Vendor Contact
A TxDOT CCIS Job Aid

Who?

Vendor Contact Users

A Vendor Contact, also known as a Web User, is an individual assigned by the consulting firm to manage the firms Precertification & PTC form records.

What?

CCIS

Consultant Certification Information System (CCIS) is system administered by Texas Department of Transportation to manage precertifications and complete Project Team Composition.

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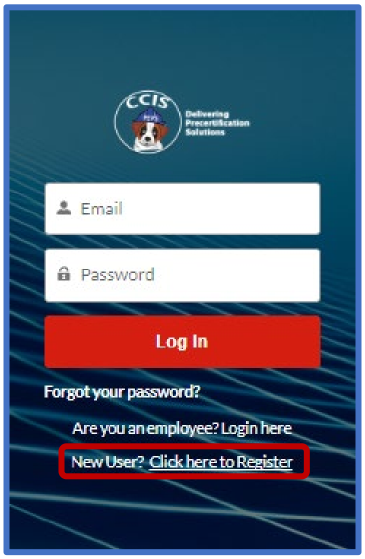
Purpose

The purpose of this Job Aid is to provide guidance to consulting firms and their Vendor Contacts on navigating the CCIS system. This includes managing the firms' information, employees, precertifications, and Project Team Composition (PTC) forms.

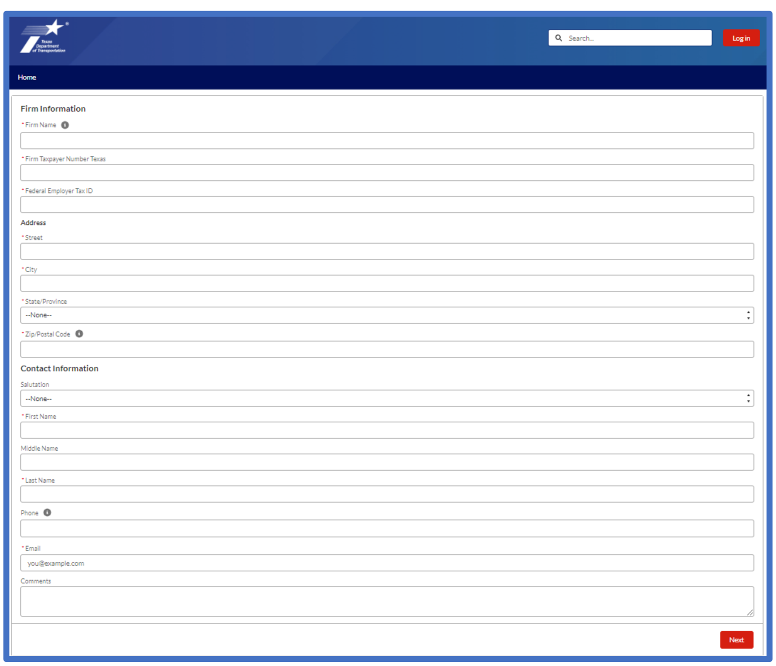
Initial CCIS Community Access Request

New firms should follow these steps to create a new firm account. If you are needing access to an existing firm, please navigate to the Vendor Contact Request Submission section of this Job Aid.

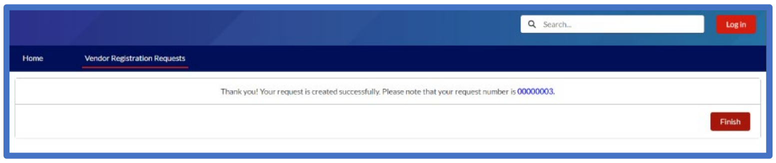
1. Navigate to the CCIS login screen.
2. Select **New User? Click here to Register.**



3. Complete all fields in the form. The fields with an asterisk (*) next to them are mandatory to move forward.
4. After completing the fields select **Next** on the bottom right corner.



5. This message will generate: *Thank you! Your request is created successfully. Please note that your request number is 00000XXX.* Select **Finish.**

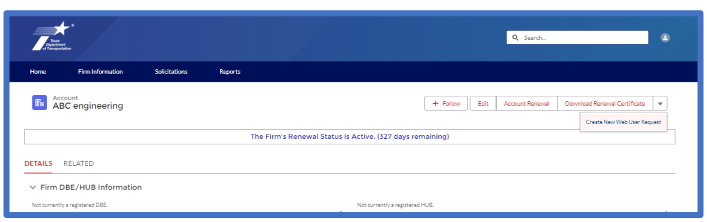


6. Your request is entered into a queue for approval by the Precertification Manager. Once your Vendor Account request has been approved, you will receive an email with your credentials to log into the system.
7. The email will contain a link for a password reset. Click the link in the email to set up a new password.
8. You now have access to the CCIS community and your Firm's Account.

