Consultant Certification Information System Help Guide

Rev. 06/2014

1 INTRODUCTION

The Consultant Certification Information System (CCIS) Online System was designed to allow a new firm to submit an application for precertification, allow you to update your firm or employee precertification information, to add a new employee to your firm and to generate reports for your firm and employees.

1.1. What You Need to Use the CCIS Online System

⇒ Access to CCIS requires the completion of security Access Form 1980, Form 1828 and the CCIS User Contact Information Sheet. These forms are available on this link:
http://www.txdot.gov/business/contractors_consultants/ccis.htm
Or, you may contact TxDOT's Agency Contact for Precertification below.

⇒ Upon receipt of the three forms, a User ID will be assigned to the employee in your firm whose signature is on the forms and who completes the forms. Send the original completed forms to TxDOT's Agency Contact for Precertification address below.

⇒ The CCIS Online System will not allow you to:

- Delete employees from your firm.
- Change your firm name or employee names.
- Transfer employees from one firm to another.
- View another firm's information.

In order to complete any of the above transactions, or to get help with the CCIS Application or the forms please contact TxDOT's Agency Contact for Precertification. http://www.dot.state.tx.us/des/consultinfo/AgencyContact.htm

Sierra Salinas
PEPS Division Precertification
Administration & Finance
125 E. 11th Street
Austin, Texas 78701-2483
Phone: 512.960.5271
E-mail: Sierra Salinas@txdot.gov

You will need the work categories doc and a Hard Copy of the Application
Work Categories doc: http://www.dot.state.tx.us/des/consultinfo/precattb.htm
Hard Copy: email the above contact for a hard copy.

⇒ There are required fields in the application. Look for the asterisk (*)
* = required field.

⇒ In accordance with TxDOT Administrative Rules regarding precertification and contracting, TxDOT has sixty (60) days to review a precertification application upon receipt of complete and accurate information.

⇒ Your application or update will not be reviewed until you notify CCO by clicking the "SEND NOTIFICATION" button located at the bottom of the Main Menu page.

⇒ There may be times when the CCIS Online System is unavailable due to maintenance. Please be patient.

2 MAIN MENU

2.1 System Navigation Links

In the CCIS Online Application for Precertification, you will not be able to use the Forward and Back buttons. The System Navigation Links and the two menus, Firm Screen Selection and Employee Screen Selection Menus should be used to navigate in the system. The following is a list of the System Navigational links and what they are used for:

Return To Sign-On Screen
This link will direct you back to the system's sign-on screen.

CCIS System Help
This link will give you access to the CCIS User Guide, via a new browser window. It can be viewed while you work in the system.

Log Off
This link will log you off the system and take you to the sign-on screen.

Main Menu
This link will direct you back to the first page of the application where the Send Notification button is located at the bottom of the page.

The Main Menu screen contains two drop-down menus that will allow the option of selecting information for the firm or the employee. Once you make a selection from one of these screens, your firm name and sequence number will automatically appear since this information is tied to each prospective provider sign-on User I.D. and Password. This prevents any other firm from viewing any information but their own.

Firm Renewal
Used to navigate to the Annual Renewal Page

2.2 Firm Screen Selection Menu

This menu lists the following screens which must be completed for your firm:

- Firm General Information
- Firm Previous Name Information
- Firm Branch Information

The following is a Summary Screen for your firm categories. You cannot enter information on this screen. If you have employees precertified, then the categories that they are precertified in will be displayed here.

- ➢ Firm Category of Work Precertification Summary (Display Only)

This menu also lists several reports that can be generated for your firm, if there is information in the system for the reports (See Section 5 for instructions on Reports):

- ✓ Precertification Questionnaire (FIRM ONLY)
- ✓ Precertification Questionnaire (FIRM and all EMPLOYEES)
- ✓ Precertification Questionnaire (all EMPLOYEES only)
- ✓ Precertification Status Report (FIRM ONLY)
- ✓ Precertification Status Report (FIRM and all EMPLOYEES)
- ✓ Precertification Status Report (All EMPLOYEES only)
- ✓ Evaluation Report (FIRM Only)
- ✓ Evaluation Report (FIRM and all EMPLOYEES)
- ✓ Evaluation Report (all EMPLOYEES only)

The Firm Screen Selection Menu also contains the following that can be accessed for Annual Renewal:

- ❖ Firm Renewal

These two screens can be used for annual Renewal and at any time during the year.

