# Step-by-Step Instructions

For Site Managers to Create a Performance Evaluation

- 1. Log in to STCM and click Storage Tank Contamination Monitoring.
- 2. Navigate to: Cleanup -> Workorder -> Work Order -> Performance Evaluation (Fig. 1).

| ADmin Compliance    | CLeanup COdes Registration Search/Query   | STatistics RePorts Help Exit Window  |
|---------------------|---|--|
| 🙀 Storage Tank/Cont | Discharge Information   | >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>  |
|                     | Workorder   | Work Order Data Entry  |
|                     | Imminent Threat<br>Cleanup Site Manager Assignment<br>Program Application and Eligibility Data Entry<br>PCT Accounting<br>Delete/Move Discharge Records<br>Discharge Score Entry<br>Facility Cap and Deductible Information<br>PAC Ceiling<br>PCPP Discharge Ceiling<br>Ineligible Facilities and Reason(s)<br>Partially Eligible Facilities and Reason(s)<br>Pending Program Applications and Reason(s)<br>History<br>PCT Conversion Exceptions<br>Reference Codes<br>Search and Query<br>Tasks<br>PCT Contractor Information<br>Technical Document Review<br>NPDES Invoices | Invoices<br>Jasks<br>Deliv Histories<br>Codes<br>Budtrack Data Cleanup<br>Eacility and Work Order RAI<br>Comments<br>ITS Facilities<br>LSA<br>RePorts<br>Mination Tracking |

Figure 1

On the Contractor Performance Evaluation (CPE) screen...

- 3. Select the evaluation type, either "Completion" or "Interim" (Fig. 2, in green).
- 4. Enter PO or TA/WO number\*, then press Tab (Fig. 2, in yellow). This will auto-fill many fields on the CPE screen.
- 5. Edit/enter the following information where necessary; editable fields are displayed as white (Fig. 2):
  - Task Numbers if interim evaluation
  - Evaluation Period End
  - Description of Work Performed
  - Evaluator\*
  - Title of Owner/RP Completed Survey
  - Property Owner, Facility Owner, and/or Responsible Party
  - Survey Completion Representative / Date if survey was completed
  - Owner Not Responded to Survey if survey was not completed/no response (this automatically enters "NA" into all Survey Questionnaire fields)
- 6. Click "Load CPE and Survey Questionnaire" (Fig. 2, red arrow). This will load the CPE and Survey questions.

| Storage Tank/Contamination Trackin | g - Contractor Perform          | ance Evaluation (CPE)                      |  |
|------------------------------------|---------------------------------|--|--|
|                                    |                                 | Contractor Name                            | Cancelled / Date   |
| Completion     Interim             |                                 |  | Download   |
| Contract No. Purchase Order        | TA/WO*                          | Task Numbers Evalua                        | ation Period Start Evaluation Period End County / Facility ID                          |
|                                    | Facility Name and               | Address                                    | Description of Work Performed  |
|                                    |                                 |  |  |
| Evaluator                          | Team/LP                         | Position Title                             | Evaluator Signature / Date Admin Signature / Date                                      |
| Title of Owner/RP Completed Survey | Property Faclity<br>Owner Owner | Responsible Survey Com<br>Party Representa | pletion Owner Not Responded<br>tive / Date to Survey Load CPE and Survey Questionnaire |

