Session Discussion Q&A:

CST DIV, Deputy Director, APCM Rollout updates

Will we still be able to generate similar Site Manager reports in APCM?
Yes, similar reports will be available in APCM. However, their format may differ slightly. For example, you may be able to generate reports specific to the CSJ (Control-Section-Job) currently in use.

Will the project reports be through Excel, and when do we start utilizing APCMs reports?
Yes, APCM will offer functionality to export reports in Excel format. Report access will begin as APCM deployment progresses.

When will APCM training begin?
Training is anticipated to begin closer to December 2025. We are currently validating system functionality through the pilot program. Reports will either be accessible via Tableau dashboards or integrated directly into APCM. The DAL regional rollout is scheduled for May 2026.

https://www.txdot.gov/business/resources/apcm.html

Will trainings/workshops be available to CEI? Also, will CEI contractors have to request access to APCM just like SM?
Yes, training opportunities will be available for CEIs. CEI contractors should monitor the APCM resource website for updates. We recommend bookmarking the link provided, as training materials and access guidance will be posted there.

Will there be any SOP guidance for APCM other than the training?
Yes, we are actively reviewing and updating the APCM manual to ensure alignment with the new software features and workflows.

FIN DIV, Accounts Payable briefs

How do we identify the original estimate that caused an overpayment due to Materials On Hand (MOH)?
If you are tracking MOH month to month per CCAM then you would have to research the provided submission and corresponding payments to determine when the overpayment occurred. MOH deductions accumulate until the balance reaches zero. This estimate is critical for refund documentation and audit tracking.

Can districts choose whether the August estimate runs through the 25th or the 31st? Is it possible to generate two separate estimates?
The recommendation to generate a single estimate for August is to align with Finance Division procedures and reduce complications during fiscal year closeout. If an estimate is created crossing fiscal years, it will be labeled for rejection. Be on the lookout for updated guidance via email or internal communications each year.

What is the "JV" referred to in documentation?
JV220 refers to a Journal Voucher for refund of revenue, this form is used to apply the refund back to the budget, Finance completes this form. Finance has indicated they will share updates related to this form to be communicated district-level later this year.
The Deposit and Payment Application team also maintains the current version on their SharePoint, latest version:
Oracle Cashiering System SharePoint (see "Documents")
https://txdot.sharepoint.com/sites/OracleCashieringSystem

What information is needed for estimates exceeding $5 million?
This requirement ensures proper tracking and review of high-value payments. Refer to the presentation slides for additional context and examples.
The following details must be included:

- CSJ (Control-Section-Job) number
- Estimate number
- Dollar amount
- Contractor name

Is it not necessary to submit a PDF or send email notifications for a $0 final estimate to FIN?
No. Finance Division does not require notification for $0 estimates; notification is not necessary. However, if the estimate is **negative** and a refund is being requested, notification is required. In that case, districts must provide supporting documentation as outlined in the presentation and CST TIP–Estimates guidance. for additional guidance, see the "Negative Estimates" section of
CST TIP–Estimates (pdf) https://crossroads/divisions/cst/construction-support.html, Construction tips dropdown box.

FHWA and Buy America updates

Is there any guidance similar to the Buy America for the Buy Texas requirements?
There is no formal "Buy Texas" requirement equivalent to Buy America for federally funded projects. For state-funded projects TxDOT may have procurement preferences, but these are not governed by the same federal compliance rules. For clarification on state-specific purchasing policies, contact the TxDOT Procurement Division.

If a material is listed on the Material Producer List (MPL), in documentation, do we still need to save the invoice and a screenshot of the MPL in the project files?If an item is on the Material Producer List (MPL), you do not need to snip the MPL. However, you should retain the invoice or delivery ticket, document with the pay item and verify source is located on the MPL. If the item is not on the MPL, then a Form 1818 or 2806 is required. MDT issues test reports for certain materials and maintains the associated records.

How do we find out if a project is classified as Texas Division Involved Project (TxDIP)?
Refer to Construction Divisions Construction Support section on Crossroads for the list of TxDIPs (Texas Division Involved Project). A project will remain a TxDIP until modified by FHWA. CST has forwarded notifications to DOCs.

