

Contractor Evaluations

Recordkeeper Job Aid

Construction Division

Construction Recordkeeper Job Aid

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)
- *Prime Contractor Performance Evaluations Manual* (<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

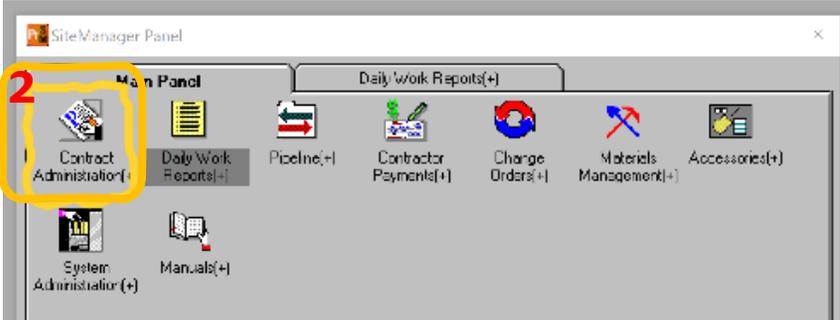
- **Final Evaluations** are due prior to the final estimate generation. These are an overall evaluation of the performance of the contractor for the entirety of the project.

Construction Recordkeeper Job Aid

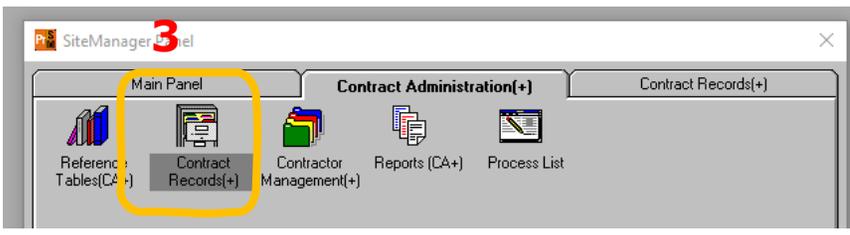
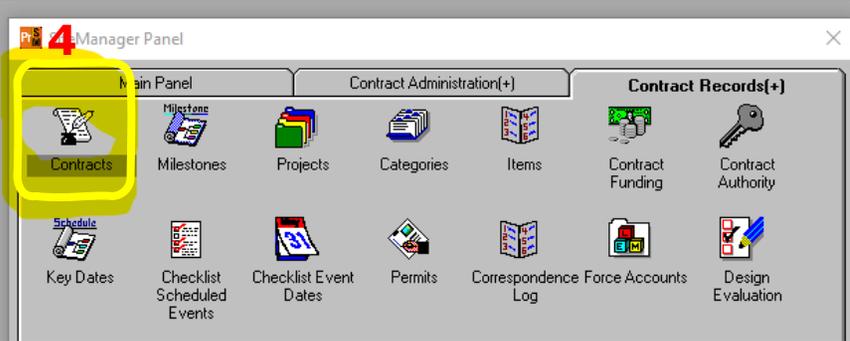
Contractor Evaluations

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.

	<ol style="list-style-type: none"> 1. Log into the SiteManager application. <ol style="list-style-type: none"> A. Enter TxDOT User ID. B. Enter Password. C. Click Logon. Choose your role.
	<ol style="list-style-type: none"> 2. From the SiteManager main panel, double click on Contract Administration.