Figure 2

### 7. Enter the values for the CPE and Survey Questionnaire evaluations in the appropriate fields\* (Fig. 3).

| te of Owner/RP Completed Survey     | Property<br>Owner | Faclity<br>Owner                     | Responsible<br>Party   | Survey Completion<br>Representative / Date   | Owner Not Respond<br>to Survey                                      | fed                     |            |         |
|-------------------------------------|-------------------|--------------------------------------|--|--|---|-------------------------|------------|---------|
| Mr. Owner                           | ~                 |                                      |  |  |   | Load CPE and Survey Que | stionnaire |         |
| Sub Section Name                    | Question          | n #                                  | Contractor P   | erformance Evaluation Questi<br>escription   | onnaire   |                         | Evaluation |         |
| Quality and Technical Competence    | C                 | The contr<br>or freque<br>(Consiste  | actor proposed appr<br>ncy based on changi<br>ntly = 2, Minor chang        | opriate changes to monitoring poing site conditions.<br>es missed/not proposed = 1, Char                         | ints, parameters, and/<br>nges were not proposed                    |                         | 1          |         |
| Quality and Technical Competence    | d                 | The reme<br>provided<br>site rehat   | dial action plan adeq<br>a viable remedial des<br>pilitation goals in rule | uately and cost effectively address<br>sign and did not exceed what was<br>is and applicable program guidanc     | sed the site conditions,<br>necessary to meet the<br>e.             |                         | 1          |         |
| Quality and Technical Competence    | e                 | The contr<br>remedial<br>(Consiste   | actor implemented r<br>action plan, rules and<br>ntly = 2, Limited imp     | emedial action in accordance with<br>d applicable program guidance.<br>lementation concerns, all resolved        | the approved<br>I = 1, Implementation not i                         | in                      | 1          |         |
| Quality and Technical Competence    | f                 | The contr<br>program<br>(Yes = 2, 0  | actor proposed site<br>guidance were met.<br>Only after prompting          | closure when the closure criteria<br>by Department = 1, Site closure w   | in rules and applicable<br>as not proposed even tho                 | ugh                     | 1          | •       |
|                                     |                   |                                      |  | Survey Questionnaire   |   |                         |            |         |
| Sub Section Name                    | Question          | n #                                  |  | Description  |   |                         | Evaluation |         |
| Contractor Performance Evaluation S | Su 1              | The contr<br>(Consiste               | actor did a good job<br>ntly good = 2, Some                                | communicating general project de<br>concerns = 1, No communications  | tails, schedules, status ar<br>= 0)                                 | nd reports.             | NA         | <b></b> |
| Contractor Performance Evaluation S | Su 2              | The contr<br>(Timely ne              | actor provided suffic<br>otices = 2, Some unti                             | cient notice of on-site activities rel<br>mely notices = 1, No notices for or                                    | ated to assessment or cle<br>a-site activities = 0)                 | eanup.                  | NA         |         |
| Contractor Performance Evaluation S | Su 3              | The contr<br>ingress a<br>(Good over | actor effectively ove<br>nd egress and minin<br>ersight/coordination       | rsaw and coordinated on-site wor<br>nize disruption to facility operation<br>= 2. Some limited disruptions = 1.0 | k to maintain reasonable<br>and use.<br>Operation/use impacted =    | 0)                      | NA         | -       |
| Contractor Performance Evaluation S | Su 4              | The contrast                         | actor and subcontrace<br>equipment, facility or<br>consistently follow     | ctors appeared to follow reasonab<br>ccupants, vehicle traffic and the ge<br>ed = 2. Protocols inconsistently fo | le safety protocols for the<br>neral public.<br>Nowed = 1 Failed to | eir                     | NA         |         |
|                                     |                   |                                      |  | Documentation  |   |                         |            |         |
|                                     |                   |                                      |  |  |   |                         |            |         |

Figure 3

- 8. Enter comments into the Documentation fields.
- 9. **Enter information** related to how the Owner RP data was collected into the Documentation Field for Contractor Performance Evaluation Survey.
- 10. **Review and Save** your responses. STCM will calculate ratings in "Section Ratings" at the bottom of the screen (*Fig. 4*).

|  | Sec  | tion Ratings                                  |                    |                  |    |  |  |
|--|--|---|--------------------|------------------|----|--|--|
| Performance Rating and Rankim<br>The Performance Rating outlined bel<br>if a PO Completion Performance Eval<br>Note, if any of the performance cate<br>(i.e. Owner/RP hput does not apply<br>it should be omitted and the weight f | 32.<br>ow is based on the corresponding contractor rating detuision, the attached Site Owner/ Responsible Party Congories do not apply to a specific evaluation<br>to the Task Completion Evaluation, actor for the remaining categories adjusted proportionat<br>actor for the remaining categories adjusted proportionat | ails in Section II<br>tractor Perform<br>ely. | and,<br>ance Surve | ty.              |    | Ranking<br>Top Performer:<br>Good Performer:<br>Marginal Performer | Overall Weighted Rating of > 1.5 to 2.0<br>Overall Weighted Rating of > 1.0 to 1.5<br>(with no "0" un-weighted ratings)<br>:: Overall Weighted Rating of > 0.5 to 1.0<br>(with no "0" un-weighted ratings) |
|  | Performance Category   | Rating  | Weight<br>Factor   | Weight<br>Rating | ed | Poor Performer.  | (0.5 or any "0" un-weighted ratings)   |
|  | Project Timeliness   | 1.00  | 10.00%             | 0.10             |    |  |  |
|  | Invoicing  | 1.00  | 15.00%             | 0.15             |    |  |  |
|  | Reports  | 1.00  | 15.00%             | 0.15             |    |  |  |
|  | Communication  | 1.00  | 10.00%             | 0.10             |    |  |  |
|  | Cost Control   | 1.00  | 15.00%             | 0.15             |    |  |  |
|  | Quality and Technical Competence   | 1.00  | 25.00%             | 0.25             |    |  |  |
|  | Owner/RP Input   | NA  | 10.00%             | NA               | -  |  |  |
|  | Overall PE Rating 1 Performan  | nce Ranking                                   | Margin             | al               |    |  |  |
|  |  |   |                    |                  |    |  |  |