- ❖ Firm General DBE/HUB Information
- ❖ Firm Correspondence Information

2.3 Employee Screen Selection Menu

This menu lists the following screens which must be completed for each new employee seeking precertification:

- Add New Employee
- Employee Certification Information
- Employee Category of Work Information
- Employee Previously Completed Project Information

There is also a selection after the Add New Employee selection called

- ➢ CCO-15 Prime Provider Evaluation Form

If there are any evaluations for contracts for your employees in our system, you will be able to view them by making this selection, selecting an employee name and viewing the evaluation.

This menu also lists the following screen selection which is a Summary Screen of the categories that the employee is precertified in. You cannot enter information into this screen, it is Display Only:

- Employee Category of Work Precertification Summary

This menu also lists the following screen selections which are reports that can be generated for your employees (See Section 5 for types of reports and instructions):

- ✓ Precertification Questionnaire (Selected EMPLOYEE only)
- ✓ Precertification Questionnaire (FIRM and Selected EMPLOYEE)
- ✓ Precertification Status Report (Selected EMPLOYEE only)
- ✓ Precertification Status Report (FIRM and Selected EMPLOYEE)
- ✓ Evaluation Report (Selected EMPLOYEE only)
- ✓ Evaluation Report (FIRM and Selected EMPLOYEE)

2.4 Other Links

MESSAGE CENTER
After you click an Add or Update button in the system, you have to return to the top of the page and look at the MESSAGE CENTER. Your input has not been saved until the MESSAGE CENTER says that your information has been updated or added successfully.

If the Message Center does not say updated or added successfully, it will tell you what is wrong with your input, go back, make corrections, click the update or add button again and check the MESSAGE CENTER until it tells you that the information has been added or updated successfully.

All transactions in this system will be displayed in the MESSAGE CENTER.

SELECT A NEW EMPLOYEE (FROM THIS FIRM) button: This button allows you to select a new employee from your firm (takes you to a menu of employee names).

Sign On Screen
Returns you to the sign on screen. A valid User ID and password are required to enter the system.

Error Page
If you encounter any errors, contact TxDOT' Agency Contact for Precertification.
http://www.dot.state.tx.us/des/consultinfo/AgencyContact.htm

3 FIRM INFORMATION DATA ENTRY

Remember that you are limited as to the amount of characters that will save in our system. You may contact TxDOT's Agency Contact for a hard copy of the application that has the alpha and numeric guide on it. (To be used as a guide only).

FROM THE FIRM SCREEN SELECTION MENU, SELECT:

3.1 Firm General Information Screen

This screen contains general information about your firm and your firm's equipment list. Your firm name and sequence number will appear in Green under the two Menus called Firm Screen Selection and Employee Screen Selection.

All UPDATE buttons, on this screen, will update all fields. All changes will be LOST unless you click the UPDATE button before leaving this screen and check the Message Center.

- Enter the following information on this screen:

Date This Name Was First Used: - The date the firm started using its current name. Enter a complete date. Select a month from the drop down menu.

Federal Employer Tax ID - This is a required field. A unique number assigned to a firm for tax purposes usually found on the Comptroller's Website.

CEO/President Name - The name of the person in charge of the firm.

Select a Firm Type: Make a selection from the drop down menu.

Firm Personnel Totals – This is where we look to see that your firm has the support staff to perform any job you are hired to do. Enter the total number of Nationwide and Texas firm employees who are:

- Total Professional/Licensed: Classified as professional or licensed
- Total Graduate: Obtained graduate degrees and are licensed
- Total Technical Support: Provide technical support
- Total Other Support: Provide other support

Equipment Type Information – This is a required field. TxDOT has to see that your firm has the equipment to perform any job you are hired to do. Or, if the minimum requirement for any work category code is that your firm has access to the equipment to perform the work, it should be listed here.

