



OKLAHOMA **Transportation**

**System for Construction
Pre-Qualification
(CPQ)**

User Guide

May 14, 2021

Purpose:

This guide will help the user through the application process of to become qualified for construction work.

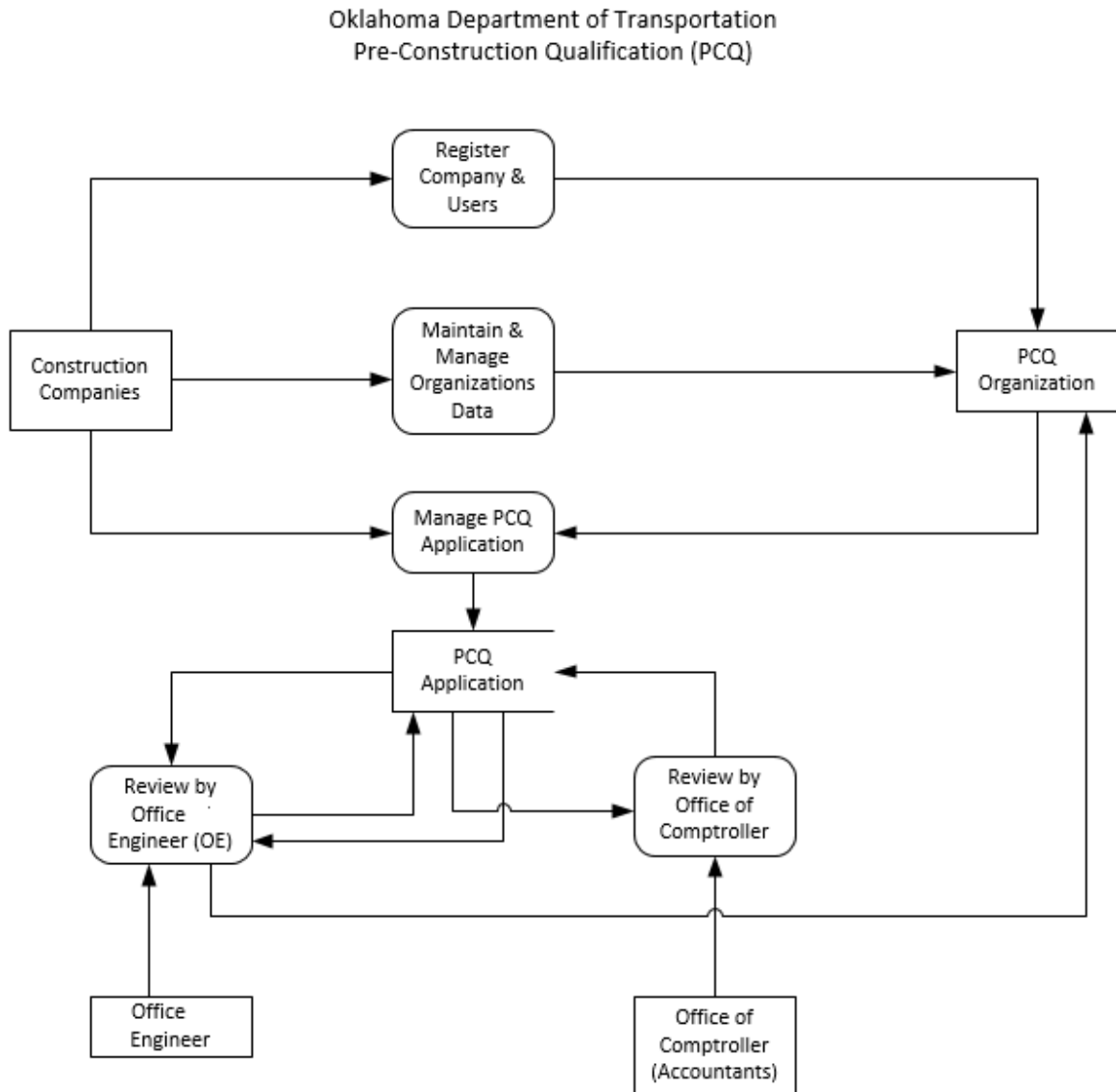
Overview:

In order for the user to work in PCQ System, they must register to create a userid. Upon completion of this, the system will email a temporary password. The user can then log into the system. Once in the system the user will create a main record. Other records such as equipment list, experience, officers, etc will be related to the main record. The system uses a wizard to gather information from the user by going from page to page querying for information. The organization cannot complete more than one application per day. When all pages are complete, the Office Engineer Division (OE) will review the application. Once they have completed their review it will be sent to the Comptroller Division. Upon completion of the comptroller's analysis they will send the application back to the OE. The OE will review the application and send the results to the applicant.

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System Processing and flow of data through the process



The System Flow Diagram shows how data will flow through the system. Organizations will need to register with the CPQ System. Several employees can register with the same company, but they must have unique userids and spell the companies name consistently. For example, need all spaces, periods, abbreviations, and spelling of the company to be the same. With this process users will receive a temporary password and will be able to login to the CPQ System. At this point users will be registered with their organization; however, they will need an employee (referred to as the Primary Account Manager) from their company to authorize them to do work on behalf of the organization.

Once, this information is stored the primary account manager will be able to maintain and manage the organizations information. The primary account manager will have access to the company record, such as name, address, phone number and other contact information. They will also manage the employees and give authorization to those who can add and edit company applications.

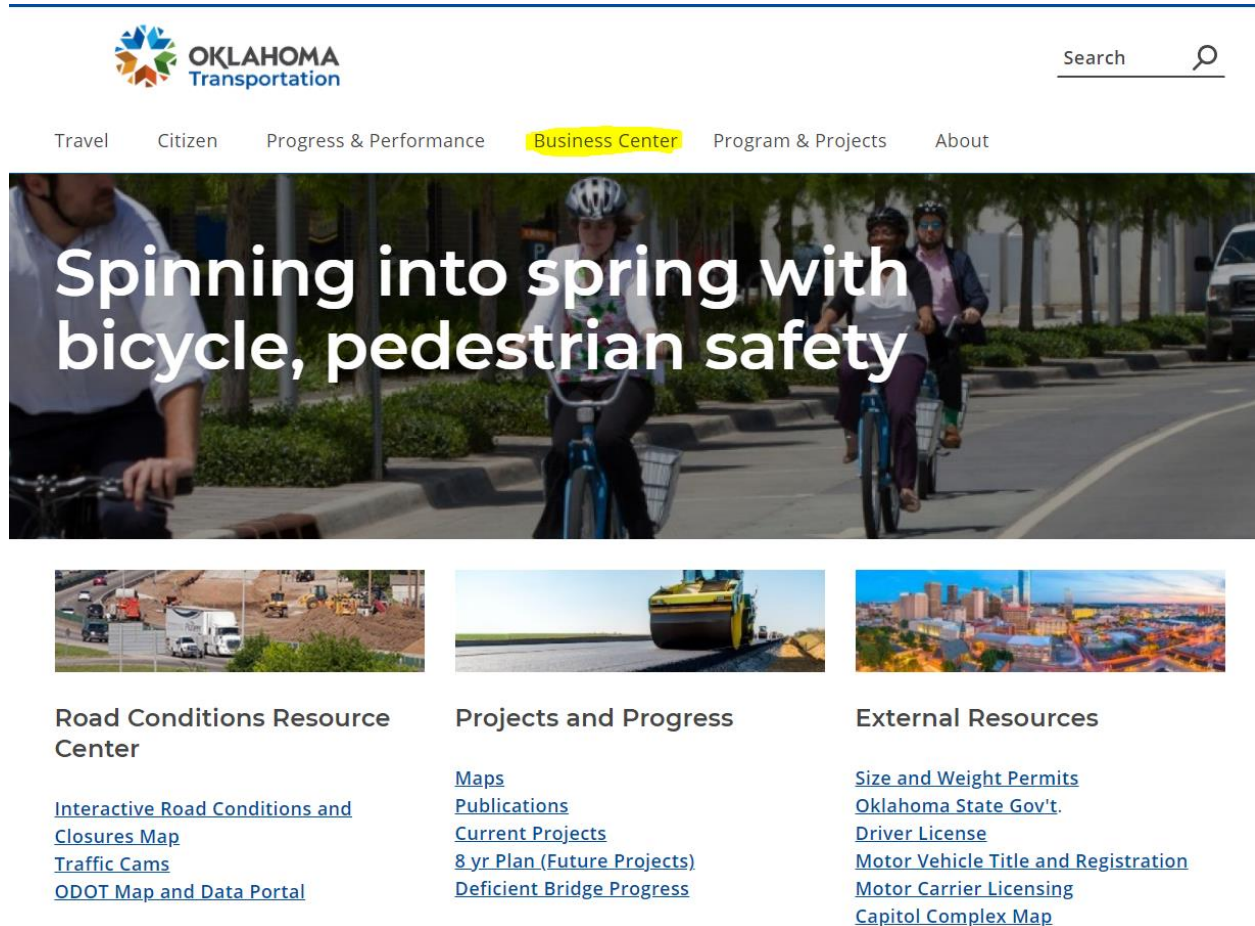
When employees are authorized to work on behalf of an organization, they can enter an application for Construction Pre-Qualification. There will be a several pages that will need information about the company, employees and work experiences.