Figure 4

- 11. **Check "Evaluator Signature"** when complete (*Fig. 2, in blue*). <u>Review the CPE data carefully before</u> signing.
- 12. Click "Save" to save "Evaluator Signature" before downloading the CPE data.
- 13. After Evaluator Signature is checked, **click "Download"** to open a webpage with the CPE data for review prior to Admin Signature approval.
- \* To view acceptable field values, press Ctrl+L while the field is selected.

### For Team/LP leaders

Once a CPE has been signed by the site manager/evaluator...

- 14. **Save** on your computer a copy of the Performance Evaluation and Owner RP Survey Download Template. The template has been provided to Team Leaders that perform Evaluation Approvals. Contact the ATC Contracts Administrator for template if needed.
- 15. Log in to STCM and navigate to the CPE (seen in "Finding a Saved CPE" below).
- 16. **Review** the CPE.
- 17. If approved, check the box left of "Admin Signature/Date" (Fig. 5, in purple).
- 18. Click "Save" to save the "Admin Signature" before downloading the CPE data.

|                    | CID   |  | C  | ontractor Name   |  | Cancelled / Date  |  |   |  |
|--------------------|---|--|--|--|--|---|--|---|--|
| Interim            | 00600   | MDM SER  | VICES, INC.  |  |  |   |  | Download  | -  |
| Purchase Order     | TAN   | VO*  | Task Numbers   | Evaluation Perio   | d Start  | Evaluation Period End Cou   | nty / Facility ID  |   |  |
| AC2F86             | GC820-007   | 28   |  | 03/11/2015   |  | 06/27/2016 17   | 8733793  |   |  |
|                    | Facility  | Name and i   | Address  |  |  | Description of We   | ork Performed  |   |  |
| Y-BRENT VOL FIRE D | EPT (400 RC   | SALYN WA   | Y, PENSACOLA 32505)  |  | SA - WAS   | с   |  |   |  |
| luator             | Tean  | n/LP   | Po   | sition Title   | Evalu  | ator Signature / Date   | Admin Signatu  | re / Date   |  |
|                    |   |  |  |  |  | 06/27/2016  |  |   |  |
| Completed Survey   | Property<br>Owner   | Faclity<br>Owner   | Responsible<br>Party   | Survey Completion<br>Representative / Date   |  | Owner Not Responded   |  |   |  |
|                    | C Interim<br>Purchase Order<br>AC2F86<br>Y-BRENT VOL FIRE D<br>Iuator | CINTERIM 00600 Purchase Order TAV AC2F86 GC820.002 Facility I Y-BRENT VOL FIRE DEPT (400 RC luator Team Completed Survey Owner | CInterim 00600 MDM SER<br>Purchase Order TAWO*<br>AC2F86 GC820-0028<br>Facility Name and //<br>Y-BRENT VOL FIRE DEPT (400 ROSALYN WA<br>luator Team/LP<br>Completed Survey Owner Owner | C Interim 00660 MDM SERVICES, INC. Purchase Order TAWO* Task Numbers AC2F86 GC820-0028 Facility Name and Address Y-BRENT VOL FIRE DEPT (400 ROSALYII WAY, PENSACOLA 32505) Iuator Team/LP Po Completed Survey Owner Davidy | Contraction Voltage Contraction Value Contraction Value Valu | Contraction Value Contraction | Completed Survey Owner Owner Compactor Party Facility Responsible Survey Completion Outer Control of Control Contrect Control Control Control Control Control Contrect | Completed Survey Owner Owner Owner Party Facility Responsible Survey Completion Owner Not Responded | Completed Survey Owner O |

- 19. Click "Download" (Fig. 5, red arrow) to download the CPE data in a spreadsheet.
- 20. Choose Save As and save the document in a location with a name you can retrieve.
- 21. **Open** a new, blank copy of the Performance Evaluation and Owner RP Survey Download Template saved in step 14. Enable Editing and Content if needed.