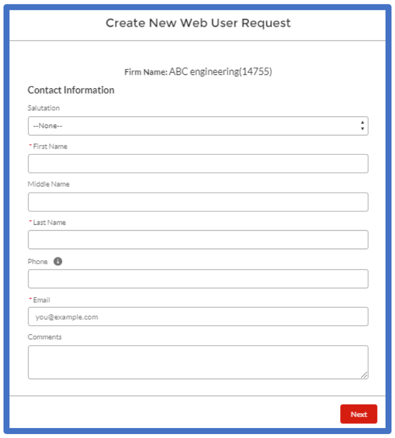
Vendor Contact Request Submission

An existing registered web user from the firm should follow these instructions to request CCIS access for a new vendor contact for the same firm. Each web user should have their own login credentials, and *they should not be shared between users*.

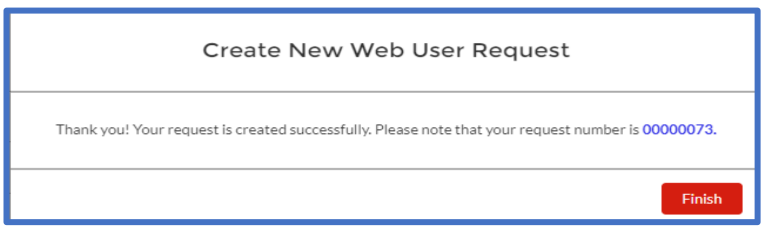
1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. On the top right corner of the Account page, select the down arrow, and then **Create a New Web User Request.**



5. Complete all fields in the form and select **Next.** The fields with an asterisk (*) next to them are mandatory to move forward.



6. This message will generate: *'Thank you! Your request is created successfully. Please note that your request number is 00000XXX.'* Select **Finish**.

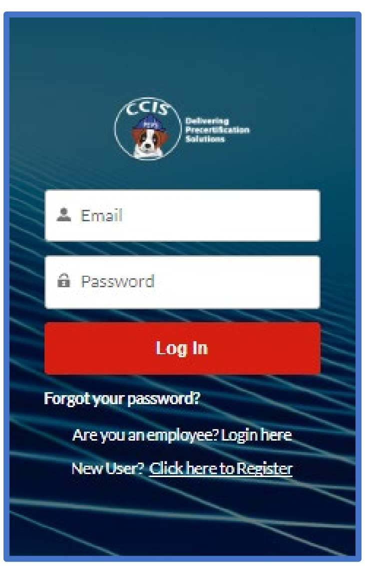


7. If *accepted,* the new user will receive an email with log in credentials.
8. If *declined,* the user who created the request will receive an email notification with a reason for denial.

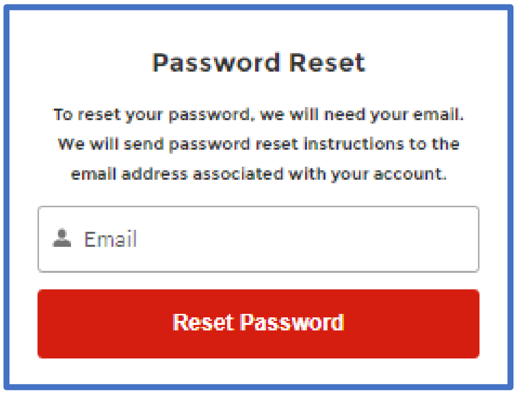
Password Reset for Vendor Contacts

Follow these instructions to reset your CCIS Password.

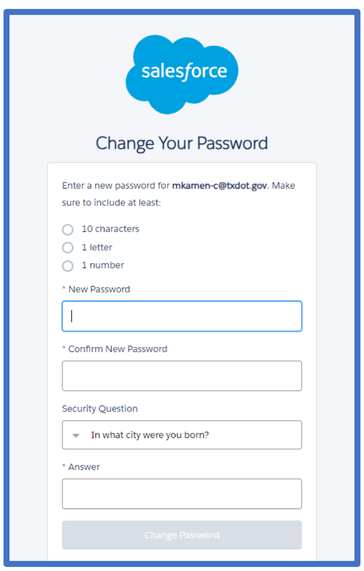
1. Navigate to the login screen for CCIS.



2. Select **Forgot your password?**
3. Enter the email address you used to register in CCIS and select **Reset Password.**



4. You will receive an email containing a link to reset your password.
5. Click the link in the email, and create a new password for your CCIS Community Page login.
6. Enter your new password twice. Your password must include:
   - 10 characters
   - 1 letter
   - 1 number



7. Select **Change Password.**

Updating Firm Information

Follow these instructions to update your firm information.