Will documentation requirements for Special Provision 006-005 be the same as those for SP 006-040?
Yes. SP006-005 set a definition for predominantly iron and steel. Precast concrete products or iron/steel enclosures of ITS products need to continue to comply with Buy America requirements for iron and steel regardless of being classified as a manufactured product. Manufactured products are currently waived.

What is De Minimis log, when is it used?
The De Minimis log is a tracking tool used to document the cost of all non-compliant materials. The total cost of non-compliant materials must be the de minimis threshold for the respective classification. The log is required when the contractor request to use non-compliant materials.

What is the remedy for going over the de minimis, say because a change order reduces the contract amount?
If threshold is exceeded, the non-compliant material cannot be permanently installed on the project. The recommendation is to remove and replace with complaint material or do not pay for the item all together. Iron and Steel requirements do apply to all projects. If considering purchasing the material using non-participating funds, ensure that the product may be used. For example, a non-compliant construction material may be installed on some state funded or maintenance projects. Non-compliant iron or steel products are still required to me Buy America requirements.

The subcontractor list states current version of FHWA 1273 and Wage Rates. Does this mean the version at the time of proposal or the most recent version the year when the project started?
The general rule is that the wage rate table has to match with the contract letting year. Use FHWA 1273 version that was bid on and awarded. Always refer to the proposal in the project files for the correct versions. Additional Wage rate specific questions you can reach out to Melissa Daniels as she is the Senior Labor Compliance Officer.

For projects flagged on the Federal Inactive Project List, is it sufficient to charge time to the controlling CSJ, or must each CSJ show activity?
Time would have to be charged to a CSJ that is set up with federal funds. If CSJ doesn't have federal funds on the CE Activity, then the project won't process a federal billing. If there are multiple federal contracts on a SiteManager Contract and the Contract isn't being prorated, then time needs to be charged to each CSJ on the SiteManager Contract cause otherwise the controlling CSJ will receive activity from the time charge but the other CSJs and federal contracts will stay inactive cause no time was charged to those CSJs. Each federally funded CSJ must show activity within a 12-month period to avoid being flagged as inactive.

Will the Project Records Checklist be updated to reflect Buy America and 2024 Specification changes?
Yes. The Project Records Checklist is being updated as part of ongoing improvements to align with the 2024 Specification Book and Buy America requirements. Updates are reviewed regularly by CST, reflected in the Construction Contract Administration Manual (CCAM) and related job aids. Material and Test Division MTD collaborates on changes and posts the updates.

Can professional service firms be added to the E-Verify list?
Yes. Professional Services such as engineering companies are not subcontractors. CST defers to PEPS for E-Verify requirements for professional services.

Is Form 2807 (Time Suspension) required, or can a DocuSigned letter be used instead?
Form 2807 is the preferred and standardized format for documenting time suspensions. While a DocuSigned letter may be acceptable if it includes all required information, using the official form is strongly recommended for consistency, audit readiness, and alignment with CST procedures.

Const. and Maint. Contract Letting Section briefs

Insurance: If a contractor/subcontractor has a new address or phone number, who should be contacted to update that information?
The contractor can contact the Prequalification team, updates must be submitted to CST_Prequalification@txdot.gov via an official signed letter from an authorized signer or from the authorized email on file. CMCL would not be contacted for subcontractors, any changes to subcontractor information, contact the SiteManager team. The Insurance Team does not process address or phone number changes—they only update insurance records for prime contractors in APVM.

Does the district have access to look at their insurance status? If so, how do we access it?
Yes. District staff can access insurance records through APVM, as a VIEW only role. To gain access, submit an IT ticket requesting the VENDINQ – RO role. Approval typically takes 2–5 business days and is processed through ITD-UAM and CST-CMISD.

Do insurance certificates need to be stored in the project files (ProjectWise), or is this handled by the Division?
There is no requirement to store insurance certificates in ProjectWise unless specifically requested or needed for a specific project issue or audit. CST manages the insurance for prime/qualified contractors with active project(s) and our system of record is APVM. We store the certificates within our local files.

