Contractor Evaluations

Recordkeeper Job Aid Construction Division



Texas Department of Transportation

Overview

The evaluation process provides information and feedback from the Area Engineer to the Construction Division (CST) on the performance of contractors. This is also used as communication tool between the Contractor and the Engineer to discuss any issues raised throughout the project.

Resources

- Construction Contract Administration Manual (CCAM), Chapter 5, Section 4, "Evaluations"
- Special Provision 000, "Important Notice to Contractors" (Notice of Contractor Performance Evaluations)
- <u>Prime Contractor Performance Evaluations Manual</u> (https://iapps/apps/OnlineManuals/Default.aspx)

Applications Used

- SiteManager
- eForms application (internal) Crossroads page
- Construction support (internal) Crossroads page Construction Division Forms
- SiteManager reports (internal) Crossroads page, "APVM" RO (read only) Authorized Prime Vendors Inquiry Report providing the name of the Authorized Signers
- ProjectWise

Forms

- Form 2707 Contractor Evaluation Form
- Form 2707R Form 2707 Review Checklist

Reports

- APVM Authorized Signers (SiteManager report)
- Most recent project estimate

Goal of this Document

The goal of this document is to provide instructions regarding the Interim, Performance, and Final contractor evaluations.

Contractor Evaluations

Recordkeepers may be asked to prepare the Form 2707 for the Area Engineer, however the Engineer will be the one to enter the values and justification portion of the form. After completion of the 2707, the recordkeeper may be required to complete Form 2707R. Refer to your District and/or Office SOP for additional guidance.

Types of Evaluations

Interim Evaluations

- **Annual** Interim evaluations are required to be performed annually. The first evaluation is due one year after the date the work authorization is signed.
- **Performance Evaluations** Performance evaluations are performed when there are performance issues to trigger a Project Recovery Plan.

Final Evaluations

• **Final Evaluations** are due prior to the final estimate generation. These are an overall evaluation of the performance of the contractor for the entirety of the project.



Contractor Evaluations

Authorized signers are the only ones allowed to sign evaluations on behalf of the contractor. An existing authorized signer for the contractor can delegate signature authority to another individual by letter or email that includes the person's name and specific project. Refer to the *Prime Contractor Performance Evaluations Manual*, Chapter 2, Section 6 of for additional information.

Use the following steps to identify the Contractor Vendor ID in SiteManager.

L-3DK25X3 20240928	1. Log into the SiteManager application.
1.12-e TXX01 1.007 AUTOVINE Project SiteManagor Autovine Project SiteManagor Autovine Passeword SiteManagor Autovine Passeword SiteManagor Autovine Passeword SiteManagor Autovine Autovine SiteManagor Autovine Autovine SiteManagor Autovine SiteManagor Autovine Autovine	A. Enter TxDOT User ID.B. Enter Password.C. Click Logon.Choose your role.
SiteManager Panel X Man Panel Daily Work Reports(+) Daily Work Daily Work Contract Daily Work PiceIne(+) Contractor Charge Materials Administration(+) Management(+) System Manuals(+)	 From the SiteManager main panel, double click on Contract Administration.



Main Panel Contract Administration(+) Contract Records(+) Main Panel Image: Contract Administration(+) Contract Records(+) Reference, Tables(C4+) Contractor Reports (CA+) Process List Management(+) Management(+) Process List	3. From the Contract Administration tab, double click on Contract Records.
Image Panel Contract Administration(+) Contract Records(+) Image Panel Contract Administration(+) Contract Records(+) Image Panel Image Panel Contract Administration(+) Contract Records(+) Image Panel Image Panel Image Panel Contract Administration(+) Contract Records(+) Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Panel Image Pa	 From the Contract Records tab, choose Contracts to access the list of contracts available in the system and the associated vendor ID.
Selection ×	5. The Select Contract menu will allow a search by CSJ (Contract ID). Click in the contract ID area.
Contract ID Description Vendor ID Fed State Pop Ntr County L/L Z Lv13 Lv14 Location Description.1 00010020 IPERMONIE GF AUGULFREEWAY 12754 STE 200255767 PDAR 0072 24 952 NEW MEX000 STATE LINE SMUR 00010054 REMADULTATION 0620 NH 2013048 OME 0072 24 952 NEW MEX000 STATE LINE SMUR 00010054 REMADULTATION 06203 NH 2013048 OME 0072 24 952 NEW MEX000 STATE LINE 00010058 STRAFTIO PROVEMENT PROJECTS 1175 STR 20015014 ACTV 0072 24 952 NEW MEX000 STATE LINE 00010053 SAFET / MEPOREMENT PROJECTS 1175 STR 20015014 ACTV 0072 24 952 D56 MIN 0F SH 176 00010050 EARMANUE FROJECTS 1175 STR 2008508 PDAR 0072 24 952 ML NORE STREET 00010045 LARODOREW VORK 0558 CL 12-46 ACTV 0072 24 952 NL NORE STR	 Begin typing the CSJ in the FIND bar. SiteManager will highlight the entered CSJ. Review the 3rd column (Vendor ID) for the needed 5-digit number to obtain the authorized signers.



