PEPS Fireside Chat Question & Answer Summary

CCIS Roll Out – February 2024

Q1: What if you had submitted precertifications for an employee for approval in the old system and they had not yet been approved/disapproved before Feb 1?

A1: If a precertification was submitted for review prior to Feb. 1, it should have been migrated to the new system. Please check the employee related information to look for those precertification items. If status shows "draft", please click "submit for approval".

Q2: What are some reasons that access request would be denied?

A2: An access request might be denied if the information submitted in the request was incomplete or if there was an obvious error (like a phone number being too short).

Q3: I will be accessing the new CCIS to register a new firm. My firm is a sole proprietorship. Is CCIS set up to accept a sole proprietor as the firm name?

A3: It should accept a sole proprietorship as the firm name.

Q4: If we have offices in nine states, do we need to list those in Branches, or only our Texas offices and HQ?

A4: If your firm has branches in other states that include precertified employees or if the branch assists with work on TxDOT contracts, you might want to list the branch information, so the branches can receive communications from TxDOT. The firm isn't required to list every branch, but you should use your discretion to decide if the branch needs to be listed in the system.

Q5: Is there a limit to the number of branches that can be listed?

A5: There is no limit to the number of branches that can be listed.

Q6: Are the active users in the new system the same as the current users in the old system?

A6: People who had access to the old system should be users in the new system. Watch for a "welcome" email that provides your new login credentials.

Q7: Is equipment entered per branch? Would be unwieldy for a large firm with offices across the country and beyond. If the equipment is listed for entire firm, that is.

A7: The equipment should be listed for the firm in general. Basically, you should show the type of equipment that is necessary to perform the work for which you're precertified and a rough count to show order of magnitude (small firms might have 20 engineering workstations for performing engineering work, while larger firms might have 200).

Q8: Please consider extending the 60 days to have to change a password. Thanks.

A8: The 60-day limit is related to best practices for ensuring system security and information security. TxDOT does not intend to extend the password reset time.

Q9: Will the data migration not include all the firm information that's already associated with our firm?

A9: All of the information that is in the legacy CCIS system will be migrated to the new system. When you login, please take a moment to review this information and make any necessary updates or changes.

Q10: Can you leave Employee Personnel Number blank?

A10: The employee personnel number is not a required field, so you may leave it blank.

Q11: Can you add multiple precertification categories for an individual at one time?

A11: Yes. You may add multiple precertifications at the same time. In addition, when you are editing an employee's project information, you may add multiple work categories to that project.

Q12: Will the certificates be migrated into the new system or will we need to upload them? This is for employees that we have already mailed in the certifications to PEPS.

A12: The old mainframe CCIS system did not store the training certificates in the system, so those were not migrated into the new system. For employees that have previously submitted training certificates, you may create a certification in CCIS for each required training course and then upload those certificates. Refer to the guidance for how to enter employee's personal certifications into CCIS, which can be found at: https://www.txdot.gov/content/dam/docs/business/peps/precert/ccis-enter-personal-certification-guide.pdf
Refer to the guidance for submitting training certificates, which can be found at: https://www.txdot.gov/content/dam/docs/business/peps/precert/precert-training-cert-submittal.pdf

Q13: Who will be notified when a certificate expires - the user entering the information or will it be the employee?

A13: The CCIS system doesn't include email addresses for precertified employees, so the notification of training expirations would be sent to the firm's personnel that have access to the system (referred to as firm contacts).

Q14: Will we need to update TX PE licenses annually for all licensed employees?

A14: As with the legacy system, you are not required to update the license or registration expiration dates for every person every year. However, if an employee is applying for precertification in a new work category, you should review and update the license or registration expiration data when you are updating the other certification and project information.

Q15: Will we be able to print a copy of the slides after the presentation?

A15: The presentation slides have been posted at: https://www.txdot.gov/content/dam/docs/business/peps/fireside-chats/2024-02-02-presentation.pdf

Q16: Is there a limit on projects to provide for employee qualification? The limit in the previous portal was 15 projects maximum.

A16: In the new system, you may use as many projects as necessary to demonstrate your experience. In addition, the new system does not have character limitations for the description of the project or the description of work done in the category.

Q17: If you worked on two different projects that apply to two different work categories in the same time frame, how do you differentiate how much time should be allocated to

each of the two?

A17: The review officers are subject matter experts in their assigned work categories. The review officers use their personal knowledge and experience with the work in the categories to determine a reasonable amount of the time to apportion to each category.

Q18: Can multiple categories from different groups be entered on the same precertification submittal, or should they be submitted separately by group?

A18: Yes. For example, if a single project demonstrates experience performing hydrology and hydraulics work and bridge design work, then you may associate multiple work categories from Group 10 and group 5 with that project. Make sure that for each category associated with a project, you include a description of the work performed in that category. In addition, for each one of the work categories associated with an employee's projects, you will create a precertification request and submit each precertification for approval. (ex. if your projects have 5 associated work categories, you will have five separate precertifications that will need to be submitted for approval.

Q19: Is submitting precertification for more than one employee... do all approvals have to be done before submitting a group again?

A19: If multiple precertifications are submitted for one employee but not all have been approved/denied yet, it is recommended that you don't start updating the application information until you have results for all precertifications. You don't want to accidentally remove or overwrite project information to address one review officer's denial comments only to find that you've changed or overwritten information that a review officer might have needed for their review. However, if the comment is related to not enough years of experience, you could simply add a new project associated with that category and resubmit the precertification for that category.

Q20: If a precertification is denied, can we update and resubmit that precertification, or do we have to create a new precertification record?

A20: You should be able to update the project and certification information and resubmit the precertification.

