

Contractor Evaluations

Recordkeeper Job Aid

Construction Division



Texas Department of Transportation

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)
(<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

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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.

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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 Login. <p>Choose your role.</p>
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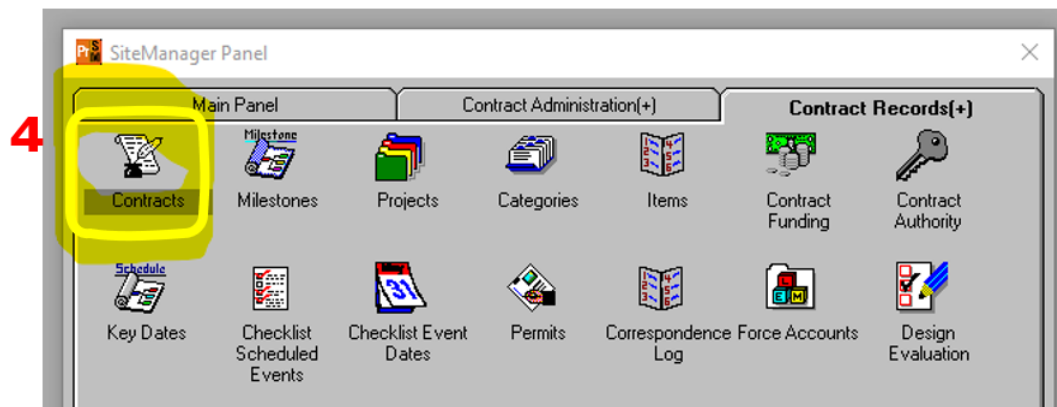
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2. From the SiteManager main panel, double click on Contract Administration.



3. From the Contract Administration tab, double click on Contract Records.



4. From the Contract Records tab, choose Contracts to access the list of contracts available in the system and the associated vendor ID.