After completing all necessary questions on the pages, the application can be submitted to the Office Engineer (OE), where they will review the application. If they see any problems with the application, they will return the application to the organization with a reason for the return. This will be done by email. But, it is highly advised that the user view the status in the CPQ system, as emails at times do not make it to their respective inboxes.

If the OE sees no problem with the application, it is then forwarded to the Comptroller's Division. Here, there will be a review of the organization's finances. A work sheet is created to obtain the organizations Pre-Qualification total. This total will be used for bonding requirements. The accountant in the Comptroller's office will complete the worksheet and forward to an approver, who will look over the worksheet to verify no errors have been made. The approver will forward the application along with the worksheet back to the OE. The OE will have a final decision on the organization's status.

Registering for CPQ – Creating a UserID and Log in to CPQ

Connect to the ODOT web site at <http://odot.ok.gov> and look for the Business Center menu item. Click on the Business Center link.



The screenshot shows the Oklahoma Transportation website. The header includes the ODOT logo, a search bar, and a navigation menu with links: Travel, Citizen, Progress & Performance, Business Center (highlighted in yellow), Program & Projects, and About. Below the navigation bar is a large banner image of people riding bicycles on a city street, with the text "Spinning into spring with bicycle, pedestrian safety" overlaid. Underneath the banner are three columns of content:

- Road Conditions Resource Center**
 - [Interactive Road Conditions and Closures Map](#)
 - [Traffic Cams](#)
 - [ODOT Map and Data Portal](#)
- Projects and Progress**
 - [Maps](#)
 - [Publications](#)
 - [Current Projects](#)
 - [8 yr Plan \(Future Projects\)](#)
 - [Deficient Bridge Progress](#)
- External Resources**
 - [Size and Weight Permits](#)
 - [Oklahoma State Gov't.](#)
 - [Driver License](#)
 - [Motor Vehicle Title and Registration](#)
 - [Motor Carrier Licensing](#)
 - [Capitol Complex Map](#)

This will bring up the following page. Click on the link Contractor Prequalification.

BUSINESS CENTER

Work with Us

Doing business with ODOT

- [Design Consultant Services](#)
- [Contractor Prequalification](#)
- [Pre-Construction](#)
- [Careers at ODOT](#)

Opportunities

Bid on Projects or Review Decisions

- [Approved Bid Opening List](#)
- [Highway Construction Bidding](#)
- [Procurement & Contract Services](#)
- [Land for Sale](#)

Project Support

Design & Construction Documents

- [Construction Engineering](#)
- [Project Management](#)
- [Consultant Contract Information](#)
- [CADD](#)

Once on the Contractor Prequalification page click on the Contractor's Prequalification Application.



Current Traffic
Conditions

Public Transportation
Services

State Engineer Division > Contractor Prequalification

Traveler's Information

ation

How to get qualified

Click the Contractor Prequalification Application portal link below.

- [Contractor's Prequalification Application](#)
- [Instructions and Training Manual](#)
- [Oklahoma Secretary of State Administrative Code](#) Title 730:25
- [Non-prequalified Contractor Application](#)

This will bring you to the login page for CPQ. New users will need to create a userid. The userid must be unique. The created record will be associated with the company name, but not

authorized to do business on behalf of the organization. To do this, Click on the Create New Userid button. As seen on the illustration below.

Pre-Construction Registration Applications are now being accepted via the on-line system. Construction Owners need to register the company along with their authorized users.

Get started with the

===> [Training and User Guide](#) <===

Create UserID


CREATE NEW USERID

If you want to be able to submit applications, you must register with the system



Construction Projects

 username

 password

Log In

CPQ – User Guide

A screen similar to the following will appear. If the user is the first to register a new organization, please enter the company's official name. All employees that register thereafter, will need to enter the exact name of the company (spaces, punctuation marks and titles all included), otherwise they will be creating a new company and record. All users that enter the exact company name will be registered with that company, but not authorized to do business on behalf of that company. A primary account manager will need to manage the users. Thus, security is left to the organization. Those that can work on behalf of the organization will be able to edit/add applications.

User Access Request for the ODOT On-Line System

Instructions

Step 1) Complete this form and submit your request.

Step 2) The Organization's Primary Account Manager will need to authorize you to do business for the Organization before your userid becomes active.

Step 3) Go to your email and look for the message from this process.

Step 4) Follow the link to log in using the userid and password in the email. You will be asked to change your password.

Step 5) You can then log in and begin using the system.

On-Line Administration Access Request

Organization Name

Primary User Area

- You MUST Select One -

First Name

Middle

Last Name

Street

City

Oklahoma City, Tulsa, Norman, Edmond, Moore

State

OK

Zip

include the dash if entering zip + 4

Email

Phone

Enter as 9999999999

Title

User Name / User ID (this will be your login id - please do not use spaces in the name)

Submit

When the information is submitted to the DB, the system will send the user a temporary password which can be used to enter the CPQ system. The user will need to return to the login page and enter their userid and temporary password as seen below.


Create UserID

CREATE NEW USERID

If you want to be able to submit applications, you must register with the system using the button above. Then come back here and log in with your userid. You only need to register 1 time to get your userid. Any questions, please call (405) 522.5279.



Construction Projects

 odotfa

 password

Log In

Trouble Logging In?

[Forgot My Password](#)
[Forgot My Username](#)

CPQ's Home Page

Home

General Message

General Message....

Beta Testing of the Portal is happening now!

This application is to be filed with the Office Engineer, Oklahoma Department of Transportation (hereafter called ODOT) for the purpose of qualifying to bid on construction projects.

On July 25, 2019, Oklahoma Administrative Code (OAC) 730:25 was amended. This subsection of the OAC governs the Department's rules and requirements for the prequalification of contractors for highway construction. Because of the amended rules a contractor's prequalification status will expire every two years, and must be renewed within 180 days of the expiration date in order to maintain the existing prequalification status. (The updated ODOT Contractor Prequalification Application and Rules for Prequalification can be found on the ODOT website.)

Organizational Record

Edit ↑	Company name	Street	City	State	Zip	Email	Phone	Address2	Address3	Created date	Org type	Primary acct mgr
	ICFI	200 N. E21st Street	Oklahoma City	OK	73105	pwallace@odot.org	405-202-0464	-	-	27-AUG-2013	Utility Owner	PHILIP WALLACE

1 - 1

My Account Record

Edit ↑	User Name	Last Name	First Name	Middle Name	Street	City	State	Zip	EMail	Phone	Company Name	Title	Created Date	Primary Acct Mgr	User Status	User Status Date
	ODOTFA	TEST	FRANK	-	200 NE 21ST STREET	OKLAHOMA CITY	OK	73105-1234	frank.arambula@omes.ok.gov	405-522-8054	ICFI	TESTER PERSON	14-JAN-2016	Y	ACTIVE	14-JAN-2016

General Message

Here the user will find announcements from the Office Engineer Division. This will be one source of information for contractors concerning the Construction Pre-Qualification System. Other information can/will include contact information for OE Personnel.

Organizational Record

Organizational Record												
Edit ↑	Company name	Street	City	State	Zip	Email	Phone	Address2	Address3	Created date	Org type	Primary acct mgr
	ICFI	200 N. E21st Street	Oklahoma City	OK	73105	pwallace@odot.org	405-202-0464	-	-	27-AUG-2013	Utility Owner	PHILIP WALLACE

The organizational record will show the companies information. Employees designated as primary account managers will be able to edit the company's information as well as authorize and activate/inactivate other employees. The Primary Account Managers display the edit column with a paper and pencil icon. Clicking on this icon will take the user to the following page.