Q21: The Texas Board of Professional Engineers allows an engineer to be associated with two firms (one FT and one PT). Does CCIS allow an individual to be associated with more than one firm?

A21: CCIS only allows an employee to be associated with one firm at a time.

Q22: Is the precertification application limited to one group and work category?

A22: Each precertification item is for a single work category. However, multiple precertifications may be submitted for an employee.

Q23: For large firm, with the previous portal, it only allowed 10 branch offices and headquarters. Is there a limit of offices on the new system, or is it unlimited?

A23: In the CCIS system, you may enter as many branches as needed for your firm, but you are not required to list every branch.

Q24: Would you mind repeating the time frame and working on two projects at the same time requirement?

A24: When entering projects, if the project timeframes overlap, the overlapping time period doesn't count twice. For example, if project A was 1/1/2020 through 6/30/2021 (18 months) and project B was from 1/1/2021 through 12/31/2021 (12 months), then the total amount of time would be computed as 18 + 12 – 6 = 24 months because of the six-month overlap between the projects.

Q25: For a large firm, is it required to enter ALL branches, or can you limit the branches to only those who do work for TxDOT?

A25: In the CCIS system, you may enter as many branches as needed for your firm, but you are not required to list every branch.

Q26: For us who have been certified previously do we need to start all over with the process?

A26: If an employee was precertified prior to February 1, 2024, those precertification records will be migrated to the new system and the employee will still be considered precertified. There is no need to reapply.

Q27: Does the PTC form pull HUB/DBE info?

A27: It does not pull HUB/DBE information for subproviders, so you will need to show the firm's percentage of work in the correct column depending on whether it is a HUB/DBE or not. TxDOT still has to manually validate HUB/DBE information shown on the PTC form against the data from the CMBL since TxDOT is not the official source for verification of HUB/DBE information.

Q28: Will we be able to edit and save and return to the PTC form or is just one go?

A28: Yes. You may save the PTC form at any time and then open the form later to continue working on it. After you have entered all of the information and saved it, you can click on "Complete". This will initiate a validation process that verifies that the totals add up to 100 % and requires a comment to be entered if the HUB/DBE goal was not met. Once the form has been successfully completed, you can download a PDF copy of the form. This PDF copy of the form must be uploaded into the Bonfire system along with all the other proposal package documents. Hitting the "Complete" button does not lock the form. If necessary, you may open the PTC form and make additional changes up to the closing of the solicitation. <u>Just remember to allow time to create the PDF file and upload it to Bonfire before the closing date and time.</u>

Q29: For the vendor ID # the system adds additional numbers. Where do we get these numbers?

A29: Please use only the first 11 digits of the Centralized Master Bidders List (CMBL) number as your vendor ID.

Q30: For firms that are not precertified, will we be able to type in their vendor ID number? It looks to be blanked out in your screenshot.

A30: If a firm is not precertified, leave the firm sequence number blank and manually enter the legal firm name and the vendor ID number.

Q31: The CMBL number typically has 00s. Will those be auto-populated, or are the 00s not required anymore? Also, will it auto-pop the Tax ID if the company has no CMBL number?

A31: Please use only the first 11 digits of the CMBL number. On the PTC form, the firm's Tax

ID that is shown in CCIS will auto-populate when the firm sequence number is entered.

Q32: What if the sub is not NAICS certified in one of the categories, can they then be in both columns DBE and non-DBE?

A32: The new PTC form only allows you to enter a percentage in one column for a firm.

Q33: We have been told that CST members do NOT see the PTC form (it is really only for PEPS to confirm that the team has all the required work categories covered and precertifications, admin quals, etc. are up to date). Is this still the case?

A33: Yes. The PTC form is used by PEPS and it is not included in the scoring by the consultant selection team (CST).

Q34: So now, all firms in a category have to be pre-certified? That is different from before.

A34: Refer to the task leader requirements stated in the requests for proposals. The task leader for each work category must be precertified in that work category and the firm providing the task leader must have active precertification status.

Q35: One of our IT staff wanted to ask if the CCIS has an API that would allow us to auto download the precert staff programmatically on a scheduled basis?

A35: No, it does not.

Q36: Is there a plan to have the PTC and HSP share data?

A36: The HSP is a form created and maintained by the Texas Comptroller's office. There is no plan to share data between the PTC form and the HSP.

Q37: So all CCIS contributors will be able to collaborate on the PTC form, correct?

A37: If there are multiple users within the same firm that have access to new CCIS, those users would all be able to access the PTC form as it is being completed by the firm. Although this may seem convenient, it might lead to confusion if different users are overwriting changes made by someone else. As a result, it might be best to have one designated person who is responsible for doing a thorough quality control check before completing and downloading the form. <u>Remember – the PTC form (in PDF format) must still be uploaded into the Bonfire system along with all the other proposal response documents.</u>

Q38: Will the new CCIS still allow for us to search for Firms by Precert? Additionally, will we be able to generate reports. such as Firm Employees by Precert Categories?

A38: Once the data has been migrated to the new system, TxDOT will develop reports to show data such as firms with active precertification and firms precertified in each category. These resources will be posted on the Become Precertified webpage and a mass email will be sent to all precertified firms when these resources become available.

Q39: When/how will we receive the URL to the new system, or is that on the "How to Become Precertified" page?

A39: The URL for the new system is:
https://txdot.my.site.com/ConsultantCertificationInfoSystem
In addition, there is a blue button shown on the Become Precertified webpage that can be used to navigate to the new system.

Reminder:
If you are a prime provider on existing contracts with TxDOT and you have a Name Change or Contract Assignment, please also reach out to PEPS_SSC_FirmChange@txdot.gov.