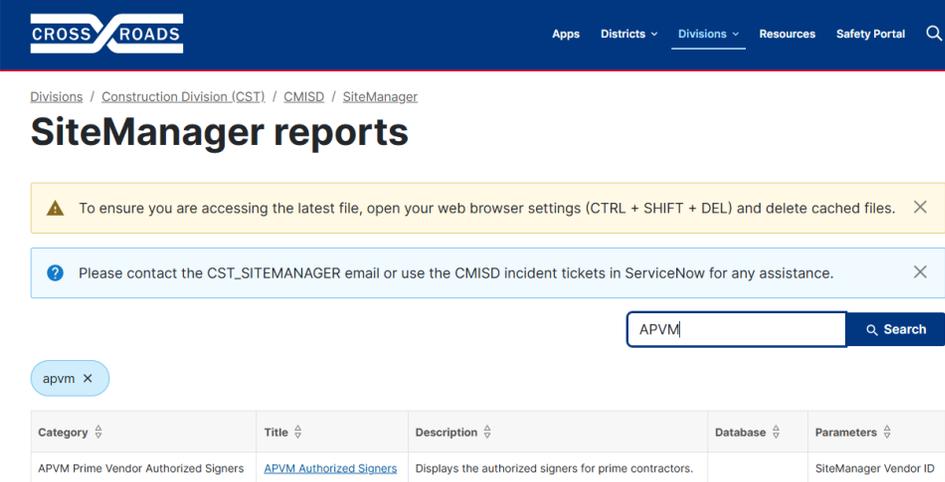
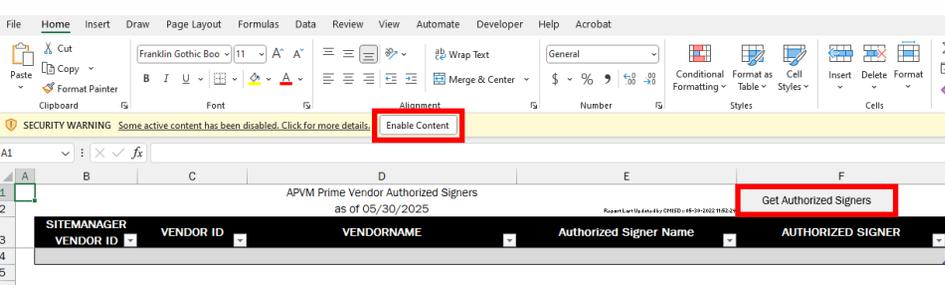
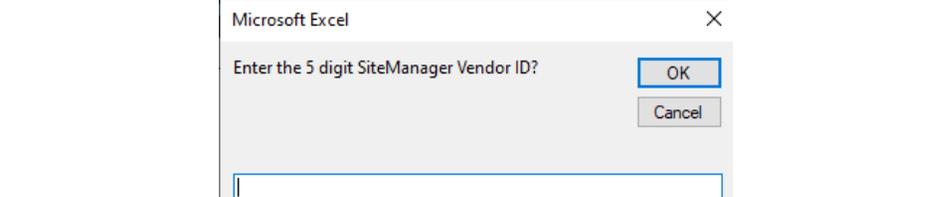
Construction Recordkeeper Job Aid