CPQ – User Guide

Home \

Organizational Record Edit

Organizational Record Edit

Company Name: ICFI

Street: 11601 Kings Rd

City: Meeker

State: OK

Zip: 74855

Email: PWALLACE@ODOT.ORG

Phone: 4055221082 Format 9999999999

Address2:

Address3:

Created Date: 27-AUG-2013

FBI: 442587916

Organization Type: Utility Owner

Users that are **AUTHORIZED** to work on Pre-Construction for their Organization

Edit ↑↓	User Name	Last Name	First Name	Street	City	State	Zip	E-Mail	Phone	Company Name	Title	Primary Acct Mgr	User Status	Created Date
	PHILIP	WALLACE	PHILIP	4712 E 109	MEEKER	OK	74855	PWALLACE@ODOT.ORG	405-522-1082	ICFI	-	Y	ACTIVE	27-AUG-2013

Users registered by **NOT AUTHORIZED** to work on behalf of the organization

Edit ↑↓	User Name	Last Name	First Name	Company Name	Street	City	State	Zip	E-Mail	Phone	Prim Acct Mgr	Created Date	User Status	Title	Company Name
	153549	SURESH	SUE	ICFI	200 NE 21ST STREET	OKLAHOMA CITY	OK	73105	sue.suresh@omes.ok.gov	405-522-1334	N	18-MAY-2015	INACTIVE	ADMIN	ICFI

The page is divided into 3 parts. The organizational record to be edited. When editing this portion, make the necessary changes and then click on the Apply Changes button.

The second portion will show the users those employees registered and AUTHORIZED to do business on behalf of the company. They will be able to create/view CPQ Applications.

The final portion of the page shows employees registered and NOT AUTHORIZED to do business on behalf of the company. They will not be able to create/view CPQ Applications.

To authorize/unauthorized employees the process is the same. Click on the paper and pencil icon of the employee you would like to AUTHORIZED/UNAUTHORIZE. This will display the following page:

Edit Authorized User for Pre-Construction



Home \ Organizational Record Edit \

Edit Authorized User for Pre-Construction

User Name PHILIP

Name Last WALLACE

Name First PHILIP

Name Middle D

Street 4712 E 109

City MEEKER

State OK

Zip 74855

Email PWALLACE@ODOT.ORG

Phone 4055221082

Company Name ICFI

Title

Prim Acct Mgr Yes ▾

Authorized to Conduct business for Organization ICFI ▾

User Status ACTIVE

Active, Inactive

Created Date 27-AUG-2013

Cancel

Apply Changes


To AUTHORIZE a user, look for the label “Authorized to Conduct business for Organization”. Select from the drop-down list your organizations name. There will only be 2 choices – Not Selected and your organizations name. Next, verify the user status is set to active. Users can click on the word active located under the textbox. When these changes are completed, click on the Apply Changes button. When returning to the previous page, your employee should be found in the AUTHORIZED section of the page.

To change an employee to the NOT AUTHORIZED section, look for the label “Authorized to Conduct Business for Organization”. Select from the drop-down list Not Selected. Verify the user status is set to Inactive. Users can click on the work Inactive under the textbox. When the changes are completed, click on the Apply changes button. When returning to the previous page, your employee should be found in the NOT AUTHORIZED section of the page.

My Account Record

When users are logged into the PCQ system they will have the ability to edit and save their account record information by clicking on the paper and pencil icon.

My Account Record

Edit ↑%	User Name	Last Name	First Name	Middle Name	Street	City	State	Zip	EMail	Phone	Company Name	Title	Created Date	Primary Acct Mgr	User Status	User Status Date
	ODOTFA	TEST	FRANK	-	200 NE 21ST STREET	OKLAHOMA CITY	OK	73105-1234	frank.arambula@omes.ok.gov	405-522-8054	ICFI	TESTER PERSON	14-JAN-2016	Y	ACTIVE	14-JAN-2016

Clicking on this icon will display the following page:

[Home](#) \

Edit My Account Record

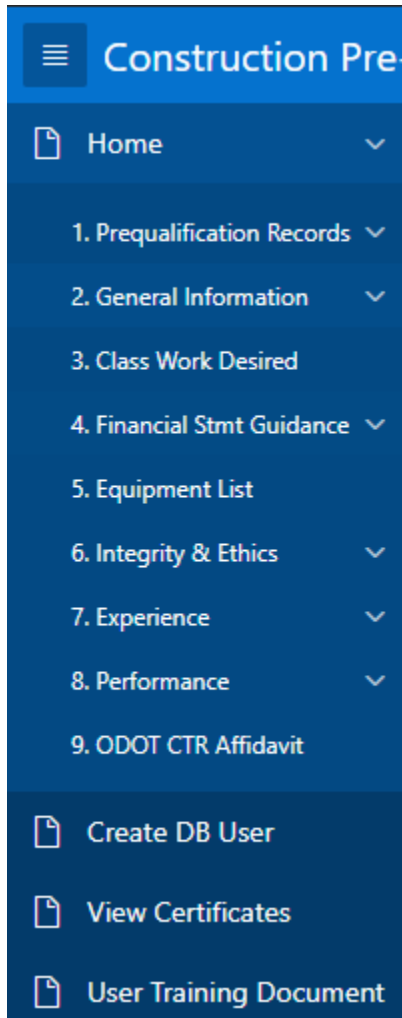
User Name	ODOTFA	
First Name	<input type="text" value="FRANK"/>	
Middle Name	<input type="text"/>	
Last Name	<input type="text" value="TEST"/>	
Street	<input type="text" value="200 NE 21ST STREET"/>	
City	<input type="text" value="OKLAHOMA CITY"/>	
State	<input type="text" value="OK"/>	
Zip	<input type="text" value="73105-1234"/>	Format 99999-9999 (if last 4 are known)
Email	<input type="text" value="frank.arambula@omes.ok.gov"/>	
Phone	<input type="text" value="4055228054"/>	Format 9999999999 (all numeric)
Company Name	ICFI	
Title	<input type="text" value="TESTER PERSON"/>	
Created Date	14-JAN-2016	
Primary Acct Mgr	Y	
User Status	<input type="text" value="ACTIVE"/> Active , Inactive	

After making the necessary changes, click on the Apply Changes button to save the information.

CPQ Systems Menu

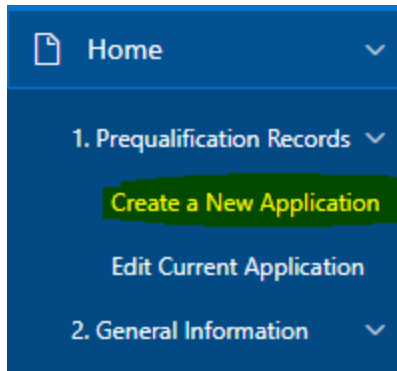
The main menu is divided into several sections. Clicking on the down arrow will display sub-sections. These sub-sections are designed to automatically flow from page to page. Each page will inquire about a certain subject. When the information has been gathered on that subject, clicking the next button will display the next page. The user must proceed through all pages and save the information at the end by clicking on the SAVE DATA button. If the users do not proceed through all the pages, vital information could be lost or not saved.

Some areas will not have any sub-sections. In this situation, there is only one page to display.



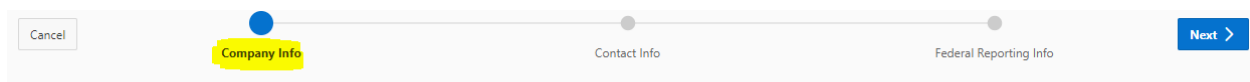
Prequalification Records

The prequalification record must be created first. All other records such as experience's, officers, equipment list, work desired, etc. will be associated with this record. If no prequalification record is created then the user will not be able to create the other records.



Create a New Application

Clicking on this sub-section will create the main record that all other records can be associated with. This is the first page the user will use to create their CPQ application – The Company Info Page. This particular page is pre-filled with information from creating an account record. All fields are required on this page; however, the company information can be edited when necessary. There is also a cancel button that will cancel this step.