To pull a Contractor's Authorized Signer information, you need access to the CMISD SiteManager reports or access to APVM in the APVM-RO (read only) – Vendor Inquiry role.

Use the following steps to identify authorized signer information using the SiteManager report.

CROSS ROADS Apps Districts v Divisions v Resources Safety Portal Q	1. Access the APVM Prime Vendor Authorized Signers report.
Divisions / Construction Division (CSI) / CMISD / SiteManager SiteManager reports	a. From CST's Crossroads page, click on SiteManager under Key Initiatives.
 To ensure you are accessing the latest file, open your web browser settings (CTRL + SHIFT + DEL) and delete cached files. × Please contact the CST_SITEMANAGER email or use the CMISD incident tickets in ServiceNow for any assistance. × 	 b. On the left-hand navigation, click on <u>SiteManager reports</u>.
APVM Q Search	c. Search the table to locate and download the report.
Category ⊕ Title ⊕ Description ⊕ Database ⊕ Parameters ⊕ APVM Prime Vendor Authorized Signers APVM Authorized Signers Displays the authorized signers for prime contractors. SiteManager Vendor ID	
File Home Insert Draw Page Layout Formulas Data Review View Automate Developer Help Acrobat Pate Corpy Image: Corpy <th> Once the report loads, enable the content and click on Get Authorized Signers. </th>	 Once the report loads, enable the content and click on Get Authorized Signers.
Microsoft Excel X Enter the 5 digit SiteManager Vendor ID? OK Cancel	 Enter the 5-digit Vendor ID number identified in previous steps using SiteManager and click OK.



A	В	С	D	E	F
]		APVM Prime Vendor Authorized Signers		Cat Authorized Sidpore
			as of 06/18/2025	Report Last Up-date d by CMISD :: 05-30-2022 1652:24	det Authorized bighers
	SITEMANAGER VENDOR ID	CBS VENDOR ID	VENDORNAME	VENDOR NAME	AUTHORIZED SIGNER
	07904		FNF CONSTRUCTION, INC.	BYRON HUBBARD	ASGN
	07904		FNF CONSTRUCTION, INC.	GAREY P. BRYANT	ASGN
	07904		FNF CONSTRUCTION, INC.	JASON CREACH	ASGN
	07904		FNF CONSTRUCTION, INC.	JASON RUSKEY	ASGN
	07904		FNF CONSTRUCTION, INC.	JIM ANDERSON	ASGN
	07904		FNF CONSTRUCTION, INC.	JOHN GRUBESIC	ASGN
	07904		FNF CONSTRUCTION, INC.	MARTIN RAMIREZ	ASGN
	07904		FNF CONSTRUCTION, INC.	RICHARD MONTOYA	ASGN
	07904		FNF CONSTRUCTION, INC.	ROBERT W. BOTTCHER	ASGN
	07904		FNF CONSTRUCTION, INC.	SHAWN SHEBLE	ASGN
	07904		FNF CONSTRUCTION, INC.	TOM BILLINGS	ASGN
	07904		FNF CONSTRUCTION, INC.	TOM KENNEDY	ASGN

4. The report will identify the list of authorized signers for the vendor. Save a PDF copy of the report.

Use the following steps to access the contractor evaluation form (2707) and review checklist (2707R).

Adobe Experience Manager—Forms	 Log into the <u>eForms application</u>. A. Enter TxDOT User ID. B. Enter Dessword
Password: Login For terms of use, click privalid link: http://www.adobe.com/legal/general-terms.htm/here @2004-2017 Adobe Systems incorporated and its licensors. All rights reserved.	C. Click Login.
Contractor Evaluation Form prev. 02 2707 2707 Contractor Evaluation Form prev. 02 Form 2707 Review CheckSist Serv. 0 Adobe Experience Manager—Forms	 Enter the form number in the search bar and select the form in the list.
Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procession Image: Second Procesin Image: Second Procession <td>3. In the upper right-hand corner, click on the Details tab to access the form links.</td>	3. In the upper right-hand corner, click on the Details tab to access the form links.
200 Promotion Desting (more than the more section) 200 Promotion Desting (more than the more section) 200 Promotion Desting (more than the more section) 200 Desting (more the more section) 200 Destin	Note: Depending on your browser settings, you may have issues accessing the form. If neither link works for you, the forms are also available on the <u>Construction Support</u> Crossroads page.