If a construction project is nearing completion and insurance is about to expire, is it still required?
Yes. All insurance must remain current until final acceptance of the project. This includes standard or project specific insurance, special, and railroad insurance unless the project engineer explicitly states otherwise. For more details, please refer to item 4.3 of the relevant Spec Book, Insurance.

What happens if a contractor does not renew their insurance during the closeout phase?
If insurance expires, Stop Work notice will be issued by CST. Any gaps in coverage will be referred to Compliance for investigation and potential enforcement. Maintaining continuous coverage is essential through final acceptance.

What is the Area Office responsible for collecting or managing regarding insurance?
The Area Office/Recordkeeper is not responsible for collecting or storing insurance documents, responsibility is with enforcing Stop Work notices in the field if issued due to insurance lapses. All the insurance for prime/qualified contractors with active project(s) is managed by CST.

If CST sends a Stop Work notice due to insurance issues, does the Area Office also need to send another separate notice to the prime contractor?
No, CST handles the official Stop Work notification. The Area Office is not required to send any notice but is responsible for enforcing the Stop Work directive on the project site until CST issues a Resume Work notice. This includes ensuring that no work continues until the required documentation or compliance issue is resolved.

E-Verification; What about service a contractor uses such as a crane company for setting beams on bridges? Do they have to be identified as subcontractors?

Due to varying applicability, multiple factors and that the US Department of Labor sets criteria for classification, please direct those specific questions to Melissa Daniels as she is the Senior Labor Compliance Officer or refer to CSTs Labor and Compliance webpage that displays the general requirements.

https://crossroads/divisions/cst/labor-compliance.html

Do contractors have to renew their E-Verify status annually? How or why would they be removed from the E-Verify list?

Contractors are not required to renew E-Verify annually, but they must maintain an active account. The system is designed to automatically terminate accounts after 274 days (approximately 9 months) of inactivity.

If a contractor's account is terminated and they still have active contracts, they must:

- Submit a rescission of termination or
- Provide a new fully executed Memorandum of Understanding (MOU)
- Failure to comply within 5 calendar days may result in a Stop Work notice being issued. (Refer to presentation slide for more details.)

Are all subcontractors required to carry Railroad Protective Liability (RRPL) insurance along with the contractor on projects with railroad involvement?

TxDOTs RRPL requirement is directed to the prime contractor, refer to Railroad Scope of Work sheets and project-specific insurance requirements or contact your District's RR coordinator and/or RR DIV for guidance.

The presentation mentioned no work within 50 feet of the railroad, but the document says 50 feet from the RR ROW., which has been interpreted in the past as 25' from either side of the RR ROW totaling 50'. Is that the same?

Please contact RR DIV or District RR coordinator in obtaining the official guidance response or further clarification as it pertains to the project.

What is the Area Office responsible for collecting when it comes to Railroad Requirements? Are these documents usually collected before contract execution?

AO would not be collecting as all required documents for contract execution such as Right of Entry (ROE) and Maintenance Consent Letters (MCL) and insurance documents depending on the plan's requirements are submitted to CST **before** the contract is executed. After execution, CST no longer collects MCL/ROE extensions but continues to manage insurance.

What should we do if the Railroad (RR) representative doesn’t respond, especially when the Maintenance Consent Letter (MCL) says to contact them 45 days before construction, but the contract only allows a 30-day delay?
If the RR representative is unresponsive, CST recommends:
- Documenting all outreach attempts to the RR representative.
- Contacting the District’s RR coordinator and/or RR DIV for guidance or escalation support.

Can the Area Office request railroad-related documents (like ROEs or MCLs) from CST for their records?
CST may be able to provide certain documents upon request, but not all are retained or distributed. If you need a specific document, contact CMCL, currently to review. If the request is being made in response to a public or Open Records Request (ORR), it must be routed through CST’s ORR coordinator for proper handling. If the District is requesting information for their record, as stated in the question, they don’t need to put in an ORR.

Does the Railroad Division (RRD) share documentation directly with Area Offices? How would we know if CST has received the ROE or MCL—by CST, from the contractor, or from RRD?
CST tracks this internally as part of the contract execution process. CST confirms receipt of ROE or MCL from RRD, during contract award review and would not send confirmation to the District. When CST has the required documents, then contract will be executed. Any deviation to the contract requirements are only granted through the conditional release and/or administrative letter, in this instance if there is a question you may need to follow up with CST or check the contract documentation manually.