- List up to 20 types of equipment the firm owns/has access to perform the work.
- Select a Type of Equipment from the drop-down menu.
- Enter the Total Quantity of each type of equipment a firm owns.
- In the Comment Field, you may provide a short free-form description of the type of pertinent equipment.

Hit the Update button and check the Message Center.

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NEXT, FROM THE FIRM SCREEN SELECTION MENU, SELECT:

3.2 Firm Previous Name Information

This screen contains information about a firm's previous name(s) it has operated under

All UPDATE buttons, on this screen, will update all fields. All changes will be LOST unless you click the UPDATE button before leaving this screen and check the Message Center.

- Enter the following information on this screen:
  Previous Name – The name that the firm may have operated under previously
  Date First Used - The date the firm began using the previous name
  Date Last Used - The date the firm last used its previous name

Hit the Update button and check the Message Center.

FROM THE FIRM SCREEN SELECTION MENU, SELECT:

3.3 Firm Branch Information

This screen contains the firm's physical and mailing addresses, email addresses, phone numbers, contacts and branch locations.

All UPDATE buttons, on this screen, will update all fields. All changes will be LOST unless you click the UPDATE button before leaving this screen and check the Message Center.

Branch Selection Menu – Your Main Branch information should be in the Branch Selection Menu. Check the information to make sure it is correct. Make sure the Branch Contact Information phone number is in the space provided. This is the phone number that will appear on our website of precertified firms once your employees are precertified. You will want to make sure it is correct.

Make sure there is a Physical as well as a Mailing Address. We get mailing lists from the Mailing Address fields. You will want to be included in all mailings.

- **To update (change or correct) the Corporate Office (Main Branch) information**, First, select Corporate Office (Main Branch) from the Blue Drop Down Branch Selection Menu. Then, select the button called Update Branch. Type in your information, hit Update Branch again. Check the Message Center.

- **To Add a Branch Office Location:** First, select Clear Screen to Add Branch. Type in your information, hit the Add Branch button. Check the Message Center. Up to eleven (11) branch offices can be stored in the system.

- **To Delete a Branch Record:** Find the branch record you want to delete in the Blue Branch Selection Menu. Once you have the branch record on the screen, click the Delete Branch button. The Message Center will tell you to click the Delete Branch Button to delete or any other button to abort. Hit the Delete Branch Button Again. Be sure to check the Message Center to confirm your transaction.

3.4 Firm Category of Work Information Screen (View Only)

This screen lists the technical Categories of Work that a firm's employees are precertified in. This screen is a View Only screen. Once an individual is precertified in a category, then that category will automatically show here as precertified for your firm.

- You cannot delete categories that have been pre-certified by TxDOT. In order to Delete a precertified category; contact TxDOT's Agency Contact for Precertification http://www.dot.state.tx.us/des/consultinfo/AgencyContact.htm

4 EMPLOYEE INFORMATION OVERVIEW DATA ENTRY

FROM THE EMPLOYEE SCREEN SELECTION MENU, SELECT:

4.1 Add New Employee

This screen gives you the opportunity to add a new employee to the system.

NOTE: Do NOT enter a precertified employee's name that needs to be transferred from his/her old firm to your firm. Employee's precertified files can be moved from firm to firm. Contact TxDOT's Agency Contact for precertification for transfers.

- Input the new employee name in the correct format: Last, First, Middle Initial

- Input the branch record number. This number corresponds to an existing branch record in the system. If this new employee works at a branch, currently in our system, this branch number should be used, or, use '00' for the branch number which is your main branch number.

- Click the "ADD NEW EMPLOYEE" button. The Message Center will confirm your transaction. To find the employee name you just entered, follow the instructions below.

GO BACK TO THE EMPLOYEE SCREEN SELECTION MENU, SELECT:

4.2 Employee Certification Information

Select the employee's name from the list generated by clicking on the name. Note that if you have only entered one name, only that name will appear close to the bottom of the screen under Please Select an Employee.

This is your employee's Minimum Academic Requirement information.