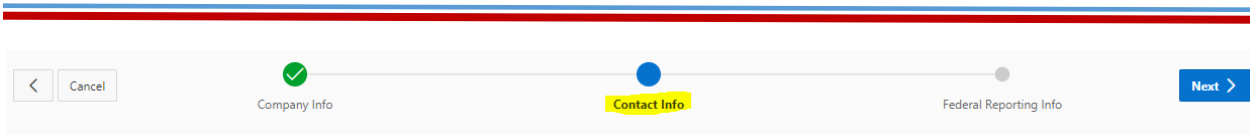
Step 1 - Initialize Construction Project Prequalification Application

Company Info

Date of Application	<input type="text" value="12-MAY-2021"/>	
Your Company Name:	ICFI	
Company Phone Number	<input type="text" value="4052020464"/>	enter numbers only - 9999999999 (no dashes or parenthesis)
Company Fax Number	<input type="text"/>	enter numbers only - 9999999999 (no dashes or parenthesis)
Mailing Address	<input type="text" value="200 N. E21st Street"/>	
City	<input type="text" value="Oklahoma City"/>	
State	<input type="text" value="OKLAHOMA"/>	
Zip	<input type="text" value="73105"/>	
Physical Address	<input type="text" value="200 N. E21st Street"/>	
City	<input type="text" value="Oklahoma City"/>	
State	<input type="text" value="OKLAHOMA"/>	
Zip	<input type="text" value="73105"/>	

Once this page is completed, the user will click on the next button, located at the upper right hand corner of the page. The wizard will then guide the user to the next page. In this case the contact information as seen below:

CPQ – User Guide



Step 1 - Initialize Construction Project Prequalification Application

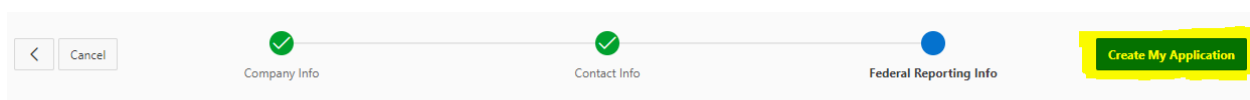
Contact Info

Primary Contact Name

Primary Contact Phone Number Enter as all numeric: 999999999 without dashes or parenthesis

Primary Contact Email Address

After completing the required information and clicking on the next button the wizard will take the user to the next page, Federal Reporting Information. However, if the user needs to go back a page the arrow button on the upper left hand side of the page, will take the user back a page.



Step 1 - Initialize Construction Project Prequalification Application

Company Info - FEI & SOS Filing Number

* Federal ID Number Do NOT enter dashes.

DUNS Number

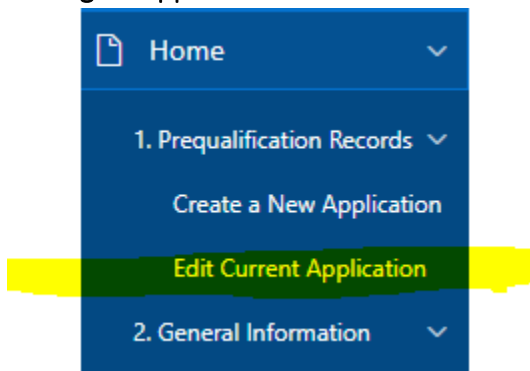
Number of Employees (at peak)

State of Incorporation

* SOS Filing Number (Proof of Register)

User will complete the information and click on the Create My Application button. After, clicking on this button, the system will take the user to the next section, General Information. The General Information section has 4 sub-sections: Ownership, Officer & Owners, Investors and Organizations. This is step 2 in the CPQ process.

Editing an Application



- Home
- 1. Prequalification Records
 - Create a New Application
 - Edit Current Application
- 2. General Information

CPQ – User Guide

To edit an application, click on the Edit Current Application sub link under Step 1 – Prequalification Records. The following page will be displayed.

Home \


List Prequalification Records

Company Information

ICFI

Current Pre-Qualification Record that can be Edited

Q v Go Actions v

	Date Of Statement ↓	Application Status	Mailing Address	Mail City	Mail State	Mail Zip	Physical Address (PA)	PA City	PA State	PA Zip	Name Of Contact	Contact Phone	Contact Email	FEI	Num Employees Peak	State Of Incorporation	Created Date	Created By	Updated Date	Updated By	App Status Date
	11-MAY-2021	Started	200 N. E. 21st Street	Oklahoma City	OK	73105	200 N. E. 21st Street	Oklahoma City	OK	73105	frank arambula	(405)202-0464	frank.arambula@omes.ok.gov	444444444	4500	CA	11-MAY-2021	FRANK TEST	-	-	11-MAY-2021

1 - 1

Past NonEditable Pre-Qualification Records

Q v Go Actions v

Application status	Application company name	Date of statement	Company phone number	Company fax number	Mailing address	Mail city	Mail state	Mail zip	Physical address	Pa city	Pa state	Pa zip	Name of contact	Contact phone	Contact email	Duns number	Feln	Num employees peak	State of incorporation	State sos filing number
Approved	ICFI	10-MAY-2021	(405)202-0464	0-	200 N. E. 21st Street	Oklahoma City	OK	73105	200 N. E. 21st Street	Oklahoma City	OK	73105	FRANK TEST	(405)209-536	frank.arambula@omes.ok.gov	DUNS-33	333333333	33	FL	SOS-33

1 - 1


The page is divided into 2 sections – Current Pre-Qualification Record that can be Edited and Past NonEditable Pre-Qualification Records.

Current Pre-Qualification Record that can be Edited

This section will only display the current application. This record will only appear if the application status is “Started”, “Returned by OE” or “Returned by Comp”. These are the only 3 statuses when the user can edit the record. If there is no record displayed then ODOT is working on the application or the record is not in one of those three statuses. Users cannot change the application when ODOT is working on it. From here, the user will need to click on the pencil icon, which will indicate to the system, this record will be edited.


Current Pre-Qualification Record that can be Edited

Q v Go Actions v

	Date Of Statement ↓	Application Status	Mailing Address	Mail City	Mail State	Mail Zip	Physical Address (PA)	PA City	PA State	PA Zip	Name Of Contact
	11-MAY-2021	Started	200 N. E. 21st Street	Oklahoma City	OK	73105	200 N. E. 21st Street	Oklahoma City	OK	73105	frank arambula

Once clicked, the user will be able to edit the application, by showing the following page:

Edit Prequalification Record

Date Of Statement	11-MAY-2021	
Mailing Address	200 N. E. 21st Street	
Mail City	Oklahoma City	
Mail State	OKLAHOMA ▼	
Mail Zip	73105	
Physical Address	200 N. E. 21st Street	
Physical Address City	Oklahoma City	
Physical Address State	OKLAHOMA ▼	
Physical Address Zip	73105	
Name Of Contact	frank arambula	
Contact Phone	4052020464	No DASHES. Format 9999999999.
Phone Number	4052020464	No DASHES. Format 9999999999.
Fax Number	4055555555	No DASHES. Format 9999999999.
Contact Email	frank.arambula@omes.ok.gov	
* FEIN	444444444	No DASHES. Format 9999999999.
DUNS	DUNS-44	
Num Employees Peak	4500	
State Of Incorporation	CALIFORNIA ▼	
* SOS Filing Number	SOS-44	

Although not seen here, there will be an APPLY CHANGES button on the lower right side of the page. Once the button is clicked, Step 2 – General Information, Ownership will be displayed and ready for editing. Also, after clicking on the pencil icon the user can click any step that needs to be edited. But, the pencil icon must be clicked.

General Information



Ownership

When the applicable information is completed. User will click on the Next button to display the Officers and Owners page.

CPQ – User Guide

Cancel

Ownership

Officers and Owners

Other Investors

Other Organizations

Next >

Step 2 GENERAL INFORMATION

Enter information for the Ownership

Company Name

ICFI

Name

Frank Arambula

Telephone Number

444444445

enter numbers only - 999999999 (no dashes or parenthesis)

Fax Number

enter numbers only - 999999999 (no dashes or parenthesis)

Mailing Address

200 NE 21st Street

City

Oklahoma City

State

OKLAHOMA

Zip Code

73105

Physical Address

200 NE 21st Street

Physical Address same as Mailing Address

☐

City

Oklahoma City

State

OKLAHOMA

Zip Code

73105

Name of Contact/Owner

frank arambula

E-Mail of Contact/Owner

frank.arambula@omes.ok.gov

A majority owner, as defined in Title 61 O.S. 2011 Sec. 103.8 is an entity or individual owning more than 50 percent of the company being considered for contract award.

Percent of Ownership

100

Officers and Owners

This page will include Officers Names and Titles of those having signature authority for the organization. Individuals will be added by clicking on the Add Officer button located on the right side of the page. If there are no officers with signature authority, then the check box below the label “List of Officers”

CPQ – User Guide

[Cancel](#)

Ownership

Officers and Owners

Other Investors

Other Organizations


[Next >](#)

Step 2 GENERAL INFORMATION

Enter the Officer Names and Titles of those having signature authority for the firm or click on the checkbox.