	<p>3. From the Contract Administration tab, double click on Contract Records.</p>																																																																																																														
	<p>4. From the Contract Records tab, choose Contracts to access the list of contracts available in the system and the associated vendor ID.</p>																																																																																																														
 <table border="1"> <thead> <tr> <th>Contract ID</th> <th>Description</th> <th>Vendor ID</th> <th>Fed State Proj Nbr</th> <th>Status</th> <th>County</th> <th>Lvl 2</th> <th>Lvl 3</th> <th>Lvl 4</th> <th>Location Description1</th> </tr> </thead> <tbody> <tr> <td>00010037</td> <td>UPGRADING OF A NON-FREEWAY</td> <td>12754</td> <td>STP 2002575JR</td> <td>PDAR</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>NEW MEXICO STATE LINE SPUR</td> </tr> <tr> <td>00010054</td> <td>REHABILITATION</td> <td>06203</td> <td>NH 2013043I</td> <td>CMPL</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>NEW MEXICO STATE LINE</td> </tr> <tr> <td>00010058</td> <td>TRAFFIC OPERATION</td> <td>24676</td> <td>CM 2014000J</td> <td>ACTV</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>NM STATE LINE</td> </tr> <tr> <td>00010062</td> <td>SAFETY IMPROVEMENT PROJECTS</td> <td>11756</td> <td>STP 2021620IHES</td> <td>ACTV</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>AT PA 2401/DONIPHAN DR/N MESA ST</td> </tr> <tr> <td>00010063</td> <td>SAFETY IMPROVEMENT PROJECTS</td> <td>21867</td> <td>STP 2021688IHES</td> <td>ACTV</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>0.588 MI N OF SH 176</td> </tr> <tr> <td>00010045</td> <td>REHABILITATION OF EXISTING ROAD</td> <td>12754</td> <td>STP 2009325I</td> <td>PDAR</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>BALTIMORE STREET</td> </tr> <tr> <td>00010046</td> <td>LANDSCAPE WORK</td> <td>06386</td> <td>CL 1-2-46</td> <td>ACTV</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>IH 10 @ TEXAS TRAVEL INFO CENTER</td> </tr> <tr> <td>00010049</td> <td>FY 06 SUPPLEMENTAL REHABILITATION</td> <td>05963</td> <td>STP 2008058I</td> <td>PDAR</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>BALTIMORE ST.</td> </tr> <tr> <td>00010055</td> <td>REHABILITATION OF EXISTING ROAD</td> <td>01000</td> <td>NH 2013079I</td> <td>ACTV</td> <td>C072</td> <td>24</td> <td>052</td> <td></td> <td>SUNLAND PARK DRIVE</td> </tr> <tr> <td>00010056</td> <td>TEXTURIZE SHOULDERS/CENTERLINE</td> <td>21123</td> <td>STP 2019001HES</td> <td>ACTV</td> <td>C072</td> <td>24</td> <td>051</td> <td></td> <td>SH 20 (DONIPHAN)</td> </tr> </tbody> </table>	Contract ID	Description	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location Description1	00010037	UPGRADING OF A NON-FREEWAY	12754	STP 2002575JR	PDAR	C072	24	052		NEW MEXICO STATE LINE SPUR	00010054	REHABILITATION	06203	NH 2013043I	CMPL	C072	24	052		NEW MEXICO STATE LINE	00010058	TRAFFIC OPERATION	24676	CM 2014000J	ACTV	C072	24	052		NM STATE LINE	00010062	SAFETY IMPROVEMENT PROJECTS	11756	STP 2021620IHES	ACTV	C072	24	052		AT PA 2401/DONIPHAN DR/N MESA ST	00010063	SAFETY IMPROVEMENT PROJECTS	21867	STP 2021688IHES	ACTV	C072	24	052		0.588 MI N OF SH 176	00010045	REHABILITATION OF EXISTING ROAD	12754	STP 2009325I	PDAR	C072	24	052		BALTIMORE STREET	00010046	LANDSCAPE WORK	06386	CL 1-2-46	ACTV	C072	24	052		IH 10 @ TEXAS TRAVEL INFO CENTER	00010049	FY 06 SUPPLEMENTAL REHABILITATION	05963	STP 2008058I	PDAR	C072	24	052		BALTIMORE ST.	00010055	REHABILITATION OF EXISTING ROAD	01000	NH 2013079I	ACTV	C072	24	052		SUNLAND PARK DRIVE	00010056	TEXTURIZE SHOULDERS/CENTERLINE	21123	STP 2019001HES	ACTV	C072	24	051		SH 20 (DONIPHAN)	<p>5. The Select Contract menu will allow a search by CSJ (Contract ID). Click in the contract ID area.</p> <p>6. 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.</p>
Contract ID	Description	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location Description1																																																																																																						
00010037	UPGRADING OF A NON-FREEWAY	12754	STP 2002575JR	PDAR	C072	24	052		NEW MEXICO STATE LINE SPUR																																																																																																						
00010054	REHABILITATION	06203	NH 2013043I	CMPL	C072	24	052		NEW MEXICO STATE LINE																																																																																																						
00010058	TRAFFIC OPERATION	24676	CM 2014000J	ACTV	C072	24	052		NM STATE LINE																																																																																																						
00010062	SAFETY IMPROVEMENT PROJECTS	11756	STP 2021620IHES	ACTV	C072	24	052		AT PA 2401/DONIPHAN DR/N MESA ST																																																																																																						
00010063	SAFETY IMPROVEMENT PROJECTS	21867	STP 2021688IHES	ACTV	C072	24	052		0.588 MI N OF SH 176																																																																																																						
00010045	REHABILITATION OF EXISTING ROAD	12754	STP 2009325I	PDAR	C072	24	052		BALTIMORE STREET																																																																																																						
00010046	LANDSCAPE WORK	06386	CL 1-2-46	ACTV	C072	24	052		IH 10 @ TEXAS TRAVEL INFO CENTER																																																																																																						
00010049	FY 06 SUPPLEMENTAL REHABILITATION	05963	STP 2008058I	PDAR	C072	24	052		BALTIMORE ST.																																																																																																						
00010055	REHABILITATION OF EXISTING ROAD	01000	NH 2013079I	ACTV	C072	24	052		SUNLAND PARK DRIVE																																																																																																						
00010056	TEXTURIZE SHOULDERS/CENTERLINE	21123	STP 2019001HES	ACTV	C072	24	051		SH 20 (DONIPHAN)																																																																																																						