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5 Selection
Contract ID

6 Find
Contract ID

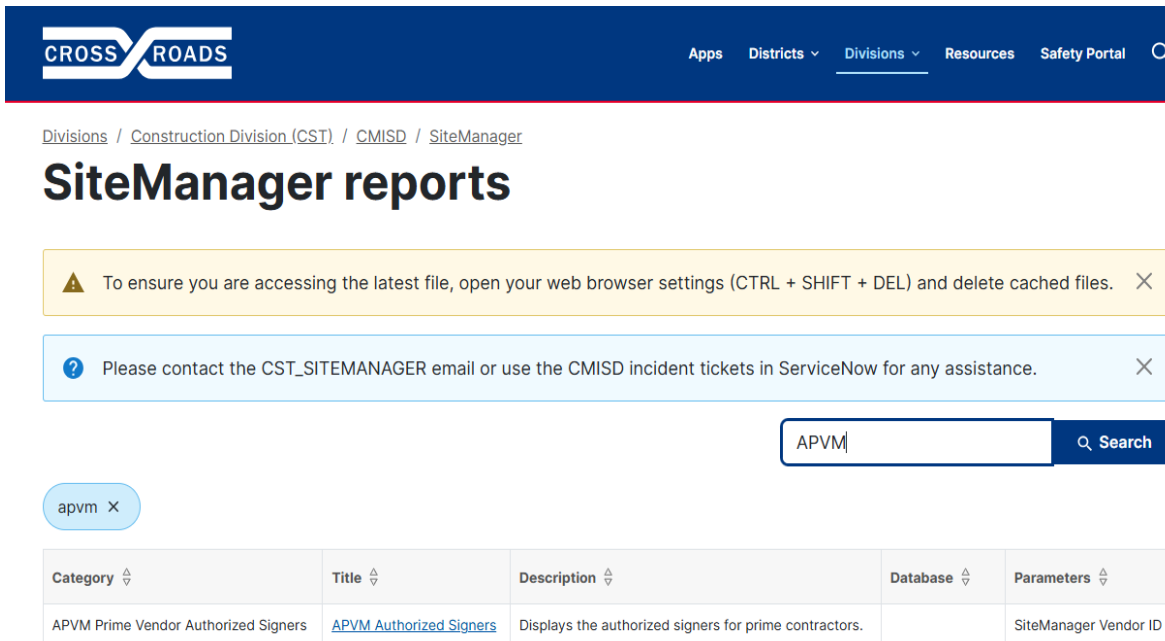
Contract ID	Description	Vendor ID	Status	Location	Level 1	Level 2	Level 3	Level 4	Location Description
000101037	UPGRADING OF A NON-FREEWAY	12754	STP 2002575R	PDAR	D072	24	052		NEW MEXICO STATE LINE SPUR
000101054	REHABILITATION	06203	NH 2013043	CMPL	D072	24	052		NEW MEXICO STATE LINE
000101058	TRAFFIC OPERATION	24676	CM 2014000	ACTV	D072	24	052		NM STATE LINE
000101062	SAFETY IMPROVEMENT PROJECTS	11756	STP 2021620JHES	ACTV	D072	24	052		AT PA 2401/DONIPHAN DR/N MESA ST
000101063	SAFETY IMPROVEMENT PROJECTS	21857	STP 2021608JHES	ACTV	D072	24	052		0.580 MIN OF SH 170
000102045	REHABILITATION OF EXISTING ROAD	12754	STP 2009325J	PDAR	D072	24	052		BALTIMORE STREET
000102046	LANDSCAPE WORK	06386	CL 1-2-46	ACTV	D072	24	052		IH 10 @ TEXAS TRAVEL INFO CENTER
000102049	FY 06 SUPPLEMENTAL REHABILITATION	06363	STP 2008668J	PDAR	D072	24	052		BALTIMORE ST.
000102055	REHABILITATION OF EXISTING ROAD	01000	NH 2019761	ACTV	D072	24	052		SUNLAND PARK DRIVE
000102056	TEXTURIZE SHOULDERS/CENTERLINE	21123	STP 2019501JHES	ACTV	D072	24	051		SH 20 (DONIPHAN)

5. The Select Contract menu will allow a search by CSJ (Contract ID). Click in the contract ID area.
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.

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Note: 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.

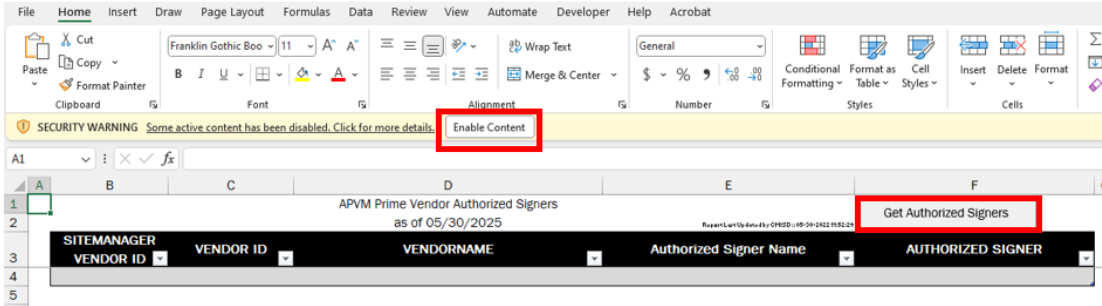


The screenshot shows the Crossroads website interface. At the top is a dark blue header with the 'CROSSROADS' logo and navigation links: Apps, Districts, Divisions, Resources, and Safety Portal. Below the header, the breadcrumb trail reads: Divisions / Construction Division (CST) / CMISD / SiteManager. The main heading is 'SiteManager reports'. There are two informational banners: a yellow one about browser cache and a light blue one about contacting CST_SITEMANAGER. A search bar contains 'APVM' with a 'Search' button. A filter pill for 'apvm' is active. Below is a table with one row of data.