List of Officers

There are no officers with signature authority.

<div><div><div><div></div><div>Q</div><div></div></div></div><div></div></div> <div>Go</div> <div>Actions</div> <div>Add Officer</div>										
Edit	Officer name	Title	Officer Percentage	Officer status	End date	Created date	Created by	Updated date	Updated by	Effective Date
	Molly Arambula 1	Vice President	25	A	-	11-MAY-2021	ODOTFA	11-MAY-2021	ODOTFA	11-MAY-2021
1 - 1										

Clicking the Add Officer button will present the following page:

Add/Edit Officers

Officer Name

Title

President, Vice President, Secretary, Treasurer, CFO, CEO

* Officer Email

Officer Percentage

Officer Status

Effective Date

End Date

[Cancel](#)

[Create](#)

Enter the information. The textbox labeled “Title” has quick links that can be clicked. These are words that when clicked on will present themselves in the title textbox. However, the user is able to type in any title. The officers email address will be required. The Effective Date is when the person began having authority signature. The End Date is when the person no longer has authority signature. When the information has been populated in the textboxes, click on the create button to save the information. Once the button has been clicked the user will come back to the original Officers and Owners page. The list of personnel will be displayed. To edit a particular person, click on the paper and pencil icon.

CPQ – User Guide

[<](#) [Cancel](#)

Ownership

Officers and Owners

Other Investors

Other Organizations

[Next >](#)

Step 2 GENERAL INFORMATION

Enter the Officer Names and Titles of those having signature authority for the firm or click on the checkbox.

List of Officers

☐ There are no officers with signature authority.

Q ~

Go

Actions ~

Add Officer

Edit	Officer name	Title	Officer Percentage	Officer status	End date	Effective Date	Officer Email
<div><div></div><div></div></div>	Molly Arambula 1	Vice President	25	A	-	11-MAY-2021	molly@email.com
<div><div></div><div></div></div>	Andy Penney	Secretary	-	A	-	12-MAY-2021	-

When all personnel have been entered click on the Next button to arrive at the Other Investors page.

Other Investors

The users will enter other investor's names or those people having a financial interest in the organization. This page will work the same as the Officers and Owners page. However, if there are no other investors, click on the checkbox. Click the Next button to continue.

[<](#) [Cancel](#)

Ownership

Officers and Owners

Other Investors

Other Organizations

[Next >](#)

Step 2 GENERAL INFORMATION

Enter Other Investor Names or those having financial interest in the firm or click on the checkbox.

List of Officers


☐ There are no investors/firms with financial interest.

Q

Go

Actions

Add Investor

Edit	Investor name	Pct ownership	Investor status	Effective date	End date
	Rowdy Arambula	25	A	11-MAY-2021	-
1 - 1					

Other Organizations

User will enter all company principals, officers, partners or other organizations owning any part of the applicant's organization. Additional Investors can be added using the Additional Investors button and other firms that have an interest in the organization will be listed by answering the question. If there are no other parties then click the checkbox. Clicking the SAVE DATA button

will save information from all 3 previous pages. If the SAVE DATA button is not clicked you may lose the data entered on the 3 previous pages.

Progress bar with steps: Ownership (checked), Officers and Owners (checked), Other Investors (checked), Other Organizations (active), and Save Data (button).

Step 2 GENERAL INFORMATION

Enter all company principals, officers, partners, or other companies or organizations owning any part of the applicant's firm or click on the checkbox.

List of Officers

☒ There are no other parties owning the applicant's firm.

Search interface with a search bar, 'Go' button, and 'Actions' dropdown. A yellow highlight is on the 'Additional Investors' link.

Question

Does any officer, partner, or company principal of Applicant's firm have a financial interest in any/or serve as an officer, partner, or owner (in whole or in part) of any other firm prequalified to bid in this state or any other state or federal government list?

☒ No ☐ Yes

Once the information has been entered, click on the SAVE DATA button. This will take you to step 3 – Class Work Desired.

Navigation menu with options: Home, 1. Prequalification Records, 2. General Information, 3. Class Work Desired (highlighted in green), 4. Financial Stmt Guidance, and 5. Equipment List.

Class Work Desired

Clicking on Class Work Desired will present one page with all the working categories. The user will also be able to enter up to 5 different work class descriptions. When all the information has been entered, the user will click on the button at the bottom of the page. The button has the label SAVE WORK CATEGORIES.

CPQ – User Guide

Step 3 - Working Categories

Contractors can check and uncheck work categories they would like to qualify for.

Working Categories

- | | | | | |
|---|---|---|--|--|
| <input checked="" type="checkbox"/> Asphalt Paving | <input checked="" type="checkbox"/> Cable Barrier | <input checked="" type="checkbox"/> Guardrail | <input checked="" type="checkbox"/> Railroad | <input checked="" type="checkbox"/> Traffic Lighting & Signals |
| <input type="checkbox"/> Bridge Construction (Span > 20 Ft) | <input type="checkbox"/> Drainage (RCB & Culverts) | <input type="checkbox"/> ITS | <input type="checkbox"/> Small Structures (RCD, Curb&Gutter, Drives, Longitudinal Barrier, Sidewalks, etc) | <input type="checkbox"/> Traffic Safety |
| <input type="checkbox"/> Bridge Painting | <input checked="" type="checkbox"/> Earthwork, Grading and Subgrade | <input type="checkbox"/> Pavement Removal | <input type="checkbox"/> Staking/Survey | <input type="checkbox"/> Traffic Signing & Striping |
| <input type="checkbox"/> Bridge Rehabilitation and Repair | <input type="checkbox"/> Erosion and Sediment Control | <input type="checkbox"/> PC Concrete Paving | <input type="checkbox"/> Storm Sewer | <input type="checkbox"/> Trucking |
| <input type="checkbox"/> Bridge Removal | <input type="checkbox"/> Fencing | <input type="checkbox"/> Planting, Landscaping, Sitescaping | <input type="checkbox"/> Traffic Control (Construction) | <input type="checkbox"/> Utility Installation/Relocation |

Other, Please Specify

Work Class 1 Description

Work Class 2 Description

Work Class 3 Description

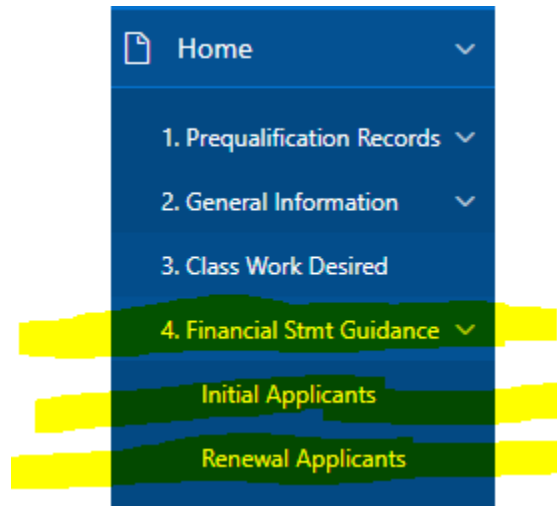
Work Class 4 Description

Work Class 5 Description

Must Click on the Button Below to
Save Work Categories

Save Work Categories

At this point, to continue, the user will need to click on the Set 4, Financial Stmt Guidance to continue.



Financial Statement Guidance

Guidance for Initial and Renewal Applicants. The system will only allow the user to upload either Initial financial Statements or Renewal financial statements. It will not allow for both types of financial statements to be uploaded.

Initial Applicants

Requirements for an initial Financial Statement:

- Year End Audited Financial Statement by a Certified Public Accountant. The audit must express an opinion with initial application. (Audit must be received by ODOT within 180 days of the year end date.)
- The applicant's fiscal year end audited financial statement shall not be dated more than 180 days prior to the date of receipt by the Department of the Prequalification application.
- Company must be on file and in good standing with the Oklahoma Secretary of State. You may contact the Secretary of State at (405)522-4563 or www.sos.ok.gov for information on how to register with their agency.

A PDF attachment can be added by clicking on the Attach Initial Fin Stmt button.

Cancel Initial Financial Statement Renewal Financial Stmt Next >

Step 4 - Initial Financial Statement

- Year End Audited Financial Statement by a Certified Public Accountant. The audit must express an opinion with initial application. (Audit must be received by ODOT within 180 days of the year end date.)
- The applicants fiscal year end audited financial statement shall not be dated more than 180 days prior to the date of receipt by the Department of the Prequalification application.
- Company must be on file and in good standing with the Oklahoma Secretary of State. You may contact the Secretary of State at (405)522-4563 or www.sos.ok.gov for information on how to register with their agency.