TxDOT gives you 15 Personnel Certification spaces under Employee Certification Information but, please do not input a resume. We only need to see the minimum requirement for any category your employee wants.

- All UPDATE buttons, on this screen, will update all fields. All changes will be LOST unless you click the UPDATE button before leaving this screen and check the Message Center.

- Under Employee General Information, if you select a code from the drop down menu, such as P.E. (100000), then you must input an Issue Date, Expiration Date, Certification Number and Issuing Agency. Only complete dates will be saved.

If the employee is a P.E., RPLS or Architect input the information in the following way:

- ✓ Degree Type: BS, MS, PHD, Surveyor etc.
- ✓ Training Type: Engineering/RPLS etc.
- ✓ Training Date: Month, Date, Year of Registration
- ✓ Select a Personnel and/or Laboratory Certification Type: 100000 (P.E.) or 112000 for RPLS etc.
- ✓ Issue Date: Month, Date, Year of Issuance
- ✓ Expiration Date: Month Date Year (current exp date)
- ✓ Certification Number: P.E. or RPLS Registration Number
- ✓ Issuing Agency: Agency that gave the Registration (i.e. State of Texas)

Hit the UPDATE Button and check the Message Center

If the employee holds a required degree, input the information in the following way:

- ✓ Degree Type: BS, MS, PHD etc.
- ✓ Training Type: Field of Study (i.e. Urban Planning, History, Archeology)
- ✓ Training Date: Date of Graduation (you may estimate Mo/Date but, only complete dates will be saved)
- ✓ Select a Personnel and/or Laboratory Certification Type: leave blank
- ✓ Issue Date: leave blank
- ✓ Expiration Date: leave blank
- ✓ Certification Number: leave blank
- ✓ Issuing Agency: School/University that Gave the Degree

Hit the UPDATE Button and check the Message Center

If the employee has a required training class, input the information in the following way:

- ✓ Degree Type: Wetland Delineation (i.e.) or, Bridge Inspection, etc.
- ✓ Training Type: Wetland Delineation or Bridge Inspection (i.e.), etc.
- ✓ Training Date: Year Month Date of Training (only complete dates please)
- ✓ Select a Personnel and/or Laboratory Certification Type: leave blank
- ✓ Issue Date: leave blank
- ✓ Expiration Date: leave blank
- ✓ Certification Number: leave blank
- ✓ Issuing Agency: Army Corps of Engineers/Wetland Training Inst or, National Highway Institute/NHI or NICET (i.e.) etc.

Hit the UPDATE Button and check the Message Center

GO BACK TO THE EMPLOYEE SCREEN SELECTION MENU, SELECT:

4.3 Employee Category of Work Information

This screen lists all the work categories available for precertification.
Note that the categories you select here have to match the categories in the employee's Previously Completed Projects section.

- Select a category(s) of work by placing a check mark (✓) in the box applicable and hitting Update.

The category will have a check mark beside it and it will say "NEWLY ADDED CATEGORY, SEND NOTIFICATION FOR REVIEW"

Once the notification has been received the Consultant Contract Office will remove the SEND NOTIFICATION FOR REVIEW and the category will say PRE-CERTIFICATION IS PENDING IN THIS CATEGORY. (Allow 3 days for receipt of notification once you hit Send Notification)

Hit the UPDATE Button and check the Message Center

- To request to be re-reviewed for a category that was previously denied, place a check mark in the box to the far right of a denied category in the column titled Check to Reapply if "NOT PRE-CERTIFIED" Hit the UPDATE button and the category will be checked and it will say "NEWLY ADDED CATEGORY, SEND NOTIFICATION FOR REVIEW" (prompting you to hit Send Notification)

Hit the UPDATE Button and check the Message Center

Once the notification has been received the Consultant Contract Office will remove the SEND NOTIFICATION FOR REVIEW and the category will say PRE-CERTIFICATION IS PENDING IN THIS CATEGORY. (Allow 3 days for receipt of notification once you hit Send Notification)

NOTE that if after five days, your category still says "SEND NOTIFICATION FOR REVIEW' you need to hit the Send Notification button to initiate the review. The Send Notification button is located on the Main Menu page.