1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. On the **Details** tab you can **edit** the following:
    - DBE & HUB status
    - Firm CEO name
    - Personnel Totals
5. On the **Details** tab, these items are not editable by you. If any of these items require updating, please email the Precertification Manager, PEPS_CCIS_Precert@TxDOT.gov.
    - Account Name
    - Federal Emp Tax ID
    - Firm Taxpayer Number Texas
    - Administratively Qualified Data
    - Administratively Qualified Expiry Date.
6. On the **Related** tab you will find the following sections.
    - Vendor Contacts
    - Employees
    - Firm Branches
    - Previous Vendor Names – *please do not edit these fields. We are currently working to have this edit option disabled. If you have a firm name change, please email the Precertification Manager, PEPS_CCIS_Precert@TxDOT.gov.*
    - Equipment
    - Precertifications

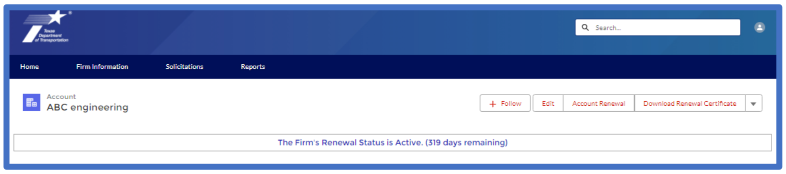
Completing Firm Renewal

Follow these instructions to complete your firms' Account Renewal. All Account information needs to be renewed by March 31st every year. As a reminder, Vendor Contacts will receive an email reminding them to renew at the following times.

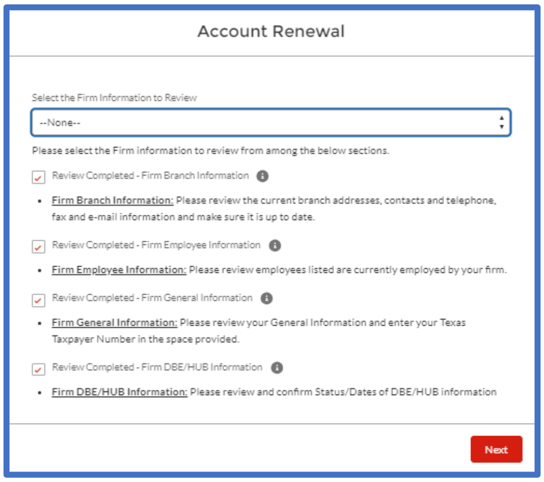
- First week in January
- First week in March
- On April 1st notifying them that their Account is now inactive.

1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).

4. Select **Account Renewal** at the top right corner of the Firm's **Account** screen.

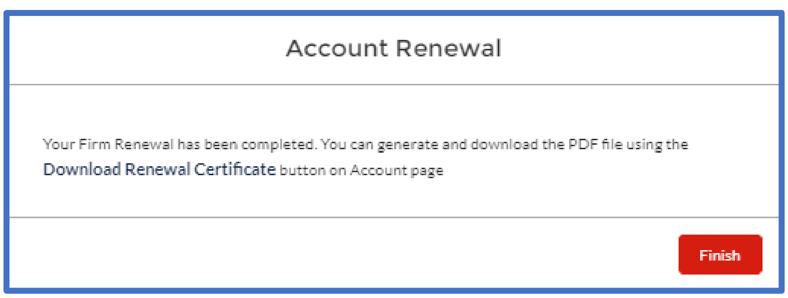


5. Select each item from the dropdown menu and update as needed. As you go through each section the fields will auto-populate with a checkbox. After all fields are checked, select **Next.**



6. You will receive the confirmation message: *Your firm Renewal has been completed. You can generate and download the PDF file using the Download Renewal Certificate button on Account page*.

7. Select **Finish** to complete your renewal.



Download a Renewal Certificate

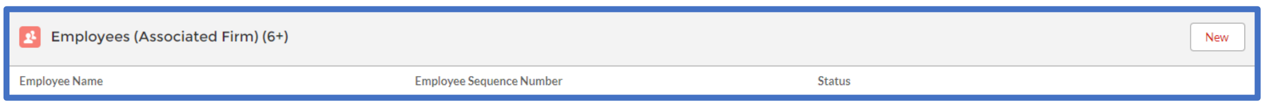
Follow these instructions to download your firm's renewal certificate.

1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. At the top right corner of the firms' **Account** screen, select **Download Renewal Certificate.**
5. The file will generate, and you have the option to download or print.