Construction Recordkeeper Job Aid

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.

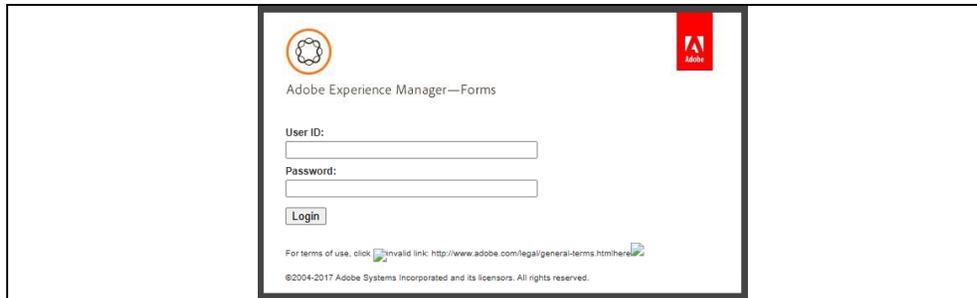
	<ol style="list-style-type: none"> 1. Access the APVM Prime Vendor Authorized Signers report. <ol style="list-style-type: none"> a. From CST's Crossroads page, click on SiteManager under Key Initiatives. b. On the left-hand navigation, click on SiteManager reports. c. Search the table to locate and download the report.
	<ol style="list-style-type: none"> 2. Once the report loads, enable the content and click on Get Authorized Signers.
	<ol style="list-style-type: none"> 3. Enter the 5-digit Vendor ID number identified in previous steps using SiteManager and click OK.

Construction Recordkeeper Job Aid

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. BOTTCHE	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.

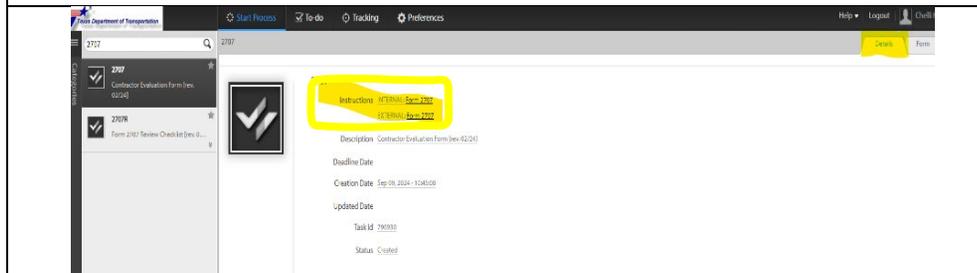
Use the following steps to access the contractor evaluation form (2707) and review checklist (2707R).