Category	Title	Description	Database	Parameters
APVM Prime Vendor Authorized Signers	APVM Authorized Signers	Displays the authorized signers for prime contractors.		SiteManager Vendor ID

1. Access the APVM Prime Vendor Authorized Signers report.
 - 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.

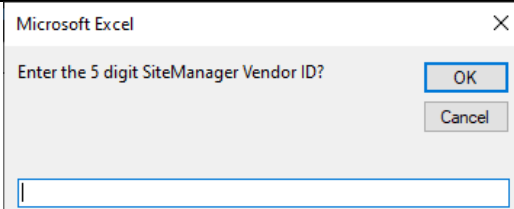
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Microsoft Excel interface showing the 'Enable Content' button highlighted in a red box. The spreadsheet displays 'APVM Prime Vendor Authorized Signers as of 05/30/2025'. The table structure is as follows:

SITEMANAGER	VENDOR ID	VENDORNAME	Authorized Signer Name	AUTHORIZED SIGNER
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2. Once the report loads, enable the content and click on Get Authorized Signers.



Microsoft Excel dialog box titled 'Enter the 5 digit SiteManager Vendor ID?'. The dialog box contains an input field and 'OK' and 'Cancel' buttons.

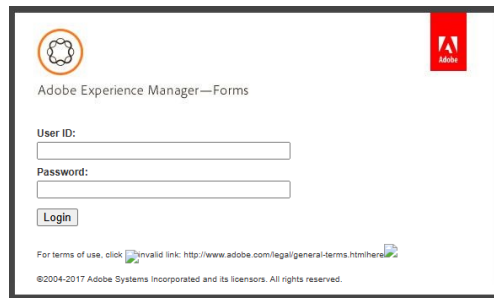
3. Enter the 5-digit Vendor ID number identified in previous steps using SiteManager and click OK.

APVM Prime Vendor Authorized Signers as of 06/18/2025					Get Authorized Signers
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. BOTTCHEER	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.

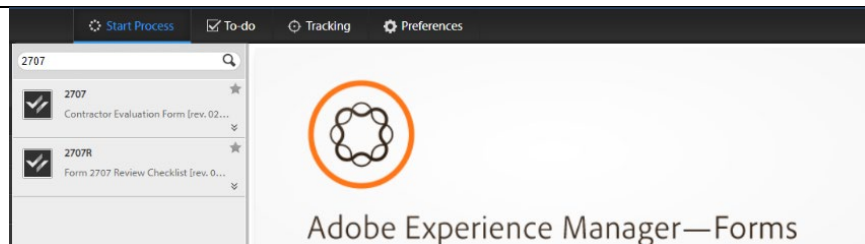
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Use the following steps to access the contractor evaluation form (2707) and review checklist (2707R).



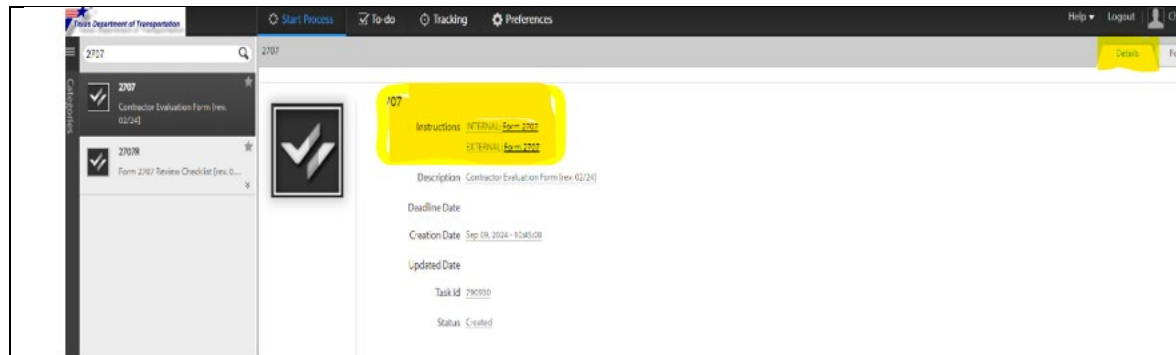
1. Log into the [eForms application](#).