Can we use the SiteManager (SM) reports to verify contractor insurance status for railroad-related work?
While SiteManager has insurance reports, they currently do not pull from APVM, the official source of record. CST recommends using APVM for accurate and up-to-date information, not the SM version. To access APVM, submit an IT ticket for APVM requesting view/read-only access (VENDINQ – RO) or contact CST_Support@txdot.gov. Once the SiteManager report is updated to reflect APVM data, CST will share updated guidance.

Civil Rights Division briefs

Where will SBE (Small Business Enterprise) projects be tracked now that the Mainframe is being retired?
SBE projects, along with other TxDOT construction and maintenance projects, will be tracked through Project Tracker, TxDOT's centralized online portal for project information. Project Tracker provides real-time access to project status, funding sources, timelines, and more. It is designed to replace legacy systems, including the Mainframe, and serves as the official source for tracking transportation projects across the state. CIV will continue to look into the matter in the meantime, please file the Final Report in ProjectWise.
You can access Project Tracker here:
TxDOT Project Tracker
For more information on the SBE program itself, including certification and participation, visit:
TxDOT Small Business Enterprise Program

Who received the Save the Date for the 2025 DBE Compliance Training/Conference?
The Save the Date notice for the 2025 DBE Compliance Conference was sent by presenter, Ms. Tonya Shaw of Civil Rights to District DBE Coordinators and Directors of Construction (DOCs). If you did not receive it directly, please check with your supervisor or DOC to confirm whether your district received the communication.

Will the 2025 DBE Compliance Conference be held online or in person?
The 2025 DBE Compliance Conference will be held in person only. There are no plans for a virtual option at this time. Additional details will be shared through official channels as the event approaches. It was sent through to DDC and DOCs.

Some contractors only use ACH (Automated Clearing House) for payments. What documentation is acceptable to verify DBE payments in these cases?
This is not recommended but if a contractor uses ACH instead of physical checks, acceptable documentation for DBE compliance includes:

- ACH transaction confirmation from the bank or payment system
- Bank statement showing the payment to the subcontractor or supplier
- Remittance advice or payment summary that includes:
    - Contractor and payee names
    - Date of payment
    - Amount
    - Description or invoice reference

The documentation must clearly show that the DBE subcontractor received and controlled the payment, especially in joint check scenarios. If there is any uncertainty, contact the Civil Rights Division for guidance.

What should be done if a red flag is identified in a joint check arrangement?
If you observe a red flag in a joint check arrangement, such as open-ended agreements, repeated use, or signs that the DBE is not independently managing the transaction, you should:

- Pause the approval process for the joint check.
- Request additional documentation to verify that the DBE subcontractor:
  - Selected the supplier
  - Negotiated pricing
  - Is responsible for ordering and installing the materials
- Notify your Civil Rights contact or compliance officer.
- Document the concern in the project file and escalate if needed.

Red flags may indicate that the DBE is not performing a commercially useful function, which could jeopardize DBE credit for the project.

CST Training and Development updates

Do CEI Recordkeepers have access to the "Intro to APCM" training (CON514)?
CON514 is not available to CEIs at this time, because it is through TxDOT's internal training system (ELM). However, training materials will be made available later this year on the APCM resource page.
🔗 https://www.txdot.gov/business/resources/apcm.html

Will CEIs have access to other APCM training?
Yes. CEIs will have access to training resources through the Construction Recordkeeping and Auditing Resources page, and APCM-specific training will be added to the APCM resource page as it becomes available.
CEIs have access to the resources here:
🔗 https://www.txdot.gov/business/road-bridge-maintenance/contract-administration/construction-recordkeeping-and-auditing-resources.html and training for APCM will be included on the following page in the near future:
🔗 https://www.txdot.gov/business/resources/apcm.html

Will key dates and checklist events still be required in the new APCM system?
Yes, there will be requirements to document the same. Key dates and checklist events will still be required in APCM, just as they are now some will be defaulted, while others will need to be manually added depending on the project.