1. Log into the [eForms application](#).
 - A. Enter TxDOT User ID.
 - B. Enter Password.
 - C. Click Login.



2. Enter the form number in the search bar and select the form in the list.

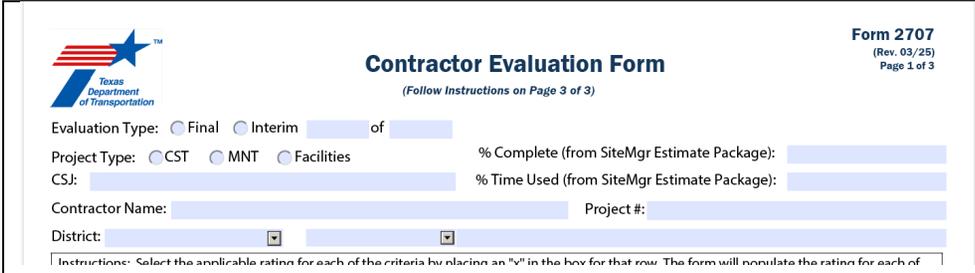
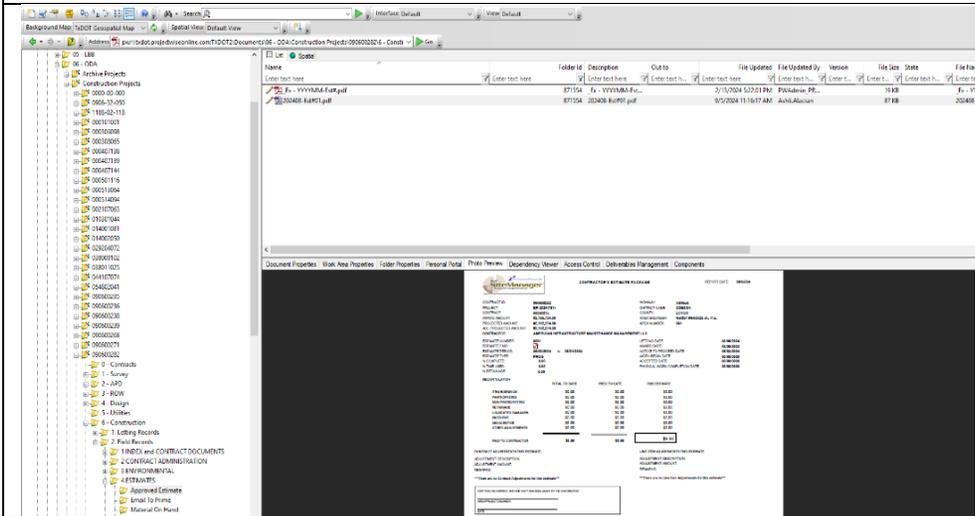


3. In the upper right-hand corner, click on the Details tab to access the form links.

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 [Construction Support Crossroads](#) page.

Construction Recordkeeper Job Aid

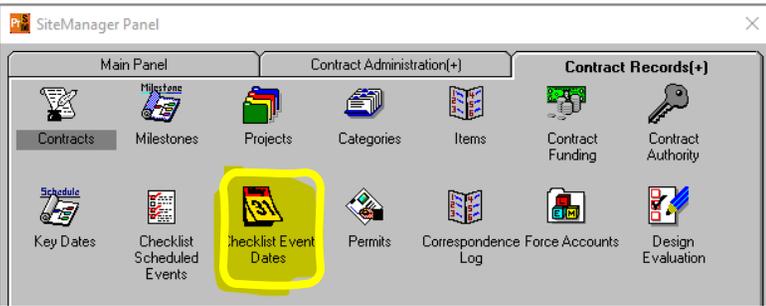
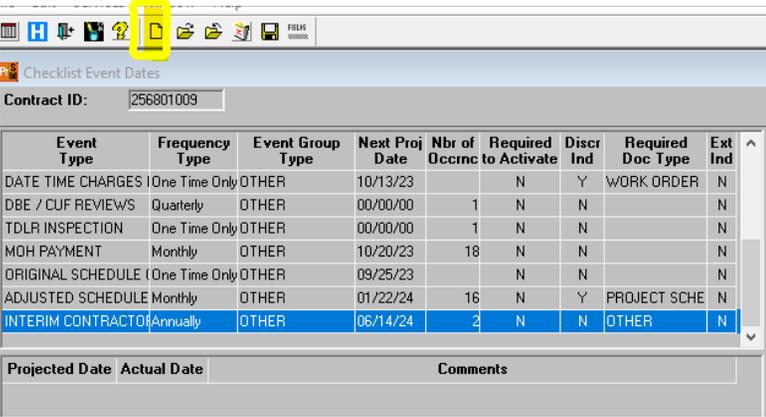
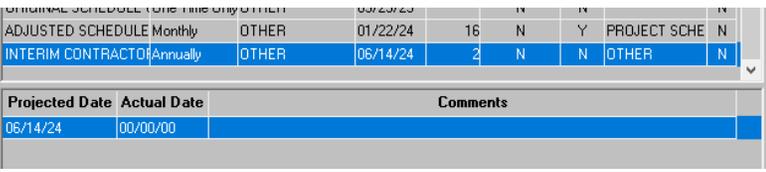
If requested, use the following steps to prepare the Project Header portion of Form 2707.

