

Petroleum Restoration Program CPE Guidance

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*).

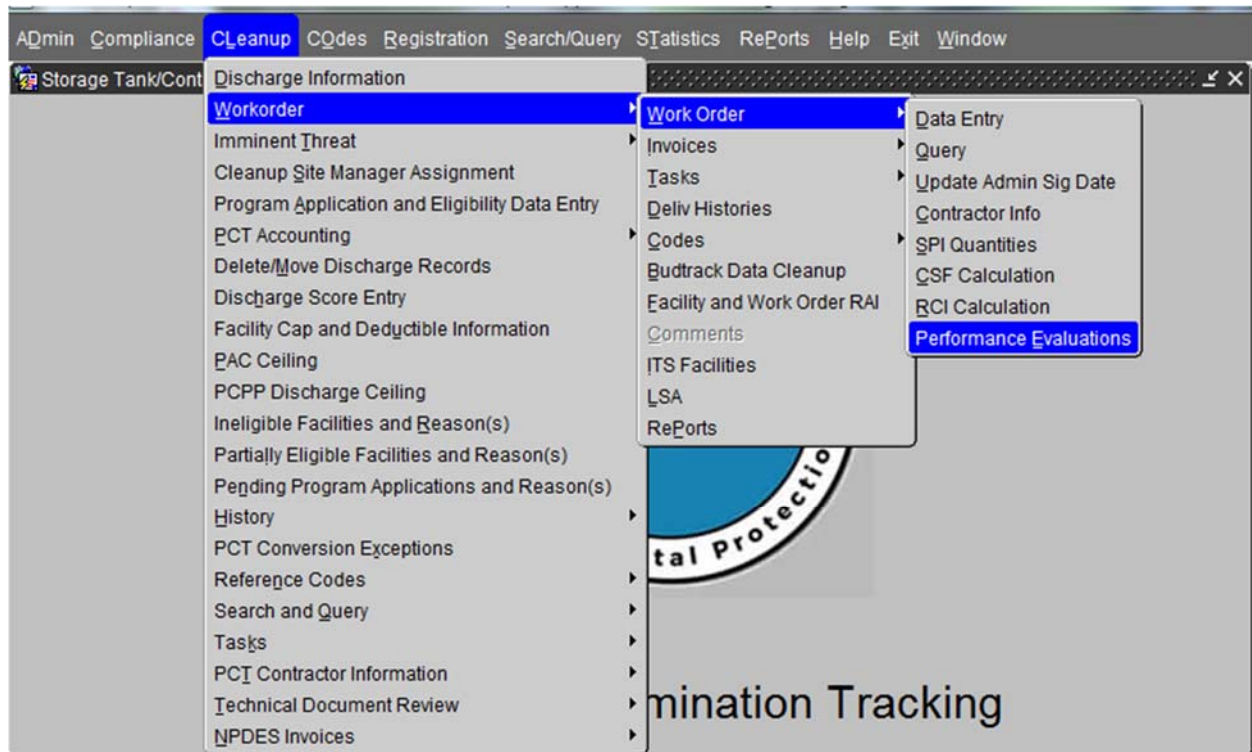


Figure 1

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.

Petroleum Restoration Program CPE Guidance

Figure 2

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

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).

Petroleum Restoration Program CPE Guidance

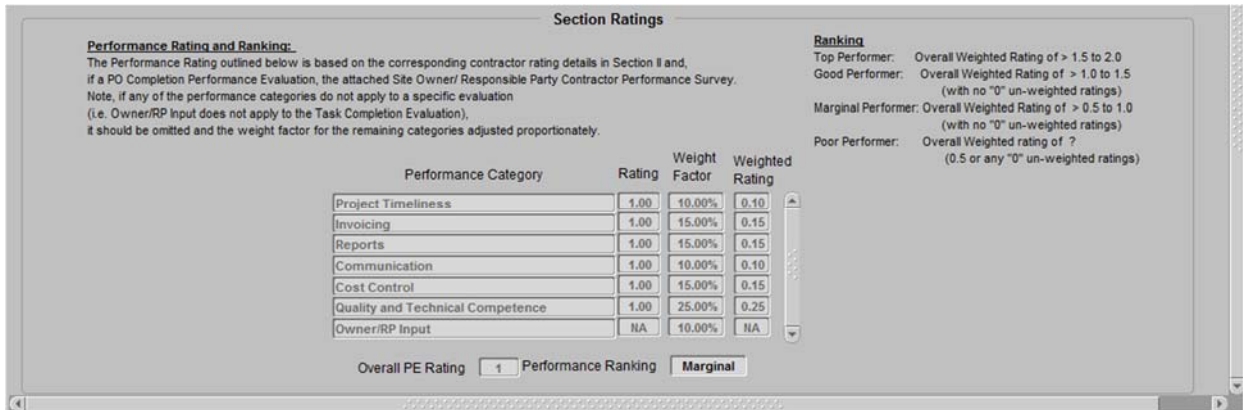


Figure 4

11. **Check “Evaluator Signature”** when complete (Fig. 2, in blue). Review the CPE data carefully before 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.