- ✓ The status of your precertification will be reflected on the Employee Category of Work Information screen as soon as the review is complete.
- ✓ When the review is complete, it will show either a check mark beside the category and it will say "THIS CATEGORY WAS PRE CERTIFIED ON (date of precertification)" or, it will show a check mark with "NOT PRECERTIFIED" and there will be a brief comment as to why it was denied.

- ✓ The Category of Work Information Screen and the Employee Category of Work Precertification Summary Screen will both show you as soon as the category of work has been either precertified or denied (Reviewed).

GO BACK TO THE EMPLOYEE SCREEN SELECTION MENU, SELECT:

4.4 Employee Previous Project Information

At this time, only ten projects per employee are allowed. Please do not enter more than ten.

This screen contains information about an individual's previously completed project work experience. The categories you select to put under your projects must match the Employee Category of Work Information section's work category codes.

A maximum of 20 project records can be currently stored in the system but, only ten are allowed at this time.

The Project Selection Menu will automatically be on Project 1 for a new employee.

- **TO ADD A PROJECT**: First hit the button called CLEAR SCREEN TO ADD PROJECT. Then type in your information. Then hit ADD PROJECT again. Check the Message Center.

Some fields in the projects will only accept numbers and zeros. The date fields will only accept complete dates. Some fields MUST be completed. These are indicated by an asterisk (*)

CHECKING THE MESSAGE CENTER:

IF THE MESSAGE CENTER DOES NOT DISPLAY "PROJECT ADDED OR UPDATED SUCCESSFULLY", it will tell you what is wrong with your input. Go back to the project, make corrections and hit UPDATE Project and check the MESSAGE CENTER again. Until the MESSAGE CENTER says project added or updated successfully, it has NOT SAVED YOUR INFORMATION.

Project Name –
This is a required field. Assign a name to the project (example The Beltway or IH35 from Airport to Barker Lane)

Location –
This is a required field. Input the highway name or the city/state or physical address.

Date Began –
This is a required field. The complete date (month/date/year) on which the employee began work on the project.

Date Completed –

This is a required field. The complete date on which the employee completed work on the project. Or if ongoing, today's complete date (we can't give credit for experience in the future so, ongoing = today's date).

Enter a General Description for this Project (up to 5 lines) –
This is a required field. Input a brief description of the work you performed on the project that demonstrates how you meet the minimum requirement for the categories this project covers**.** The space provided will allow only 300 characters (5 lines with 60 characters per line) you may abbreviate as long as we can understand what you are trying to tell us.

Contract Number –
The contract number of the project (if one is available).

Project Manager Name –
The name of the firm's project manager when the work was done. The project manager can be the same as the employee.

Client Name –
The name of the client (firm, individual or organization) for which the employee did the work. (if known).

Client Contact Name –
The name of the person to contact at the client's office (if known).

Client Phone Number –
The telephone number of the client's office (if known).

Estimated Construction Cost –
The estimated cost of the project, (if applicable) in whole numbers. (No cent or dollar signs, no decimals and only if known).

Estimated Project Fees –
The consultant estimated fee paid to the firm for the project (No cent or dollar signs, no decimals and only if known).

Scroll down the Page.

Select a Category of Work –
This is a required field. At least one category must be entered. Select a category from the drop-down menu. Ten per project are allowed. All categories here must match the Categories Section for the Employee.

Description of Work Completed in This Category **–**
You may Input a brief description of the work that the employee did on the category. The space provided allows for 120 Characters, (2 lines with 60 characters per line).

You may abbreviate as long as we can tell what you are trying to say. This field is optional. If you need it, you may use it.

- **TO UPDATE A PROJECT**: Select the project from the blue drop down menu called PROJECT SELECTION MENU. First hit the button called UPDATE PROJECT, Type in your information. Then hit UPDATE PROJECT again. Check the Message Center to make sure it has updated successfully.

- **TO DELETE A PROJECT:** Select the Project from the Project Selection Menu. Make sure you are on the project to be deleted. Click the DELETE PROJECT button. The Message Center will tell you to hit DELETE PROJECT again or select any button to abort. Hit DELETE PROJECT again. Be sure to view the MESSAGE CENTER to confirm your transaction.