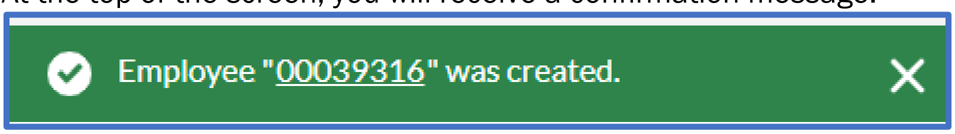
Creating a new employee

Follow these instructions to create a new employee record in CCIS. Before following these instructions, please confirm with the new employee and the Precertification Manager that the employee has no previous history in CCIS with another firm. If an employee has previous precertifications that need to be transferred, please skip to Transfer Employee Record section.

1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. Select the **Related** tab on your firms' Account screen.
5. Navigate to the **Employees (Associated Firm)** section, and select **New** at the top right corner of this section.



6. Enter all required fields, and select **Save.**
7. At the top of the screen, you will receive a confirmation message:



8. You will now find the employee listed in your **Employees (Associated Firm).**

Transfer Employee Record

Follow these instructions to transfer employee precertifications to your firm.

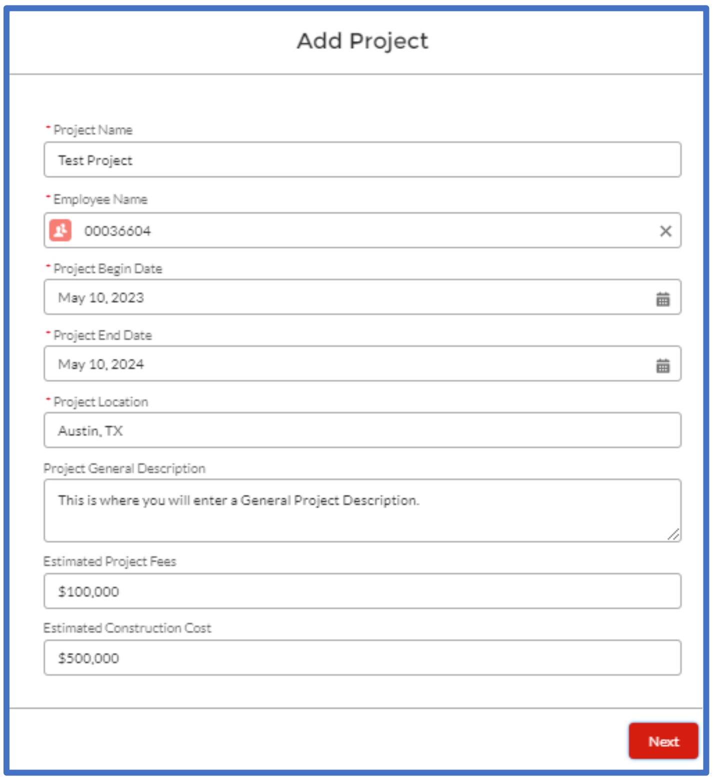
1. Send an e-mail to PEPS_CCIS_Precert@TxDOT.gov to request the transfer of the employee's record to your firm.
2. The Precertification Manager will confirm within 2-3 business days to confirm the transfer or request additional details, if needed.

Adding Employee Projects

Follow these steps for each project record you need to create for each employee. Before proceeding with this section, please be sure you have your employee's completed **Precertification Application Form.** This can be found on the txdot.gov Become precertified webpage under the **Prepare your application** section**.**

1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. Select the **Related** tab on your firms' Account screen.
5. Navigate to the **Employees (Associated Firm)** section, and select the employee you are working on.

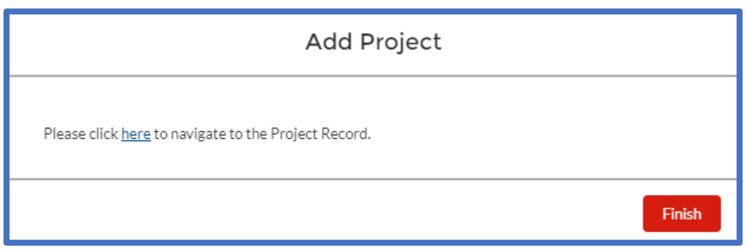
6. Select the **Related** tab on the **Employee Record** screen.
    - At the bottom of this screen, you will find the **Projects** already entered for this employee, if any.
7. At the top right corner of the screen, select **Add Project** to add a new project record for this employee.
8. Enter the required information in all fields**.**
    - **Important Note:** The Project General Description should be populated with a general description of the project. You will enter the specific work performed by the applicant in an upcoming screen.



9. Select **Next.**
10. Select at least one group and work category for which you would like this project to be considered.