Figure 5

#### 22. Click "Import Eval Data"

- 23. Navigate to the CPE Download file saved in step 19 and click Open.
- 24. **Review** the data in the form to assure it is correct.
- 25. **Click "Export & Email"** and Save in a designated folder of your choosing to create a PDF version of the completed form. An email with the PDF form attached will pop up. If the email does not pop up look to see if the email provider is flashing on your taskbar.
- 26. Review and send the email.
- 27. **Insert** the PDF form into Oculus.

\* **Troubleshooting** email. If the PDF does not size the document appropriately, open the excel template and change No Scaling to **Fit All Columns** on one page.

### Finding a Saved CPE

- Log in to STCM and navigate to: Cleanup -> Workorder -> Work Order -> Performance Evaluation (Fig. 1).
- 2. On the CPE screen, click "Enter Query" (Fig. 6, red arrow) or press F11.

| Action Edit Query Block Record Fie    | ld <u>H</u> elp <u>W</u> indow |                        |
|---------------------------------------|--------------------------------|------------------------|
|                                       | • • • • •                      | ) 🖄 🌂 😒 🤶 🔪            |
| n Storage Tank/Contamination Tracking | - Contractor Perform           | nance Evaluation (CPE) |
| Completion                            |                                | Contracto              |
| Contract No. Purchase Order           | TA/WO*                         | Task Numbers           |
|                                       | Facility Name and              | d Address              |
| Evaluator                             | Team/LP                        | Position Tr            |

Figure 6

- 3. Enter PO or TA number.
- 4. Click "Execute Query" (Fig. 6, green arrow) or press F12.

### Cancelling a CPE

- 1. On the CPE screen, check "Cancelled" (Fig. 7, red arrow).
- 2. A warning message will pop up. Click "Yes" to cancel (Fig. 7, green arrow).

|                                   |                     | CID               |   | с  | ontractor N   | ame   |                                    |                          | Cancelled / [ | Date      |               |                    |
|-----------------------------------|---------------------|-------------------|---|--|---|---|------------------------------------|--------------------------|---------------|-----------|---------------|--------------------|
| Completion                        | OInterim            | 00600             | MDM SER                                 | RVICES, INC.   |   |   |                                    |                          |               |           |               | Download           |
| Contract No.                      | Purchase Order      | TAA               | NO*                                     | Task Numbers   |   | Evaluation Peri   | od Start                           | Evaluation               | n Period End  | County    | / Facility ID |                    |
| GC820                             | AC2F86              | GC820-00          | 2B                                      |  |   | 03/11/2015  |                                    | 06/27/201                | 6             | 17        | 8733793       |                    |
|                                   |                     | Facility          | Name and                                | Address  |   |   |                                    |                          | Description   | of Work   | Performed     |                    |
| ESCAMBIA CN                       | TY-BRENT VOL FIRE D | EPT (400 R        | DSALYN WA                               | Y, PENSACOLA 32505)  |   |   | SA - WAS                           | SC                       |               |           |               |                    |
| Eva                               | aluator             | Tear              | n/LP                                    | Po   | sition Title  |   | Eval                               | uator Signa              | ature / Date  |           | Admin Sigr    | nature / Date      |
| TRAIN1                            |                     |                   |   |  |   |   |                                    | 06/27/2                  | 2016          |           |               |                    |
| itle of Owner/Rf                  | Completed Survey    | Property<br>Owner | Faclity<br>Owner                        | Responsible<br>Party   | Surve   | y Completion<br>esentative / Date                                     |                                    | Owner<br>to Surv         | Not Respon    | ded       |               |                    |
| Mr. Owner                         |                     |                   |   |  |   |   |                                    | to Sulv                  | °' 🗹          | Load      | CPE and Sur   | vey Questionnaire  |
| Sub Section Na<br>Project Timelir | ness                | Questio           | n #<br>Excepting<br>were con<br>(Always | D<br>P<br>g for circumstances b<br>mpleted on time or ah<br>= 2, < 3 weeks late = 1, | escription<br>lease enter<br>eyond the c<br>ead of the s<br>= 3 weeks | NA if the item is<br>contractor's cor<br>schedule in the<br>late = 0) | s not app<br>ntrol, task<br>PO.    | licable.<br>is and deliv | verables      |           |               | Evaluation         |
| Project Timelin                   | ICSS                | b                 | Notices of<br>applicabl<br>(Consist     | of upcoming field work<br>le rules.<br>ently = 2, All provided l                     | k were prov   | vided within the<br>I work, but som                                   | time fra                           | me<br>Hy I               | •             |           |               | ×                  |
| Project Timelin                   | less                | c                 | Contract<br>timefram<br>(Consist        | or responses to Depar<br>nes stipulated in the re<br>ently = 2, Some untime          | rtment con<br>eview/requ<br>ely respons                               | nments and req<br>est and program<br>ses, but timely r                | juests we<br>n guidand<br>requests | ere<br>ce.<br>for        | <u>•</u> '    | Jo you re | ally want to  | cancel the record? |
| Invoicing                         |                     | a                 | The cont<br>informat                    | ractor's invoices were<br>ion and backup docum                                       | e correct, a<br>pentation in  | ccurate, and con<br>accordance with                                   | ntained al<br>th the cor           | ll re<br>htra            |               |           |               | Yes No             |