- A. Enter TxDOT User ID.
- B. Enter Password.
- C. Click Login.



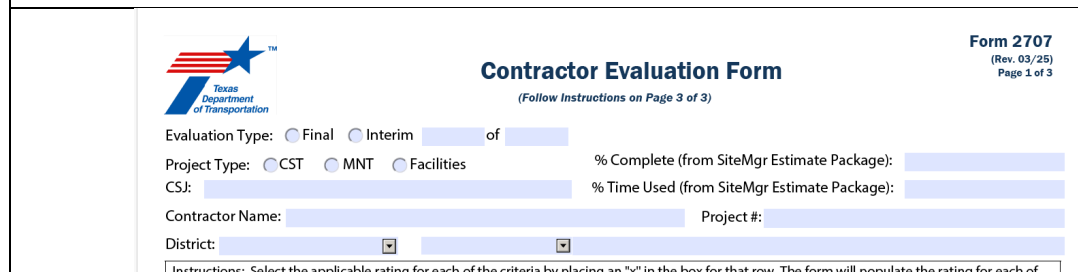
2. Enter the form number in the search bar and select the form in the list.

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

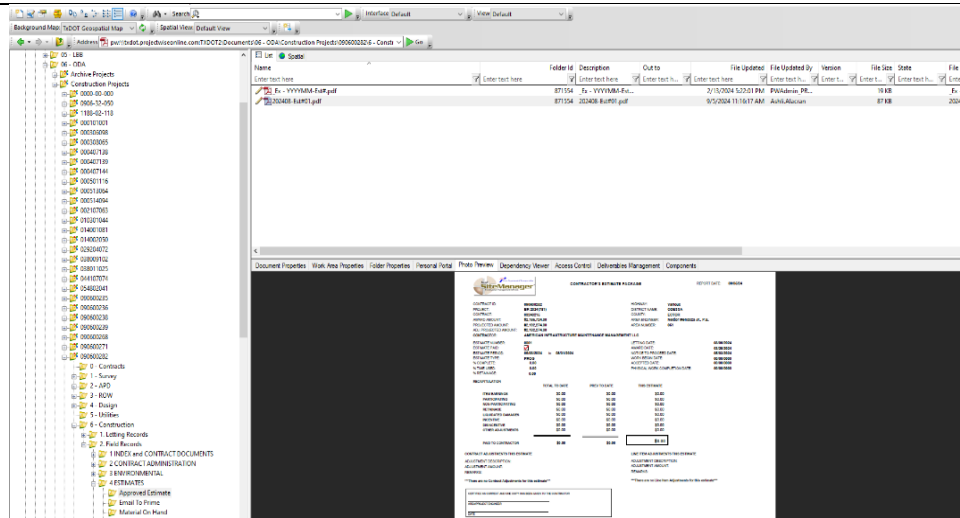
Note: Depending on your browser settings, you may have issues accessing the form. If neither link works for you, the forms are also available on the [Construction Support Crossroads](#) page.



4. Complete the project information in the header of Form 2707.

Note: The Area Engineer will complete the remainder of the form.

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5. To determine the completion percentages:

- Open the project in ProjectWise.
- Open the latest estimate package that has been processed.

CONTRACT ID:	090600282	HIGHWAY:	Various
PROJECT:	BR 2024(781)	DISTRICT NAME:	ODESSA
CONTRACT:	03243215	COUNTY:	ECTOR
AWARD AMOUNT:	\$2,165,724.00	AREA ENGINEER:	[REDACTED]
PROJECTED AMOUNT:	\$2,192,274.00	AREA NUMBER:	051
ADJ. PROJECTED AMOUNT:	\$2,192,274.00		
CONTRACTOR:	AMERICAN INFRASTRUCTURE MAINTENANCE MANAGEMENT LLC		
ESTIMATE NUMBER:	0001	LETTING DATE:	03/06/2024
ESTIMATE PAID:	<input checked="" type="checkbox"/>	AWARD DATE:	03/28/2024
ESTIMATE PERIOD:	05/03/2024 to 08/31/2024	NOTICE TO PROCEED DATE:	05/03/2024
ESTIMATE TYPE:		WORK BEGIN DATE:	00/00/0000
		ACCEPTED DATE:	00/00/0000
		PHYSICAL WORK COMPLETION DATE:	00/00/0000