 <p>Form 2707 (Rev. 03/25) Page 1 of 3</p> <p>Contractor Evaluation Form (Follow Instructions on Page 3 of 3)</p> <p>Evaluation Type: <input type="radio"/> Final <input type="radio"/> Interim of _____</p> <p>Project Type: <input type="radio"/> CST <input type="radio"/> MNT <input type="radio"/> Facilities % Complete (from SiteMgr Estimate Package): _____</p> <p>CSJ: _____ % Time Used (from SiteMgr Estimate Package): _____</p> <p>Contractor Name: _____ Project #: _____</p> <p>District: _____</p> <p><small>Instructions: Select the applicable rating for each of the criteria by placing an "X" in the box for that row. The form will populate the rating for each of</small></p>	<p>1. Complete the project information in the header of Form 2707.</p> <p>Note: The Area Engineer will complete the remainder of the form.</p>
	<p>A. To determine the completion percentages:</p> <ul style="list-style-type: none"> • Open the project in ProjectWise. • Open the latest estimate package that has been processed.
<p>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 MAINTENANCE MANAGEMENT LLC</p> <p>ESTIMATE NUMBER: 0001 ESTIMATE PAID: <input checked="" type="checkbox"/> ESTIMATE PERIOD: 05/03/2024 to 08/31/2024</p> <p>% COMPLETE: 0.00 % TIME USED: 0.00 % RETAINAGE: 0.00</p> <p>HIGHWAY: Various DISTRICT NAME: ODESSA COUNTY: ECTOR AREA ENGINEER: Nestor Mendoza Jr., P.E. AREA NUMBER: 051</p> <p>LETTING DATE: 03/06/2024 AWARD DATE: 03/28/2024 NOTICE TO PROCEED DATE: 05/03/2024 WORK BEGIN DATE: 00/00/0000 ACCEPTED DATE: 00/00/0000 PHYSICAL WORK COMPLETION DATE: 00/00/0000</p>	<ul style="list-style-type: none"> • Enter the percent time used and the percent complete.

Construction Recordkeeper Job Aid

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.

	<ol style="list-style-type: none"> 1. From the Main panel, click on Contract Administration, Contract Records, then Checklist Event Dates and then choose your project. Note: Refer to previous steps to choose project.
	<ol style="list-style-type: none"> 2. Scroll to the Interim Contract Evaluation Event or Performance Evaluation Event. Click on the line so it is highlighted blue. Click on the New icon (piece of paper) to make a new entry.
	<ol style="list-style-type: none"> 3. A new line will appear with the projected date. Click on the actual date box and enter the date the evaluation was performed.

Construction Recordkeeper Job Aid

Projected Date	Actual Date	Comments
06/14/24	00/00/00	

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 Review Checklist

Form 2707R (Rev. 01/24) Page 1 of 1

District: CCSJ: Date Reviewed:

Reviewer: Reviewer's Office:

Final Evaluation Interim Evaluation
 In Person Meeting Phone/Virtual Meeting

*Comments are required if "No" is checked.

Yes | Was the correct version of the Form 2707 used?

1. Download the form from the [eForms application](#).

Note: Refer to previous steps for instructions.

2. Follow the instructions on the form and District SOP.