If requested, use the following steps to prepare the Project Header portion of Form 2707.

Contract (Follow In: Evaluation Type: Final Interim of Project Type: CST MNT Facilities CSJ: Contractor Name: District: V V	Sor Evaluation Form structions on Page 3 of 3) % Complete (from SiteMgr Estimate Package): % Time Used (from SiteMgr Estimate Package): Project #:	Form 2707 (Rev. 03/25) Page 1 of 3	 Complete the project information in the header of Form 2707. Note: The Area Engineer will complete the remainder of the form.
L Instructione: Salar the annihizable ration for each of the criteria bund Regent the foreganding of the criteria bund Regent the criteria bund Regent the foreganding of the criteria bund Regent th	action an "V" in the box for that your The form will non-ulat will we blast vig failed bespice form file generation (control will control will control will be file generation (control will be provided will	a the ration for each of Updata by Weeks Refield Enter which, Of Cont. Of Control, Of Control Mana PL. 1918 Joint Science Mana PL 2018	A. To determine the completion percentages:Open the project in ProjectWise.
<pre></pre>			 Open the latest estimate package that has been processed.
CONTRACT ID: 090600282 PROJECT: BR 2024(781) CONTRACT: 03243215 AWARD AMOUNT: \$2,165,724.00 PROJECTED AMOUNT: \$2,192,274.00 ADJ. PROJECTED AMOUNT: \$2,192,274.00 CONTRACTOR: AMERICAN INFRASTRUCTURE MAINTEN.	HIGHWAY: Various DISTRICT VAME: ODESSA COUNTY: ECTOR AREA ENGINEER: Nestor Mendoza Jr., P.E. AREA NUMBER: 051 ANCE MANAGEMENT LLC		 Enter the percent time used and the percent complete.
ESTIMATE NUMBER 0001 ESTIMATE PAID: 05/03/2024 ESTIMATE PERIOD: 05/03/2024 % COMPLETE: 0.00 % TIME USED: 0.00 % RETAINAGE 0.00	LETTING DATE: AWARD DATE: NOTICE TO PROCEED DATE: WORK BEGIN DATE: ACCEPTED DATE: PHYSICAL WORK COMPLETION DATE:	03/06/2024 03/28/2024 06/03/2024 00/00/0000 00/00/0000 00/00/0000	



- 2. If requested, email Form 2707 and the list of authorized signers to the Area Engineer for completion. Refer to the back of the form and District or Office SOP for additional requirements.
- 3. Once the form has been completed and signed, obtain the original hard copy and file in a secured location as identified in District SOP.

Use the following steps to enter SiteManager Checklist Event Dates for Interim or Performance Evaluations.

Main Panel Contract Administration(+) Contract Records(+) Image: Contract Milestones Image: Contract	 From the Main panel, click on Contract Administration, Contract Records, then Checklist Event Dates and then choose your project.
Streame Key Dates Email Email Email Checklist Scheduled Events Checklist Event Dates Email Email Email	Note: Refer to previous steps to choose project.
	2. Scroll to the Interim Contract Evaluation Event or Performance Evaluation Event.
Contract ID: 256801009	Click on the line so it is highlighted blue.
Event TypeFrequency TypeEvent Group TypeNext Proj DateNext Proj Occrac to ActivateDiscr IndRequired Doc TypeExt IndADATE TIME CHARGES IOne Time Only DTHER10/13/23NYWORK ORDER NNNDBE / CUF REVIEW'S UNINGER Quarterly0THER00/00/001NNNNTDLR INSPECTION One Time Only DTHER00/00/001NNNNMOH PAYMENT Monthly0THER00/22/2318NNNORIGINAL SCHEDULE IOne Time Only DTHER01/22/2416NYPROJECT SCHENINTERIM CONTRACTOR Annually0THER05/14/242NNOTHERV	Click on the New icon (piece of paper) to make a new entry.
ADJUSTED SCHEDULE Konk hills of yother to available to be only of the to available to availabl	 A new line will appear with the projected date. Click on the actual date box and enter the date the evaluation was performed.
06/14/24 00/00/00	



Projected Date 06/14/24	Actual Date 00/00/00	Comments	4	. In the comments section, specify which evaluation this is. (1st interim, 2nd interim Refer to District or Office SOP for additional information.
				Click Save.

Use the following steps to complete Form 2707R.

Form 2707	Form 2707R (Rev. 03/24) Page 1 of 1	1. Download the form from the <u>eForms</u> <u>application</u> .
District: CCSJ:	Date Reviewed: Reset Options Reviewer's Office	I instructions.
Final Evaluation Interim Evaluation In Person Meeting Phone/Virtual Meeting		2. Follow the instructions on the form and District SOP.
*Comments are required if "No" is checked.		