% COMPLETE:	0.00
% TIME USED:	0.00
% RETAINAGE:	0.00

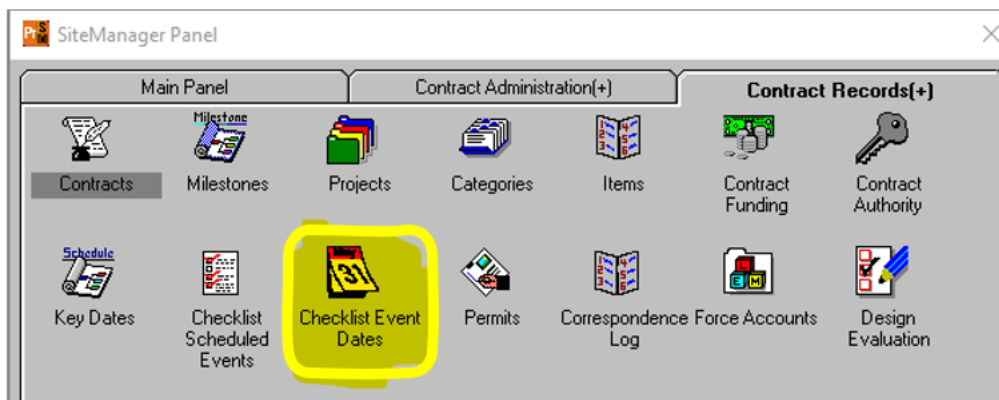
6. Enter the percent time used and the percent complete.

Note:

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

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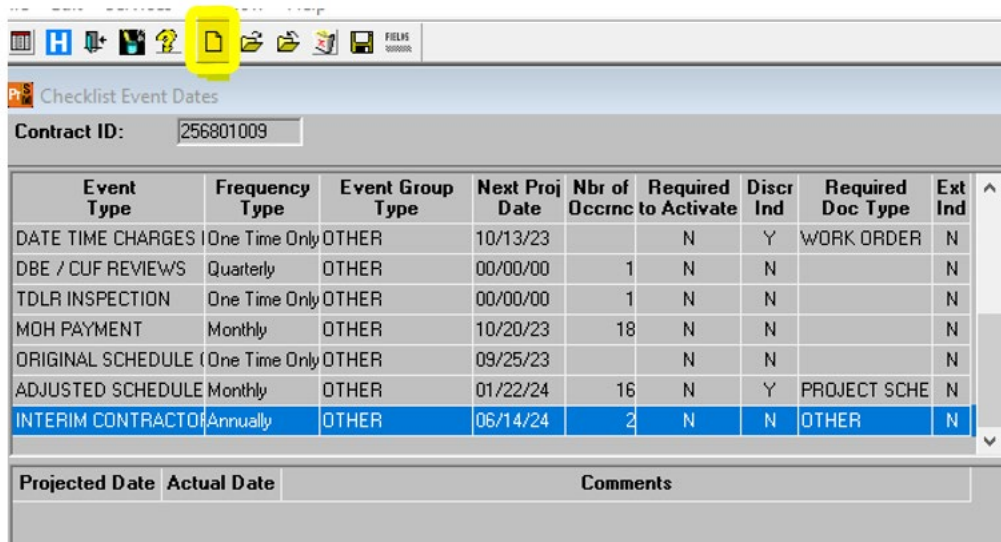
Use the following steps to enter SiteManager Checklist Event Dates for Interim or Performance Evaluations.



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.