  - ✓ Once you have completed the three parts of the precertification application for all of your employees (Certifications, Categories and Projects), go to the top of the screen and select MAIN MENU.
  - ✓ This takes you back to the Main Menu page where there is a SEND NOTIFICATION button at the bottom of the page. In order for your application to be reviewed, the SEND NOTIFICATION button has to be hit. It will prompt you to hit it again. Make sure you hit the Send Notification button twice.
  - ✓ Your information will not be reviewed until you hit SEND NOTIFICATION twice.

4.5 Employee Category of Work Precertification Summary

This screen provides the status of your precertification and lists the technical work categories that the employee has requested. It is a view only screen. When a decision regarding precertification has been made, it will show on this screen.

5 REPORTS

5.1 Types of Reports

There are several reports that can be downloaded from CCIS Online provided that there is information in the system to generate your report.

Reports from the Firm Screen Selection Menu

These two reports show you everything in our database you have entered for your firm or firm and all employees (The Application):

- Precertification Questionnaire (FIRM ONLY)
- Precertification Questionnaire (FIRM and all EMPLOYEES)

These three reports show you everything in our database that your Firm or Firm and Employees are precertified in (note: There has to be information in the system to generate the report and note that Status Reports from either menu have three pages even if there are no denied or pending categories):

- Precertification Status Report (FIRM ONLY)
- Precertification Status Report (FIRM and all EMPLOYEES)
- Precertification Status Report (all EMPLOYEES only)

These three reports show you evaluations for contracts you may have been given by the District or Division offices of TxDOT (Note that there has to be information in our system before there will be a report to download):

- Evaluation Report (FIRM ONLY)
- Evaluation Report (FIRM and all EMPLOYEES)
- Evaluation Report (all EMPLOYEES only)

Reports from the Employee Screen Selection Menu

These two selections show you what you have input for your selected employee or, your selected employee and the firm (The Application):

- Precertification Questionnaire (Selected EMPLOYEE only)
- Precertification Questionnaire (FIRM and Selected EMPLOYEE)

These two reports show you what your selected employee and or, firm and selected employee are precertified in (note that Status Reports from either menu have three pages even if there are no denied or pending categories):

- Precertification Status Report (Selected EMPLOYEE only)
- Precertification Status Report (FIRM and Selected EMPLOYEE)

These two reports show you evaluations for contracts you may have been given by the District or Division offices of TxDOT for your employees:

- Evaluation Report (Selected EMPLOYEE only)
- Evaluation Report (Firm and Selected EMPLOYEE)

If you select the Blue Highlighted CCO-15 Prime Provider Evaluation Form, you will first have to select the employee name, and then a menu of employee contract evaluations will appear. Select the contract evaluation you want to review, and it will show you the actual Evaluation Form where that employee was evaluated for the contract.

5.2 How to retrieve a firm or employee report

- ✓ First, select the report you need from either drop down menu.

- ✓ If you select a report from the Employee Screen Selection Menu, you will have to first choose an employee name from the generated menu of employees for the report. (Selecting from the Employee Screen Selection Menu reports will take you to the menu of names and then, the screen with the Download Report button).

- ✓ After you have selected the report to be downloaded, it will take you to the screen where a Download Report button is located at the bottom of the screen.

- ✓ The Message Center will tell you that your report is being generated.

- ✓ Click on the Download Report Button.

- ✓ One of two things will happen.

- ✓ If a screen appears that says that your report has not been downloaded yet, it will have an EXIT button at the bottom. Click on the EXIT button, then on the DOWNLOAD REPORT button (over and over) until a pop up appears that asks you what you want to do with the report.

- ✓ ASK it to SAVE your REPORT to your DESKTOP.

- ✓ If a screen appears that asks you if you want to RUN, SAVE or CANCEL, ask it to SAVE the report to your DESKTOP.

- Minimize all screens and your report will appear on your desktop as a little blue icon with a white bar across the top.

- Click on the icon, it will ask you if you want to RUN the report.