Q Go Actions

Attach Initial Fin Stmt

To attach the PDF file, click on the Choose File Button and navigate to where the document is stored.

CPQ – User Guide

Choose a file by clicking on the button to navigate to your file.

Enter a brief description and then click on Upload Attachment

Upload Application Attachments

Cancel

Upload Attachment

* Attachment

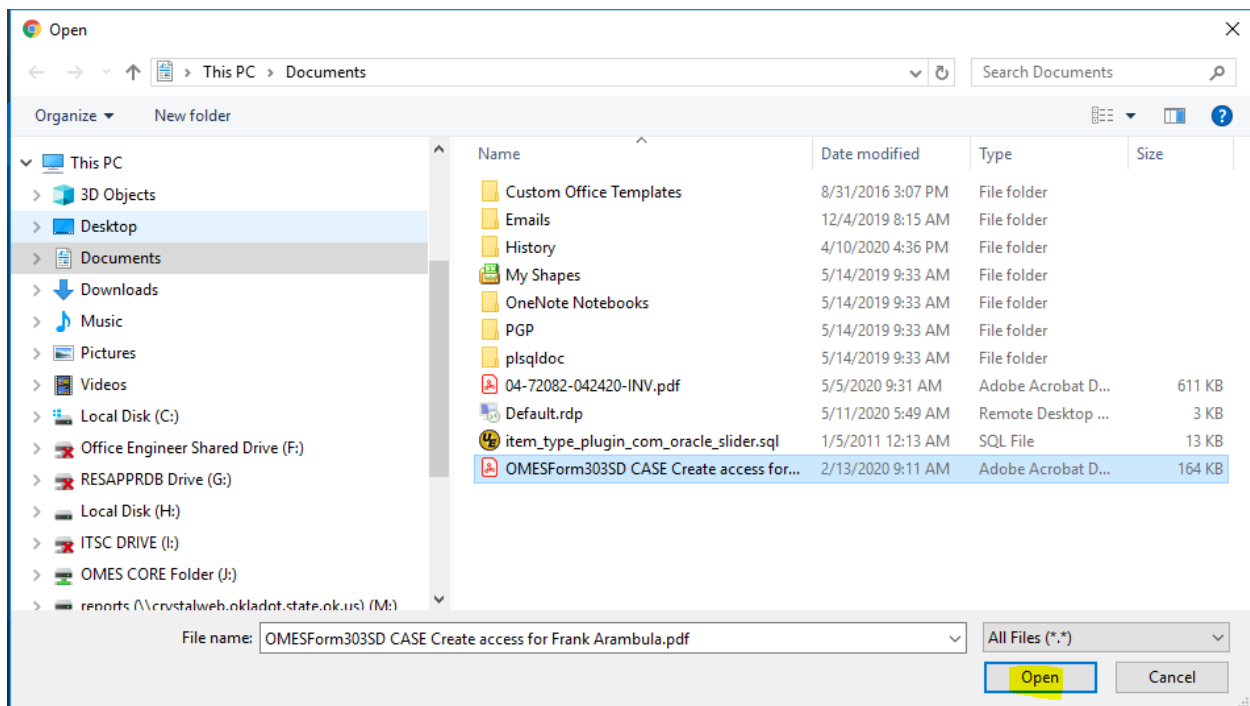
Choose File

No file chosen

* Description

* indicates required field

This will provide a pop-up window to navigate to your document. Select your document and then click open.



Next, provide a description and then click on Upload Attachment.

Choose a file by clicking on the button to navigate to your file.

Enter a brief description and then click on Upload Attachment

Upload Application Attachments

* Attachment

OMESForm30...ambula.pdf

* Description

test

* indicates required field

Renewal Applicants

Requirements for Renewal Financial Statements:

- Year End Audited Financial Statement by a Certified Public Accountant.
- Contractor Prequalification will not be renewed and prequalification status will cease if year end audit or review is over 180 days old. The renewal applicant's fiscal year end audited financial statement or review, shall not be dated more than 180 days prior to the date of receipt by the Department of the Prequalification application.
- Audited financial statements will be presented in accordance with Generally Accepted Accounting Principles (GAAP). ODOT will utilize this financial information to determine the contractor's current working capital, i.e., current assets less current liabilities. This calculation provides ODOT with an expected value of the liquid assets that are available to the contractor for working capital to complete the awarded project(s). While ODOT requires a listing of production equipment, asset items such as equipment, land, and buildings cannot be readily liquidated so as to provide the contractor with quick and available working capital. As such they will not be counted towards short term assets. This listing of production equipment is utilized by ODOT to provide a partial picture of the contractor's ability to satisfactorily perform the awarded contract in an efficient and safe manner.

A PDF attachment can be added by clicking on the Attach Renewal Fin Stmt button.

<

Cancel

✓

Initial Financial Statement

●

Renewal Financial Stmt

Save Data

Step 4 - Renewal Financial Statement

- Year End Audited Financial Statement by a Certified Public Accountant.
- Contractor Prequalification will not be renewed and prequalification status will cease if year end audit or review is over 180 days old. The renewal applicant's fiscal year end audited financial statement or review, shall not be dated more than 180 days prior to the date of receipt by the Department of the Prequalification application.
- Audited financial statements will be presented in accordance with Generally Accepted Accounting Principles (GAAP). ODOT will utilize this financial information to determine the contractor's current working capital, i.e., current assets less current liabilities. This calculation provides ODOT with an expected value of the liquid assets that are available to the contractor for working capital to complete the awarded project(s). While ODOT requires a listing of production equipment, asset items such as equipment, land, and buildings cannot be readily liquidated so as to provide the contractor with quick and available working capital. As such they will not be counted towards short term assets. This listing of production equipment is utilized by ODOT to provide a partial picture of the contractor's ability to satisfactorily perform the awarded contract in an efficient and safe manner.

NOTE: A financial review will only be accepted for the renewal of the contractors prequalification.

Q

Go

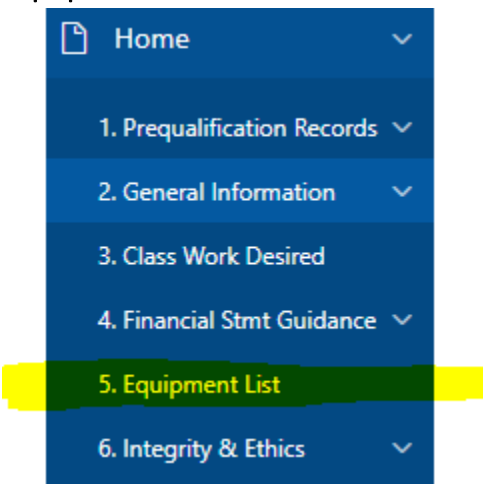
Actions

Attach Current Fin Stmt

The process to upload a PDF document is the same as the initialize Financial Statement. After a financial statement has been uploaded, user will need to click on the SAVE DATA button.

To continue, the user will need to click on Step 5, Equipment List.

Equipment List



The users will have the ability to upload a PDF document that contains a list of equipment the organization has or they can enter individual equipment or they can do both.

CPQ – User Guide

Step 5 - Equipment List

Contractor can add attachments or enter their equipment on the list below.

Attachments for Equipment List

Q ▾ Go Actions ▾ Create Attachment

Edit	Created Date	Mimetype	Filename	Last Update	Description	Attachment
	12-MAY-2021	image/jpeg	2.JPG	12-MAY-2021	test	Download
	11-MAY-2021	application/octet-stream	test.sql	11-MAY-2021	Equipment List	Download

1 - 2

List of Contractor Equipment owned that illustrates capability for class of work which you are applying for Prequalification. (DO NOT include small tools such as shovels, picks, etc.)

Q ▾ Go Actions ▾ Create Equip List

To upload a PDF document, the user can click on the Create Attachment button, which will display the following screen:

Choose a file by clicking on the button to navigate to your file.

Enter a brief description and then click on Upload Attachment

Upload Application Attachments

Cancel Upload Attachment

* Attachment Choose File No file chosen

* Description

* indicates required field

The user will click on the choose file button that will produce a pop up window that can be used to select the equipment list document. The description will need to be populated and then clicking on the upload attachment button to upload the document.

Clicking on the Create Equipment List button will display fields that the user can enter. After entering the fields then the user will click on the create button to save the information.