Will dates marked as "obsolete" in current guidance still be available for entry in APCM, as they are in SiteManager (e.g., the estimated completion date)?
The expectation is that APCM will reflect existing guidance, including continued access to dates currently marked as "obsolete" in SiteManager.

Why are some checklist events defaulted and others not (e.g., Performance Interim Evaluations)?
Checklist events like Performance Interim Evaluations are not defaulted because they are project-specific and may not apply to every contract. Users will need to add them manually when applicable.

Can you provide a list of the most frequently used checklist events and key dates?
The guidance is the list provided because the required events and dates vary or dependent on project. The SiteManager Checklist Events and Key Dates Guidance Document outlines the most commonly used entries and should be used as the primary reference.

Where can we find Checklist Events reports?
https://crossroads/divisions/cst/cmisd/sitemanager.html, under Reports, then you can utilize the Category column to display Checklist Events, and you will see both the report by District and a report by CSJ option.

Can CEIs (external contracted employees) be added to the ConstructionRecordKeeper-Auditors@txdot.gov email distribution list?
No. Microsoft Outlook distribution lists and MS 365 Groups are restricted to for system security reasons. These lists or groups can be created only for the same email domain, as in @txdot.gov domain. CEIs are encouraged to regularly check the external Construction Recordkeeping and Auditing Resources page for updates and new resources, where they can subscribe for updates.

CST DIV Support's updates

When will the updated forms be available?
All forms are currently available on the CST Support page. To access them:
1. Download the file from the top-right menu bar.
2. Open it in Adobe Reader (not in-browser) for best functionality.

Can CEIs add folders in ProjectWise?
The CEIs do not have permissions to create folders in ProjectWise. Folder creation and file deletion are restricted to specific user roles. If a folder is needed (e.g., for environmental documents), contact your District Construction Office to request its addition.

Are we required to follow the file naming structure in ProjectWise exactly as shown in the Project File Index?
The naming structure is the current CST recommendation but not required. A workgroup is being considered to establish a standardized naming convention in the future.

For documents uploaded to ProjectWise, can the hard copies be destroyed?
Yes. ProjectWise is the official repository for construction project records. Once documents are uploaded, you may destroy hard copies, except for Form 599s and contractor evaluations, which must be retained in hard copy as part of contract requirements.

Is there a template available for Substantial Completion?
Currently, there is no standard template for Substantial Completion. CST can work on developing a template for one in the future.

Will we be able to ever add folders into PW or ever have the ability to delete mistakes out of PW specifically for the project we are working on?
Folder creation and file deletion in ProjectWise are restricted to specific user roles. CEIs and most district users cannot delete files or create new folders outside of designated editable folders. Requests for folder additions should be directed to contact your District Construction Office.

How can we get an Area Office added as an option in ProjectWise?
If your TSC office functions as an Area Office but isn't listed, submit an IT ticket, attention to ProjectWise.

How do we free files in ProjectWise that are checked out by others or by users no longer employed?
To free files:

1. Click the highlighted file.
2. Select all → Right-click → Choose "Free."

If the file is locked by someone no longer with the agency, a Power User or Power Admin can release it. Contact your supervisor, or your District Construction Office for help.

How do you unlock a file that got locked with the lock emblem on a file?
Files become locked when they are checked out and not properly checked back in. District Coordinators or Power Users can unlock (or free) these files. If the user is no longer with the agency, a Power Admin can release the lock.

Where can I find the subcontract checklist?
The subcontract checklist is available under Construction Division Forms on the CST Support page, Under Construction Division Forms.

Will the recordings of these sessions be available?
The Annual RK meeting slides and our Q&As are posted to the Record Keeper Development Program webpage on Crossroads; no recorded session is currently available; all meeting are archived online posted in the same area, please keep in mind the answers are only as valid as the date of the meeting with regards to our current year CCAM and policy at that time.

Questions were collected during Annual Meeting sessions, and answers were provided by the Construction Division's Training and Development and Construction Support Section personnel in addition to the guest Divisions that provided briefings for the 2025 Agenda.