11. In the **Description of Work Category,** enter the detailed description of the work performed by the employee as it relates specifically to this work category. The information entered here is what is reviewed by the Review Officer for approval.
    - It is important that you are entering the details from the perspective of the employee.
    - This should be entered in first person format, using terms such as 'I performed,' 'I designed,' 'I managed,' etc.

12. You may check the box to **Add More Work Categories** and follow steps 10-11 above.
13. Once you are done adding work categories, select **Next.**
14. To view the completed project record, select **Here** on the pop-up window, or select **Finish** and find the project listed in the **Projects** section at the bottom of the screen.



15. To view the associated work categories, select **Related** in the project record.
16. To add a new work category to this project, select **New.**
17. Follow steps 10-11 in the Adding Employee Projects section, and select **Save.**

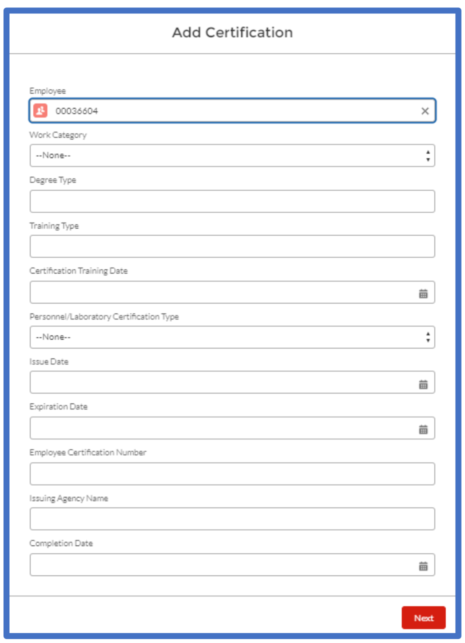
Adding Employee Certifications

Follow these steps for each project record you need to create for each employee. Certifications include training courses required for a work category, licenses, educational degrees, etc. Before proceeding with this section, please be sure you have your employee's completed **Precertification Application Form.** This can be found on the txdot.gov Become precertified webpage under **Prepare your application.**

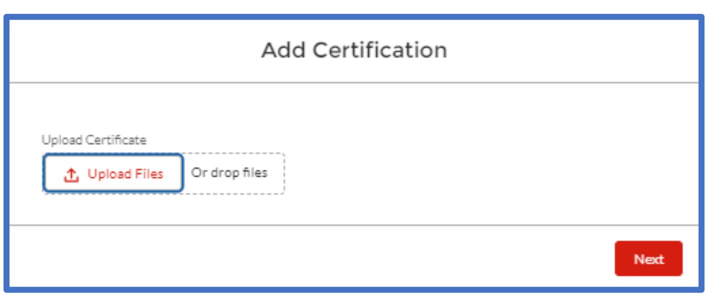
1. Login to CCIS.
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. Select the **Related** tab on your firms' Account screen.

5. Navigate to the **Employees (Associated Firm)** section, and select the employee you are working on.
6. Select the **Related** tab on the **Employee Record** screen.
    - At the top of this screen, you will find the **Certifications** already entered for this employee, if any.
7. At the top right corner of the screen, select the down arrow and **Add Certification** to add a new certification record for this employee

8. Enter required information in all fields, and select **Next.**



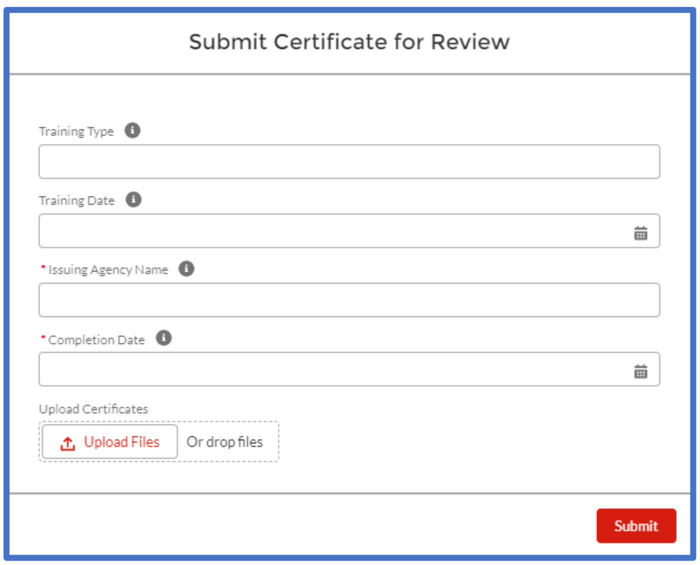
9. Upload certification documents, if applicable, and select **Next.**



Submitting Renewal Certificates – ONLY for Work Categories 3.7.1 & 4.7.1

Follow these steps for submitting renewal certificates for work categories 3.7.1 & 4.7.1. This should be completed every 5 years for each training requirement. Typical review processing time is 10 business days.