Add/Edit Equipment List

Equipment Desc

Equipment Age(months)

Equipment Purchase Date

Equipment Present Location

Equipment Lease Company, If Leased

Cancel Create

After entering the Equipment List, the user will need to click on Step 6 – Integrity & Ethics. This will continue the wizard.

Integrity & Ethics



The Integrity & Ethics section has 3 sub-sections.

Suspensions

All questions for suspensions must be answered, along with the textbox populated. Once the information is collected the user can click on the next button.

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Cancel **Suspensions** PreQual & Removal Bankruptcy & Status Ver Sys **Next >**

Step 6 - Integrity & Ethics
Suspensions

That, except as noted below, **test** or any person (Prospective Participant) associated therewith in the capacity of owner, partner, director, officer, principle investigator, project director, manager, auditor or accountant, project superintendent, or any person in a position involving the administration of project funds:

A. Is currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal or state agency?
Yes **No** If yes, please explain.

B. Has been suspended, debarred, voluntarily excluded or determined ineligible by any federal or state agency within the past 3 years?
Yes **No** If yes, please explain.

C. Has a proposed debarment pending?
Yes **No** If yes, please explain.

D. Has been indicted, convicted, or had a civil judgement rendered against any of the aforementioned by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years?
Yes **No** If yes, please explain.

Prequal & Removal

All questions must be answered before moving forward.

< Cancel **PreQual & Removal** Bankruptcy & Status Ver Sys **Next >**

Step 6 - Integrity & Ethics
Prequalification & Removal

A. Has your firm ever been denied prequalification from this state or any other state, or in any federal project?
Yes **No** If yes, please explain.

B. Has your firm ever been removed from approved bidders list in this state or any other state, or from the federal government list?
Yes **No** If yes, please explain.

C. Has any officer, partner, or principal of your organization been an officer, partner, or principal of some other organization that has been denied prequalification, or removed from the approved bidders list from this state or any other state, or the federal government list?
Yes **No** If yes, please explain.

Bankruptcy & SV System

Again, all questions must be answered. User can upload any PDF document needed to support the integrity & Ethics sub-section. After all questions in the sub-section have been answered the user can click on the SAVE DATA button to save all the data. The system will then default to the first sub-section of the Step 7 – Experience.

CPQ – User Guide

Step 6 - Integrity & Ethics
Bankruptcy & Status Verification System

A. Has any owner, partner, director, officer, principle investigator, project director, manager, auditor of accountant, project superintendent, or any person in a position involving the administration declared personal, or corporate bankruptcy in the past 5 years?

If yes, please explain.

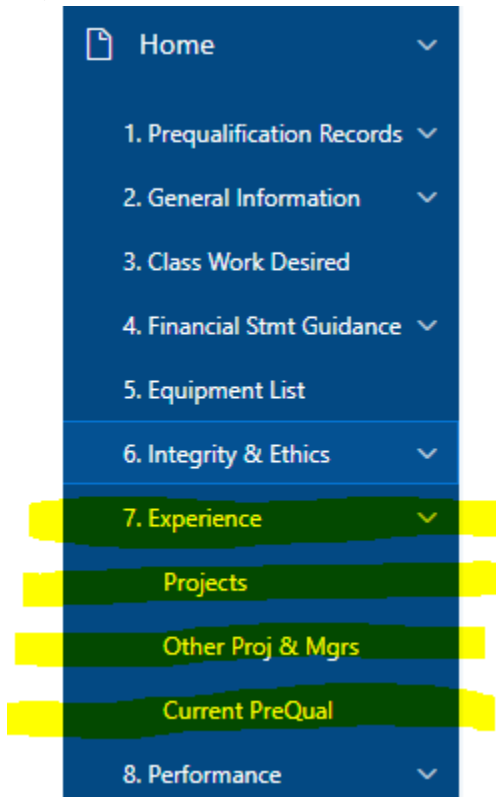
Has your firm registered with and participated in the "Status Verification System" to verify or ascertain the citizenship or immigration status, as well as the work eligibility status of all company employees?(Registration and participation is mandatory after July 1, 2008)

E-verify information can be obtained at www.uscis.gov

Upload any supporting documentation

Search: Go Actions

Experience



The Experience section has 3 sub-sections.

Projects

This page contains 2 sections: Projects and ODOT Projects. The user will need to scroll down so see the ODOT Projects. User can have a PDF document that can be attached to the application or the user can add individual projects to the page. The procedure to attach the document is the

same as before by clicking on the Create Attachment button. The same is true of adding individual projects.

If the users company does not have any Oklahoma Highway System/Federal/State Aid Projects in other states in the last two years or under progress then they can click on the check box. The user can also do the same with ODOT projects, by checking the box if no ODOT projects have been completed in the last two years or under progress.

Cancel

Projects

Other Proj & Managers

Current PreQualifications

Next >

Step 7 - Experience Projects

List projects completed on Oklahoma highway System or Federal or State Aid Projects in other states in the last two years, or under progress. (Please attach and upload a .pdf file). Must provide documentation. Do not leave blank or click on the checkbox.

☐ The company has NOT completed any Oklahoma highway System/Federal/State Aid Projects in other states in the last two years or under progress.

Q v

Go

Actions v

Create Attachment

Edit	Created Date	Mimetype	Filename	Last Update	Description	Attachment
	11-MAY-2021	application/octet-stream	test.sql	11-MAY-2021	Step 8 - Experience Projects	Download

1 - 1

Project List of Experience

Q v

Go

Actions v

Add Experience

ODOT Projects

List all other ODOT administered projects completed in the last two years, or under progress. (Please attach and upload a .pdf file)

☐ There are no ODOT administered projects completed in the last two years or under progress.

Q v

Go

Actions v

Create Attachment

Edit	Cpq app fk	Attachment Sequence	Created Date	Mimetype	Filename	Last Update	Description	Attachment
	254	1	11-MAY-2021	application/octet-stream	test.sql	11-MAY-2021	Step 8 - ODOT Projects	Download

1 - 1

List of ODOT Projects

Q v

Go

Actions v

Add ODOT Project

Other Project & Managers

This page also contains 2 sections. Other projects the organization has been involved in and Key Managers Experience. This is a long page, the user may need to scroll down. A PDF or individual items will need to be entered for the other projects and Key Managers Experience. Adding either the PDF or the individual items for each section will be required. Additionally if there is no work experience or Key Manager experience that has been performed for municipalities or other government agencies, the user can click on the check boxes.

< Cancel

✓ Projects
Other Proj & Managers
● Current PreQualifications

Next >

Step 7 - Experience Other Projects

Work performed for municipality or other government entity. (Please attach and upload a .pdf file).

☐ No work performed for municipality or other government entities.

Create Attachment

Edit	Created Date	Mimetype	Filename	Last Update	Description	Attachment
	11-MAY-2021	application/octet-stream	test.sql	11-MAY-2021	Step 8 - Experience Other Projects	Download

1 - 1

Project List of Experience

Add Experience

Key Managers Experience

List the construction experience of the key managers of your organization. (Please attach and upload a .pdf file).

☐ There is No Key Manager Experience for our organization

Create Attachment

Edit	Cpq app fk	Attachment sequence	Created Date	Mimetype	Filename	Last Update	Description	Attachment
	254	2	11-MAY-2021	application/octet-stream	test.sql	11-MAY-2021	Step 8 - Key Mgr Experience	Download

1 - 1

List Construction experience of Key Managers

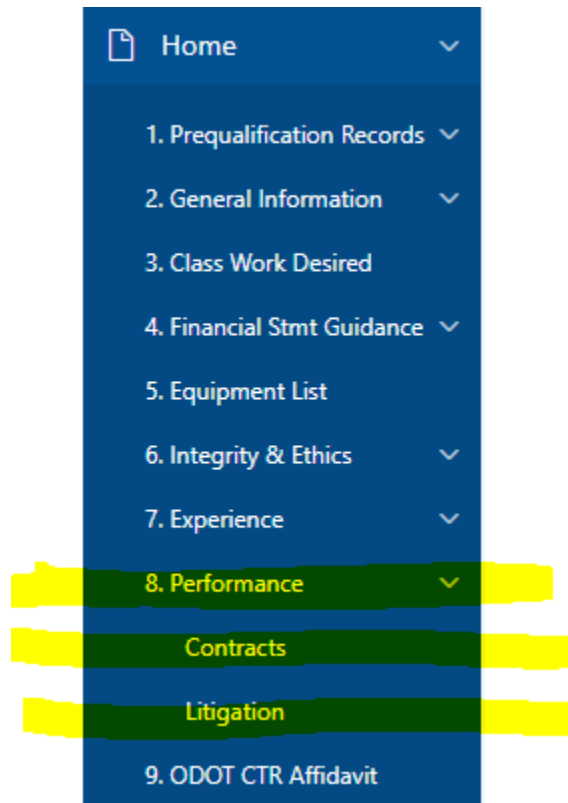
Add Key Mgrs

Current PreQualifications

Here the user will list other pre-qualifications in other states. This can be done by uploading a PDF document or by listing individual project list experiences. If there are no current Pre-Qualification in other states the user can click on the checkbox. After entering all the information the user can click the SAVE DATA button. This will take the user to Step 8 – Performance.