- Click on the RUN button and a black screen will run and disappear then a little icon will appear under the other icon as a little steno notebook.

- That is your report in Text format.

- You can save it, print it or whatever you want to do with your report.

  - ➢ There is also a selection under the DOWNLOAD REPORT button called

    View your report via a new browser window

    If you make this selection, the system will either generate your report in another browser window or, it will show you a page that says Page Not Found. If you get the Page Not Found, exit out of the Page Not Found Screen and hit DOWNLOAD REPORT until your report is generated in a new browser window.

5.3 Helpful Links from the Sign On Screen

In the upper right hand corner of the sign on screen, there is a drop down menu that will allow you to navigate to TxDOT links. Here are the four choices and what they link to:

1. Consultant Precertification: Links to TxDOT's site for Precertification

2. TxDOT's Working Category List: Takes you to a list of work category codes with other links

3. Listing of Precertified Firms Sorted by Firm Name: Links to the list of precertified firms.

4. List of Precertified Firms by Working Category: Takes you to a screen where you can download a **Report** that is a list of firms precertified in a specific work category (s). Follow the directions in 5.2 above to download the reports. Note that if you select more than one category, you will only get a list of EVERY firm that is precertified in ALL Work Category Codes you selected.

Alphabetic Business Listing: In the upper left corner is a drop down menu that has self explanatory Business Topic selections.

REMINDER: Reminds you to change your password in a timely manner and gives you guidance for selecting a password (**Need Help Selecting a Password?**).

Click here for User ID and/or Password Assistance: Takes you to a screen that will allow you to send an email to the Consultant Contract Office for assistance if you let your password expire (User ID Invalid/User ID Suspended).

NOTICE in the highlighted paragraph above where you sign on: Notifies you that you have to hit the Send Notification button located on the Main Menu page to notify us that you have entered information into the system to be reviewed.

6 Annual Renewal

6.1 Renewal Information

In order for your firm to maintain Active Status with TxDOT, you will need to 'renew' your firm's precertification information once a year.
Active Status is necessary in order to submit a Letter of Interest for a Professional Services Contract.

If your firm's renewal status is 'Inactive', you will need to complete the brief renewal process.

If your firm's renewal status is 'Inactive', when you first log onto CCIS Online, you will See this message displayed in the MESSAGE CENTER

Your Renewal Status Is Expired. Please select Renewal from the Firm Screen Selection Menu or, the System Navigation Links. Your firm has been sent (1)

email reminder(s). You may change or edit this email address from the Renewal Page (step 4 on the Renewal Process page)

There are four simple steps to 'renewal'

6.2 Renewal Instructions

- Log onto CCIS Online using your User ID and Password.

- Select Renewal from either the System Navigation Links or the Firm Screen Selection Menu

- This takes you to a page where you will see the four steps (in green) that you will need to Complete your firm's Annual Renewal

  - Select Step One by clicking on the blue
    Click Here to Review Your Branch Information

    This takes you to your First Branch Office Information. Check that all information is correct, make any corrections, and hit Update.
    Select your other branches from the blue Drop Down Menu, make any corrections and hit Update until all branches have been checked and corrected.

    When you are finished checking and correcting all branches, select Firm Renewal from the System Navigation Links or, Renewal from the Firm Screen Selection Menu.

    This takes you back to the Renewal page.

    Place a check mark in the box to the left of the blue Click Here to Review Your Branch Information. By checking the box, you are confirming that the information is correct.

  - Select Step Two by clicking on the blue
    Click Here to Review Your Employees

    This takes you to a page where you will see your employees listed. There is a scroll bar to the right of the list where you may scroll through all of your listed employees. Check that all individuals listed are currently employed by your firm.

    If they are not members of your firm, place a check mark in the box to the left of the name, hit Update.

    This selects the employee's file for removal from your firm listing. The employees you select to be removed will be moved to a Holding File until TxDOT is contacted to move their file to another precertified firm.

When you are finished checking all employees listed, select Firm Renewal from the System Navigation Links or, Firm Renewal from the Firm Screen Selection Menu to return to the Renewal page.