1. [Login to CCIS](#).
2. Select the **Firm Information** tab at the top of the screen.
3. Select your Account name (your firm's name).
4. Select the **Related** tab on your firms' Account screen.
5. Navigate to the **Employees (Associated Firm)** section, and select the employee you are working on.
6. Select the **Related** tab on the **Employee Record** screen.
7. Select the certification record previously created for the same course you are updating.
8. At the top right corner of the **Certification** screen, select **Submit Certificate for Review.**
9. Complete all required fields.



10. Upload a copy of the certificate of completion.
11. Select **Submit** to place this certificate in queue for review and approval by the Review Officer.

Adding Employee Precertifications (Work Categories)

Follow these steps for each work category you are seeking approval for the employee. Before proceeding with this section, please be sure you have your employee's completed **Precertification Application Form.** This can be found on the txdot.gov [Become precertified](#) webpage under the **Prepare your application** section**.** Typical review processing time is 21 days; however, Review Officers must be allowed at least 60 days for review.

1. [Login to CCIS](#).
2. Select the **Firm Information** tab at the top of the screen.

3. Select your Account name (your firm's name).
4. Select the **Related** tab on your firms' Account screen.
5. Navigate to the **Employees (Associated Firm)** section, and select the employee you are working on.
6. Select the **Related** tab on the **Employee Record** screen.
    - Toward the middle of the screen, you will find the **Precertifications** already entered for this employee, if any.
7. At the top right corner of the screen, select **Add Precertification** to add a new work category.
8. Select the **Group** and **Work Category** you would like to add for this employee.

9. Select **Next** to create the record.
10. Select the **Link to created record**.

11. This opens the **Precertification Record** screen.
12. Once you are ready to submit this request for review, select **Submit for Approval** at the top right corner of this **Precertification Record** screen.
    - Before submitting, be sure you have entered all applicable projects and certifications associated with this work category.

Requesting Additional Details on a Denied Application

Follow these instructions to request additional details on a denied application. To protect the integrity of the precertification review process, the identity of the subject matter experts (Review Officers) is not shared. The Precertification Manager bridges the gap in case any questions arise.

1. Send an e-mail to PEPS_CCIS_Precert@TxDOT.gov to request the additional details on a denial.

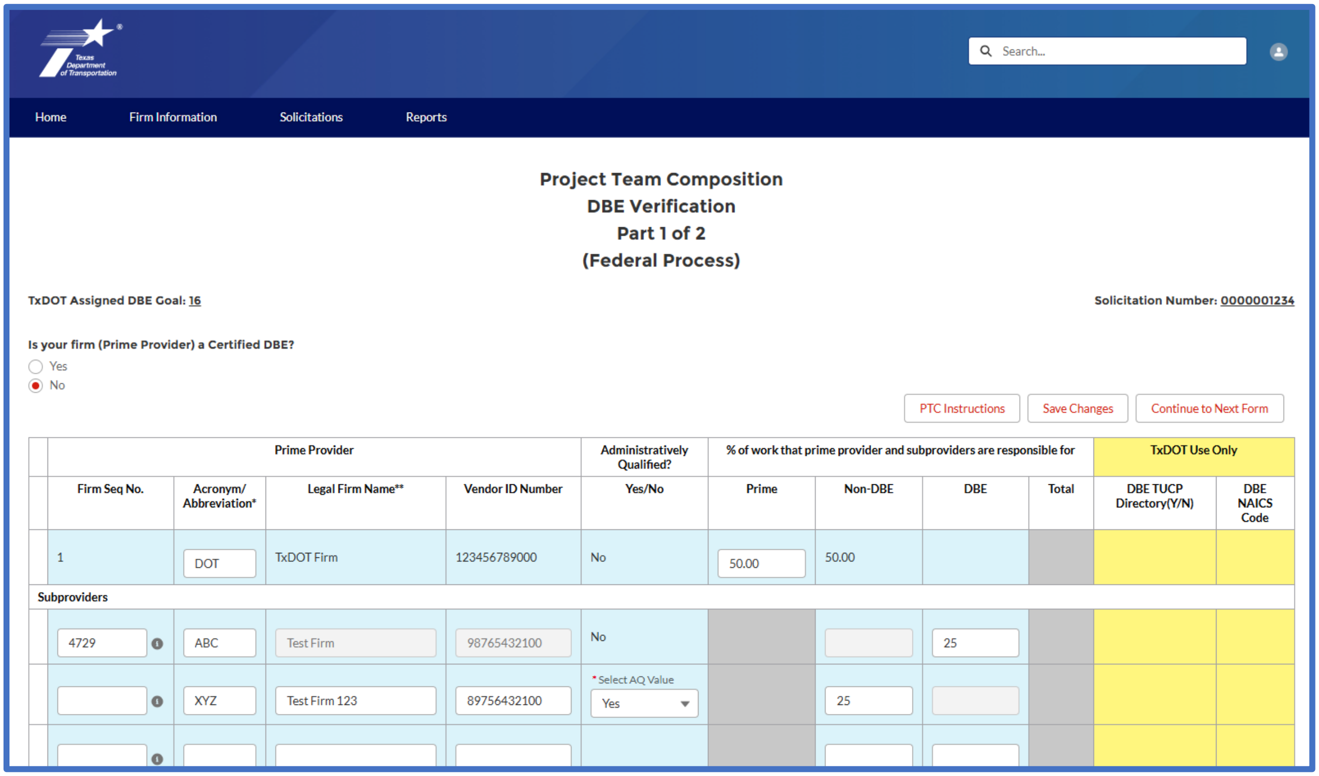
2. The Precertification Manager will reach out to the Review Officer and respond back to your e-mail within 5 business days with the response from the Review Officer.