The screenshot displays the 'Current PreQualifications' step in a multi-step process. The top navigation bar shows four steps: 'Projects' (completed), 'Other Proj & Managers' (completed), 'Current PreQualifications' (active), and 'Save Data' (button). The main content area is titled 'Step 7 - Experience Current Prequalifications'. It contains a section 'Current Prequalification in other States. (Please attach and upload a .pdf file.)' with a checkbox labeled 'There are NO Current PreQualifications in other states.' which is checked. Below this is a search bar with a magnifying glass icon, a 'Go' button, and an 'Actions' dropdown menu. To the right of the search bar is a 'Create Attachment' button. The bottom section is titled 'Project List of Experience' and features a similar search bar with a magnifying glass icon, a 'Go' button, and an 'Actions' dropdown menu. To the right of this search bar is an 'Add PreQual' button.

Performance



This Section contains 2 sub-sections: Contacts &

Litigation.

Contracts

In this sub-section all questions need to answered. Upon completion, the user will click the next button.

Cancel Contracts Litigation Next >

Step 8 - Performance
Contracts

1. Has your firm or organization ever defaulted on a surety bond or failed to complete any work awarded to you? ☐ Yes ☐ No If yes, please explain.

2. Has any officer, partner or other affiliate of your organization ever defaulted on a surety bond or failed to complete a construction contract? ☐ Yes ☐ No If yes, please explain.

3. Has your firm or any officer, partner or other affiliate of your organization failed to complete a construction contract within the time frame allowed in the contract provisions?
☐ Yes ☐ No If yes, please explain.

Litigation

This sub-section contains 2 questions, both require an answer. It also contains the following note:

Contractor's Performance will be evaluated upon completion of project administered by ODOT. Performance ratings will be based upon completion of project in accordance with the Standard Specifications and all contract provisions, state and federal statutes, and within the time frame

specified in the contract. Failure of the contractor to perform satisfactorily, as defined in OAC 730:25-3-5(b)(1), may result in the following progressive disciplinary actions effecting the contractor's prequalification's:

- A. Suspension of prequalification for 12 months.
- B. Suspension of prequalification for up to 60 months.
- C. Permanent suspension and/or debarment for repeated violations.

Enforcement of these actions will be in accordance with OAC 730:25-35(b).

Upon completion of the questions, the user can click on the SAVE DATA button. This will take the user to the final section, Step 9 – ODOT CTR Affidavit.

[<](#)
[Cancel](#)

✔
 Contracts

●
Litigation

Save Data

Step 8 - Performance
Litigation

4. Has your firm or organization or any officer, partner, or other affiliate of your organization ever filed a formal claim against ODOT or any other public entity?

Yes
No
If yes, please explain.

5. Is your firm or organization or any officer, partner or other affiliate of your organization currently involved in litigation with ODOT or any other public entity?

Yes
No
If yes, please explain.

Note

Contractor's Performance will be evaluated upon completion of project administered by ODOT. Performance ratings will be based upon completion of project in accordance with the Standard Specifications and all contract provisions, state and federal statutes, and within the time frame specified in the contract. Failure of the contractor to perform satisfactorily, as defined in OAC 730:25-3-5(b)(1), may result in the following progressive disciplinary actions effecting the contractor's prequalification's:

- A. Suspension of prequalification for 12 months.
- B. Suspension of prequalification for up to 60 months.
- C. Permanent suspension and/or debarment for repeated violations.

Enforcement of these actions will be in accordance with OAC 730:25-35(b).

Prequalification Certification Statement

This page has 3 individual boxes. The first box titled Instructions, ask the user to print the ODOT Contractor Prequalification Certificate. The user can click on the words ODOT Contractor Prequal Cert. This will produce the Contractor Prequalification Certificate in another tab, where the user will be able to print the document. Once the document is printed, please complete the document and scan it. The document will need to be uploaded using the Attach Cert Letter button found in the second box. Upon completion of the scan the document will need to be attached to the application. The Contractor Prequalification Certification will look like the following:

OKLAHOMA DEPARTMENT OF TRANSPORTATION CONTRACTOR PREQUALIFICATION CERTIFICATION

Name of Organization _____

I, _____ certify the answers to the forgoing questions and all statements therein contained are true and correct. I further understand that any false, deceptive, or fraudulent statements made in this application are cause for disqualification as a bidder by the Oklahoma Department of Transportation. I further attest that I have read and understand the Oklahoma Administrative Code 730:25.

Signature _____

Date _____

This certification may be executed in counterparts, including by means of facsimile or electronic signature page, any of which needs not contain the signature of more than one party, and each of which shall be deemed an original, but all of which shall constitute one and the same instrument.

The last section will display what is currently missing with the application. When the missing information is completed the submit my application button will appear.

Step 9 – ODOT CTR Affidavit Instructions

Please print the form.

ODOT Contractor PreQual Cert

Fill out the form and Scan the form for upload to your application.

Q Go Actions

Attach Cert Letter

What is missing to submit application.

No attachment for Financial Statement.
No ODOT Contractor Prequalification certificate found.

The Prequal Cert Statement will look like the following when there is no missing information, the contractor prequalification certification has been uploaded and the submit application button appears.


CPQ – User Guide

Instructions

Please print the form.
[ODOT Contractor PreQual Cert](#)

Fill out the form and Scan the form for upload to your application.

Q Go Actions Attach Cert Letter

Edit	FileName	Last Update	FileType	Attachment	Created Date
	OMESForm301SD CASE Create access for Frank Arambula.pdf	12-MAY-2020	application/pdf	Download	12-MAY-2020

1 - 1

What is missing to submit application

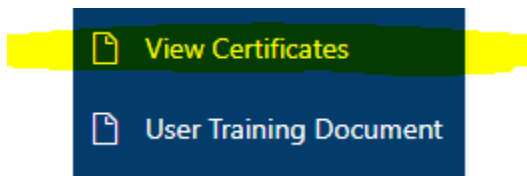
No Errors

Submit Application


If there are any questions regarding the flow of the system please email Frank Arambula at frank.arambula@omes.ok.gov.

If there are any questions regarding what type of information is required in the application please contact Andy Penney at apenney@odot.org.

View Certificates



Clicking on the View Certificates link will display the following page:

Company Name	Date Of Statement	Date Of Financial Audit	Application Status	CPQ Cert	App Status Date	Company phone	Company Fax Number	Mailing Address	Mail City	Mail State	Mail Zip	Physical Address	Physical City	Physical State	Physical Zip	Name Of Contact	Contact Phone	Contact Email	Duns Number
ICFI	11-MAY-2021	-	Started		11-MAY-2021	405.202.0464	4055555555	200 N. E. 21st Street	Oklahoma City	OK	73105	200 N. E. 21st Street	Oklahoma City	OK	73105	frank.arambula	4052020464	frank.arambula@omes.ok.gov	DUNS-44

If there are applications with an approved status, then under the column header CPQ Cert will appear the word Cert. It will be a link to the certificate. As seen below.



**STATE OF OKLAHOMA
DEPARTMENT OF TRANSPORTATION
CONTRACTOR'S CERTIFICATE OF PREQUALIFICATION**

VENDOR NO.: [REDACTED]

Name: [REDACTED]

In accordance with The Oklahoma Administrative Code, Section 730:25-3-1, Prequalification, you are hereby notified that the following Rating and Classifications have been assigned to you by the Office Engineer Division.

MAXIMUM BIDDING LIMIT: [REDACTED]

WORK CLASSIFICATION(S):

Bridge Painting, Traffic Signing and Striping

PREQUALIFICATION STATUS: Conditionally

THIS RATING and CLASSIFICATION will expire: December 31, 2022

Approval Date: March 01, 2021

A handwritten signature in blue ink, appearing to read "S. Taylor". The signature is written in a cursive, flowing style.

Chief Engineer