Place a check mark to the left of the blue Click Here to Review Your Employees. By checking the box, you are confirming that all the employees listed are members of your firm and that the selected employees should be removed from your firm listing.

- Select Step Three by clicking on the blue
  Click Here to Review Your DBE/HUB Information

  This takes you to the DBE/HUB Information screen.

  If your firm is currently a DBE, enter your DBE Certification Number, and DBE Expiration Date.

  If your firm is currently a HUB firm, enter your firm's HUB Certification Number and HUB expiration date.

  If your firm is not a DBE or HUB firm, place a check mark in the box to the right where is says: Not currently a DBE or not currently a HUB firm.

  Note that you must either enter information for DBE/HUB or, select Not a DBE or HUB firm in order to complete this information page.

  Hit the UPDATE DBE/HUB Information button and check the Message Center to confirm that your information has been updated successfully.

  When finished, select Firm Renewal from the System Navigation Links or Renewal from the Firm Screen Selection Menu

  This takes you back to the Annual Renewal Page

  Place a check mark to the left of the blue Click Here to Review Your DBE/HUB Information. By checking the box, you confirm that the information is correct.

- Select Step Four by clicking the blue
  Click Here to Review Your Correspondence Information

  This takes you to a page where you will see all of your branches' information summarized.

  Place a check mark in the box to the left of the branch(s) you wish to receive emails and other correspondence regarding precertification, contracting, and other transportation related information then, hit the Update Button.

You may click on the branch information to make any corrections. By clicking the branch, you go back to the page where you can change, update or add branch information. Or, you may simply place a check mark to the right to select the branch(s) you want to receive correspondence.

Note that you may select branches to receive correspondence or change/update branch information after the renewal process has been completed at any time by selecting Firm Correspondence from the Firm Screen Selection Menu.

When you have finished selecting branches for correspondence, select Firm Renewal from the System Navigation Links or, Renewal from the Firm Screen Selection Menu.

This takes you back to the Annual Renewal page where you will place a check mark to the left of the blue Click Here to Review Your Correspondence Information. By checking the box, you confirm that the information you selected is correct.

Checking Your Correspondence is your last step in the Annual Renewal Process.

All four boxes must be checked before your firm can be renewed for the year.

When you have finished checking all information, made corrections and have confirmed that all information that you selected is correct by checking the boxes, Click on the **UPDATE RENEWAL STATUS** button

Once you have successfully completed the Annual Renewal process, the Message Center will display this message:

RENEWAL COMPLETED SUCCESSFULLY. YOU MAY PRINT A RENEWAL PDF BELOW. CLICK LOG OFF OR MAIN MENU FROM SYSTEM NAVIGATION LINKS TO CONTINUE.

You will see Firm Renewal Date/Status under your firm name. You will see a green 'thumbs up' and it will say 'Monday, February 1, 2011(today's date) (Renewal Status is Active) 411 days remaining (or however many days remain)'

You will be able to print a PDF Annual Renewal Certificate below the Firm Renewal Date/Status. Just click on the link: 0000firmseq.no_renewal_certificate[mo/date/year].pdf

Your firm's Annual Renewal Status will be displayed in the Message Center every time you log on after you have renewed successfully. The Message Center will say
Your Renewal Status Is Active. Your Firm Has 411 (or however many) Days Remaining Before Expiration.**

It will also be displayed on the Firm Renewal Page when you log onto CCIS Online and select either Firm Renewal from System Navigation Links or Firm Renewal from the Firm Screen Selection Menu

Your Annual Renewal Status will also be displayed on the Precertified Firms page on the Internet at this address 24 hours after Annual Renewal is complete (it takes that long to go to the site): http://www.dot.state.tx.us/des/precert/precrt1.htm

If you have any questions, need assistance or need to revise any information that cannot be accessed through the existing menu options, please contact TxDOT's Agency Contact for Precertification http://www.dot.state.tx.us/des/consultinfo/AgencyContact.htm

Sierra Salinas
PEPS Division Precertification
Administration & Finance
125 E. 11th Street
Austin, Texas 78701-2483 Phone:
512.960.5271
E-mail: Sierra Salinas@txdot.gov