Project Team Composition (PTC) Form

Follow these instructions to complete a PTC Form.

1. Login to CCIS.
2. Select the **Solicitations** tab at the top of the screen.
3. Select **Create or Edit PTC** to begin editing the PTC form.
4. After reading through the PTC Instructions pop-up page, select **OK.** You may refer to these instructions later by selecting **PTC Instructions** at the top right corner.
5. On part 1 of the PTC form, the following fields are auto-populated fields based on the information from your **Firm Information.**
    - DBE/HUB status – if this field is populating incorrectly, navigate to the **Firm Information** tab, and follow the instructions from the Updating Firm Information section of this job aid to make any necessary updates. After you save changes in **Firm Information**, navigate back to the **Solicitations** tab, and open the PTC Form. The DBE/HUB status should auto-populate according to the changes.
    - Legal Firm Name – if this field is populating incorrectly, send an e-mail to the Precertification Manager PEPS_CCIS_Precert@TxDOT.gov.
    - Vendor ID Number – if this field is populating incorrectly, send an e-mail to the Precertification Manager PEPS_CCIS_Precert@TxDOT.gov.
6. Enter your firm's **Acronym/Abbreviation** and **Prime Percentage.**
7. In the subsequent section for **Subproviders**, enter the following information for each provider.
    - Firm Sequence Number – if the subprovider is not registered in CCIS, skip to step 8.
    - Acronym/Abbreviation
    - Administratively Qualified (AQ) status – for a Non-Federal procurement, if the AQ value is **No**, then select one of the following options from the dropdown menu:
        - Non-E&D Service
        - No-Accept TxDOT Rate
        - No-Exempt
    - Percentage

8. Enter the following information for each provider that is not registered in CCIS.
    - Acronym/Abbreviation
    - Legal Firm Name
    - Vendor ID Number
    - AQ status
    - Percentage


Home Firm Information Solicitations Reports

Project Team Composition
DBE Verification
Part 1 of 2
(Federal Process)

TxDOT Assigned DBE Goal: 16

Solicitation Number: 0000001234

Is your firm (Prime Provider) a Certified DBE?
Yes
No

PTC Instructions | Save Changes | Continue to Next Form

	Prime Provider				Administratively Qualified?	% of work that prime provider and subproviders are responsible for				TxDOT Use Only	
	Firm Seq No.	Acronym/ Abbreviation*	Legal Firm Name**	Vendor ID Number	Yes/No	Prime	Non-DBE	DBE	Total	DBE TUCP Directory(Y/N)	DBE NAICS Code
	1	DOT	TxDOT Firm	123456789000	No	50.00	50.00				
Subproviders											
	4729	ABC	Test Firm	98765432100	No			25			
		XYZ	Test Firm 123	89756432100	* Select AQ Value Yes		25				

9. After you have completed Part 1 of the PTC form, select **Save Changes.**
10. Select **Continue to Next Form** to move on to Part 2.
11. Work Categories are listed in each row. For each Work Category, select the Firm/Task Leader that you are proposing for the procurement.
12. For each Work Category, enter the percentages as you plan to divide amongst Prime and Subproviders.
    - If you are planning to assign a percentage of an Engineering and Design (E&D) related service to a firm that is not Administratively Qualified (as indicated in Part 1), then you will be prompted to provide an explanation.
        - **Important Note**: on a Federal Procurement, the prime and subproviders are required to be Administratively Qualified to perform any E&D related service.
13. After you have completed part 2 and your total Work Category percentage equals 100%, select **Save Changes.**
14. Select **Complete** to initiate a validation check. The CCIS system will validate the following information:

- Total percentages have been met for each Work Category.
- Total Work Category percentage distributed equals 100%.
- Validated HUB or DBE goals have been met.
    - If the goal has not been met, a pop-up window appears where you will be prompted to provide an explanation.