Figure 7

## Finding Reports for Performance Evaluations in STCM

- 1. Log in to STCM and click Storage Tank Contamination Monitoring.
- 2. **Select "Reports"** at the top of the screen (*Fig. 8, green arrow*). This will open up the STCM Report Menu in your web browser.



Figure 8

3. Click "Contamination Data Reports" (*Fig. 9, yellow arrow*). On the next page, click "Contractors" (*Fig. 10, red arrow*).

| Storage Tanks &<br>Contamination<br>Monitoring Information   |   | DEPARTMENT OF<br>Environmental protection |
|--|---|---|
|  | lorida Department of Environmental Protection |   |
|  | Storage Tanks/Contamination Monitoring        |   |
|  | Report Menu                                   |   |
| Accounting Data Reports     FIRST Compliance Reports Portal     Compliance Data Reports     Contamination Data Reports     Registration Data Reports     Tank Office Reports |   |   |

Figure 9

| ontamination                              |                                | DEPARTMENT OF<br>ENVIRONMENTAL PROTECTIO |
|---|--------------------------------|--|
| M Data Entry   Main Report Menu           |                                |  |
|   | Storage Tank Monitoring (STCM) |  |
|   | Contamination Tracking Reports |  |
| . Cap, Deductible, Co-Pay, Score and Rank |                                |  |
| 2. <u>Contractors</u>                     |                                |  |
| . <u>Deliverables</u>                     |                                |  |
| Eligibility                               |                                |  |
| Invoices                                  |                                |  |
| Master STCM Codes List                    |                                |  |

Figure 10

- 4. At the bottom of the next page (Fig. 11), you can select either of the following reports:
  - **Contractor Performance Evaluation for Approval** This report identifies work orders and task assignments that have been started and show if they have or have not been approved by an administrator. Date range based on evaluation period start date (WO return date) can be used to limit record set. (See Fig. 11, in green.)
  - **Contractor Performance Evaluation Status** This report identifies work orders and task assignments that require a Contractor Performance Evaluation. The report is limited to WO or TA with a paid in full date after 4-6-16. (*See Fig. 11, in blue.*)

| _     |  | <b>Annual State</b>  |
|-------|--|--|
| 8.    | Contractor Preapproval Information Detail Status Report*<br>This report provides a comprehensive overview of information,<br>sorted by Cleanup Contractor, related to Preapproval Cleanup Work Orders & Task Assignments.<br>You can view a Work Order's associated Deliverables and Invoices.<br>You can also see a representation of the most recent review status and disposition of both,<br>the deliverables and the invoices for payment. Currently, this report is designed to<br>include information related only to Work Orders & Task Assignments issued since FY 2003-2004 and forward.<br>Note: For a better understanding of the meaning of the data included, please click on the<br>Report Definitions link located on this report's main page. |  |
|       | report of minimuted minimuted on the report of himining ages   |  |
| 9.    | Contractor Encumbrance Balance for RCI Calculations*<br>This report provides contractor encumbrance balances that will be used<br>for calculating the Relative Capacity Index (RCI).<br>The encumbrance balance excludes work orders with an RCI Exclusion flag.<br>The encumbrance balance includes change orders associated to involces<br>with a CO (Change Order) involce action.  | I  |
| 10.   | Contractor Performance Evaluation for Approval <sup>*</sup><br>This report identifies work orders and task assignments that have<br>been started and show if they have or have not been approved by<br>an administrator. Date range based on evaluation period<br>start date (WO return date) can be used to limit record set.   | I  |
| 11.   | Contractor Performance Evaluation Status <sup>*</sup><br>This report identifies work orders and task assignments<br>that require a Contractor Performance Evaluation.<br>The report is limited to WO or TA with a paid in full date<br>after 4-6-16.   |  |
| 12    | Eulit  |  |
| 12.   | LAIL   | ~  |
| http: | x//fidep.dep.state.fl.us/stcm/STCM_Reports/Encumbrance_Balance_P.asp   |  |
| -     |  | The second value of the se |

Figure 11