Quality Responses – July 2024

Q1: **If a subprovider's legal firm name is slightly different than what auto-populates on the PTC form in the new CCIS system, should we go with what auto-populates in your system? For example, sometimes there are slight variations in punctuation and in which words are spelled out (e.g., Inc. vs. Incorporated).**

A1: Slight variations in punctuation or spelling is not a disqualification; however, a best practice is to make sure the legal name used in all TxDOT systems exactly matches the legal name on the Secretary of State website, including punctuation. You should make sure that the name is correct in CCIS by contacting the PEPS CCIS Precert Administrator at peps_ccis_precert@txdot.gov. The legal firm name should be used in all of our systems and on the documents in the proposal package.

Q2: **HSP form requires the Texas VID or Federal EIN. PTC form requires the EIN. Sometimes the federal EIN number in the PTC has the first number or the last 2 or 3 numbers missing (the 00). Would this prompt a disqualification specially if the PTC does not allow you to input the number to match the HSP number?**

A2: No, this would not be a disqualification. However, the error probably occurred when the firm put the Firm Taxpayer Number Texas in CCIS, which should be the same as the Vendor ID on the PTC form. This should be the same as the first eleven numbers of the Comptrollers CMBL number. Not everyone is on the CMBL. Firms should use this link to apply for a Texas identification number from the Comptroller if they don't already have one: https://comptroller.texas.gov/search/?site=ctg_collection&q=texas+identification+number+%28tin%29+-+texpayment+resource. The State Vendor ID (the first eleven digits of the Comptroller's thirteen-digit Vendor ID) should be used for all of our systems: PS-CAMS, CMBL, PeopleSoft, and CCIS.

The number on the Taxable Entity site comes from the Secretary of State and is not the same number as the State Vendor ID. The Federal

EIN is issued by the federal government and is also not the same as the State Vendor ID number; however, the CMBL number is usually the Federal EIN with some numbers added on each end. If the number in CCIS is not matching other systems, the firm should contact the PEPS Precert Administrator and use the State Vendor ID (first eleven digits of the CMBL) in CCIS.

Q3: **Why are the work categories on the PTC NOT listed in numerical order?**

A3: We are going to do more phases of refining the CCIS system. This will be fixed in future updates.

Q4: **How should the situation be handled when CCIS shows a firm as not administratively qualified on the PTC, but the "Firms that are Administratively Qualified Applicable to Both Federal and State Processes" shows an ending date that is beyond the solicitation submission date?**

A4: This is probably happening for FY2024 Wave 4 due to the AQ renewal deadline of June 30, 2024. CCIS is not picking up the 90-day extension. You can put a note on the PTC form to add a comment, or you can download the form as a PDF and then use the text tool to add a note. We will check every red box on the PTC form and verify the firm's AQ status with the PEPS AQ Group during our screening process.

Q5: **The change to Salesforce has doubled last names or titles like Jr, Sr. Is TxDOT combining this, or is it up to the firm to contact PEPS?**

A5: The person who is precertified in CCIS or who is managing the precertifications for the firm should contact the PEPS Precert Administrator to have the name corrected.

Q6: **In the Key Staff Relevant Experience section, you mentioned not including firm-specific details and just wanting to see what the individual did. Sometimes, we briefly introduce the firm's overarching role on the project in the project descriptions in the key staff section before we introduce the individual's role, especially if it's the first time we've brought up the project in the proposal. Is it okay if we include details about both the firm and the individual, or should we just keep it to the individual's role?**

A6: You may utilize the space in your proposal the best way you see fit. We recommend you clearly outline the PM and Key Staff's relevant experience since that is part of the criteria on which the proposal will be evaluated.

Q7: If a firm is using a DBA, is it ok to use just the DBA name, or do we have to include the full name (i.e. XYZ 123, Inc. dba ABC 9810, LLC) on the proposal?

A7: It is a best practice to use the full legal name on every document in the proposal package. The legal firm name the firm inputs into CCIS will be the name that shows up on the PTC form. You can use just the legal name; however, if you want to include the DBA, you will have to use the full legal name plus DBA as shown in your example. To make a name change for firm name correction in CCIS, contact the PEPS CCIS Precert Administrator at peps_ccis_precert@txdot.gov.

Q8: In the future, will TxDOT not update Salesforce for firms in the AQ renewal process and have a 90-day extension?

A8: No, the 90-day extension is not recognized by Salesforce CCIS and will not be changed in future revisions. The PTC form reflects whether a firm has fully renewed their AQ status prior to the renewal deadline. A best practice is for firms to complete the AQ renewal process well before the renewal due date to avoid needing a 90-day extension.

Q9: Can we get the firm abbreviations in the online PTC to stay at the top of the columns when we scroll down to make it easier to ensure we're putting percentages in the right place?

A9: This may be addressed in a future revision of Salesforce CCIS.

Q10: If TxDOT provides Wave projects identified may us consultants get tentative precertification requirements? Currently we are using similar proposals to predevelop proposals.

A10: All of the precertification requirements for our standard work categories are published on the external PEPS webpage at: Precertification Work Categories (txdot.gov). Individuals may apply for precertification in any category for which they are qualified at any time. The Consultant Selection Team (CST) does not finalize the work categories required for a contract until a few weeks before the start of the wave and then includes them in the Request for Proposals (RFP). This allows the district or division procuring the contract to have

maximum flexibility in procuring a contract that fits the needs of the Department at the time of procurement.

Q11: Is there any chance of the HSP form going digital like the PTC form in the future?

A11: The HSP form is developed and managed by the Texas Comptroller of Public Accounts, not TxDOT. We provide a link to the HSP in the Request for Proposals.

Q12: On the PTC, if the autopopulated vendor ID isn't matching cmbl or taxpayer lookup, how should we proceed? Should we mark up the final PDF?

A12: Yes, add a note to the PTC. However, you should reach out to the PEPS Precert Administrator to correct the number in CCIS. The error probably occurred when the firm put the Firm Taxpayer Number Texas in CCIS, which should be the same as the Vendor ID on the PTC form. See the answer to Question 2 above for further explanation.

Q13: Will the PTC update address the formatting issues with regards to page size and margins? As it is, it's very difficult to print to do QC reviews.

A13: This may be addressed in a future revision of Salesforce CCIS.

Q14: I was hoping to gain some clarification on graphics and diagrams not being scored. Does this include exhibits, drawings, flowcharts, etc. that graphically depict our approach to and experience in providing services for the associated contract? A common comment received in debriefs is for more graphics to break up the text for the CST.

A14: Graphics and diagrams that are pertinent to Proposal Content as outlined in the RFP are a great way to break up the text. It is a best practice that some of the written content refer to the graphics and diagrams in order to clearly convey their value.