Project Team Composition
Task Leader Precertification & Firm Percentage by Work Category
Part 2 of 2
(Federal Process)

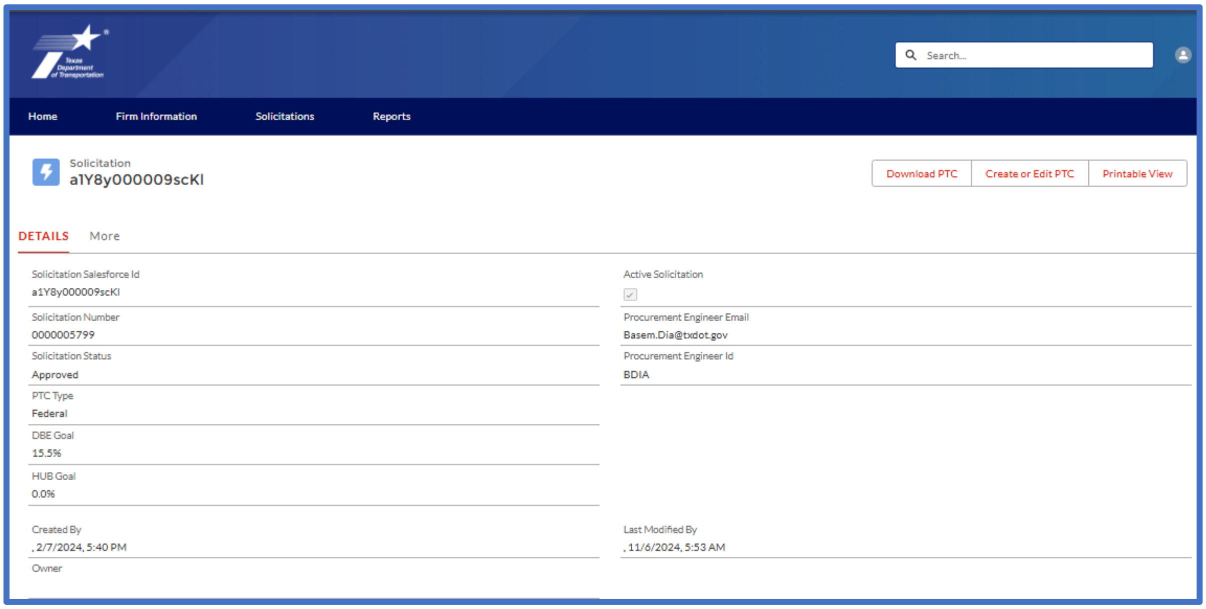
Solicitation Number: 0000001234

PTC Instructions | Back To Part 1 | Save Changes

Work Category No.	Category Name	Percentage Advertised	% Total	E&D Related Services	Firm Name	Number of Precertified Employees	Task Leader	CON	ABC	XYZ
1.8.1	Public Involvement	10.00%	%	N	Select Firm					
11.3.1	Construction Superintendent	10.00%	%	N	Select Firm					
11.10.1	Construction Record Keeper	10.00%	%	N	Select Firm					
12.1.1	Asphaltic Concrete Production	10.00%	%	N	Select Firm					
12.1.2	Portland Cement Concrete	10.00%	%	N	Select Firm					
12.1.3	Materials Engineering	10.00%	%	Y	Select Firm					
12.2.1	Concrete Plant Inspection and Testing	10.00%	%	Y	Select Firm					
12.2.5	Hot Mix Asphalt (HMA) Plant Inspection and Testing	10.00%	%	Y	Select Firm					
12.4.1	Pavement Design Services	10.00%	%	Y	Select Firm					
14.1.1	Soil Exploration	10.00%	%	Y	Select Firm					
Work Category No.	Category Name	Percentage Advertised	% Total	E&D Related Services	Firm Name	Number of Precertified Employees	Task Leader	CON	ABC	XYZ
Total		100.00%	0%					%	%	%
% of work that prime provider and subproviders are responsible for								50%	25%	25%

15. After completing the PTC form, select the **Solicitations** tab, and select the solicitation you are working on.

16. Select **Download PTC** to generate a PDF file of the PTC form you have just completed.



17. Complete your internal quality review check and upload the completed PTC Form to Bonfire with the rest of your proposal.