangular sign with both hands. The sign has the word "QUESTIONS?" written on it in a bold, dark blue, sans-serif font. The background is a plain, light grey color.

**QUESTIONS?**



# Sierra Selinas

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