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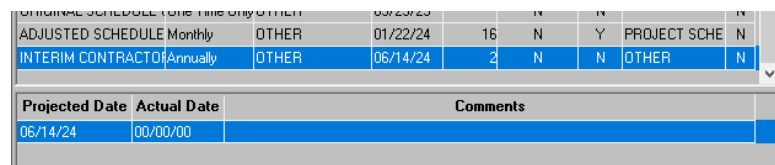
Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
DATE TIME CHARGES	One Time Only	OTHER	10/13/23		N	Y	WORK ORDER	N
DBE / CUF REVIEWS	Quarterly	OTHER	00/00/00	1	N	N		N
TDLR INSPECTION	One Time Only	OTHER	00/00/00	1	N	N		N
MOH PAYMENT	Monthly	OTHER	10/20/23	18	N	N		N
ORIGINAL SCHEDULE	One Time Only	OTHER	09/25/23		N	N		N
ADJUSTED SCHEDULE	Monthly	OTHER	01/22/24	16	N	Y	PROJECT SCHE	N
INTERIM CONTRACTOR	Annually	OTHER	06/14/24	2	N	N	OTHER	N

Projected Date	Actual Date	Comments

2. Scroll to the Interim Contract Evaluation Event or Performance Evaluation Event.

Click on the line so it is highlighted blue.

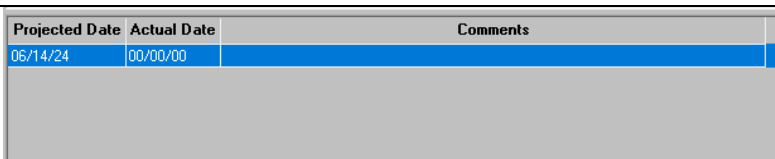
Click on the New icon (piece of paper) to make a new entry.



Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
ADJUSTED SCHEDULE	Monthly	OTHER	01/22/24	16	N	Y	PROJECT SCHE	N
INTERIM CONTRACTOR	Annually	OTHER	06/14/24	2	N	N	OTHER	N

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

3. A new line will appear with the projected date. Click on the actual date box and enter the date the evaluation was performed.

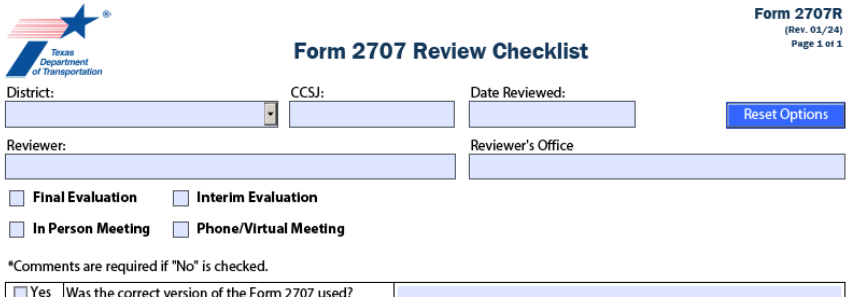


Projected Date	Actual Date	Comments
06/14/24	00/00/00	

4. In the comments section, specify which evaluation this is. (1st interim,

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	<p>2nd interim). Refer to District or Office SOP for additional information.</p> <p>Click Save.</p>
Use the following steps to complete Form 2707R.	
 <p>The screenshot shows the "Form 2707 Review Checklist" from the Texas Department of Transportation. It includes fields for District, CCSJ, Date Reviewed, Reviewer, and Reviewer's Office. There are checkboxes for Final Evaluation, Interim Evaluation, In Person Meeting, and Phone/Virtual Meeting. A "Reset Options" button is also visible. A note states: "*Comments are required if 'No' is checked." Below this, there is a checkbox for "Yes" and a text field for "Was the correct version of the Form 2707 used?".</p>	<ol style="list-style-type: none">1. Download the form from the eForms application. <p>Note: Refer to previous steps for instructions.</p> <ol style="list-style-type: none">2. Follow the instructions on the form and District SOP.