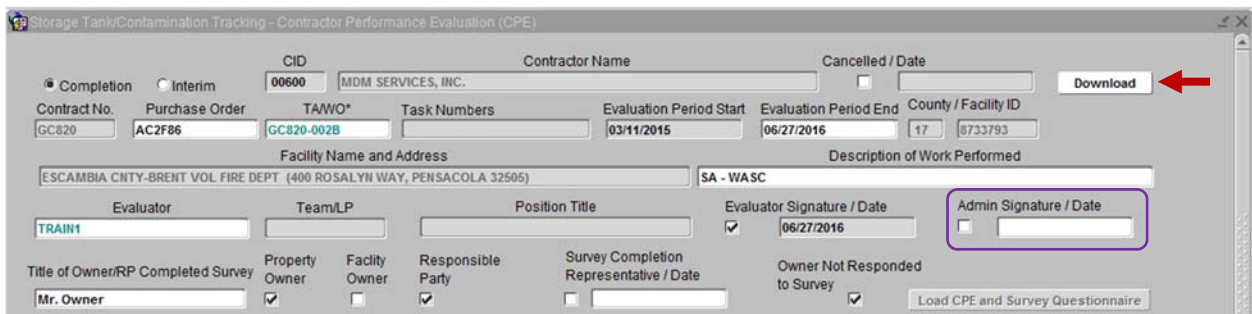


Figure 5

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.

Petroleum Restoration Program CPE Guidance

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

1. **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**.

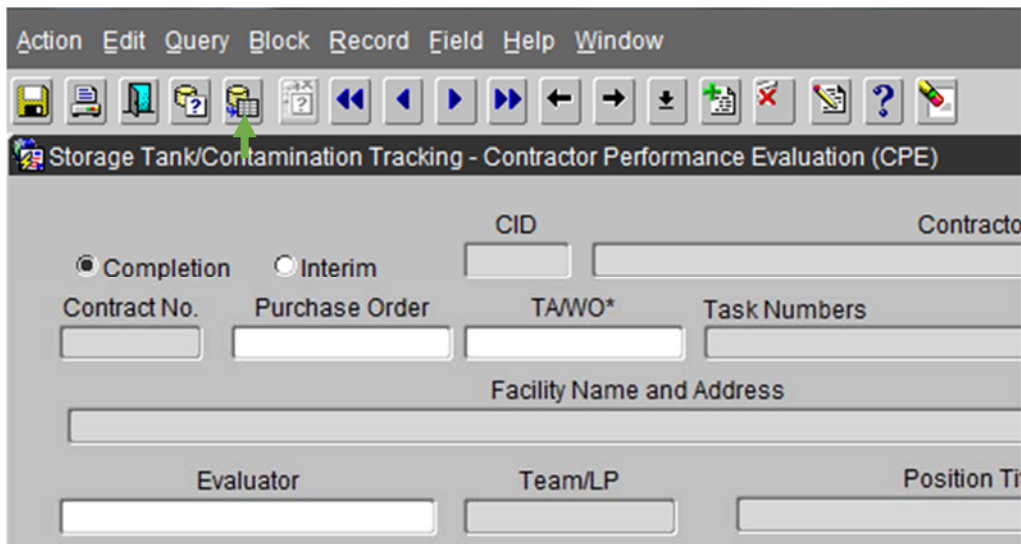


Figure 6

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).

Petroleum Restoration Program CPE Guidance

Storage Tank/Contamination Tracking - Contractor Performance Evaluation (CPE)

Completion: Completion Interim
CID: 00600 Contractor Name: MDM SERVICES, INC. Cancelled / Date:
Contract No: GC820 Purchase Order: AC2F86 TAWO*: GC820-002B Task Numbers: Evaluation Period Start: 03/11/2015 Evaluation Period End: 06/27/2016 County / Facility ID: 17 8733793
Facility Name and Address: ESCAMBIA CNTY-BRENT VOL FIRE DEPT (400 ROSALYN WAY, PENSACOLA 32505) Description of Work Performed: SA - WASC
Evaluator: TRAINH TeamLP: Position Title: Evaluator Signature / Date: 06/27/2016 Admin Signature / Date:
Title of Owner/Party Completed Survey: Mr. Owner Property Owner: Facility Owner: Responsible Party: Survey Completion Representative / Date: Owner Not Responded to Survey:
Contractor Performance Evaluation Questionnaire
Sub Section Name: Question # Description Evaluation
Project Timeliness a Excepting for circumstances beyond the contractor's control, tasks and deliverables were completed on time or ahead of the schedule in the PO. (Always = 2, < 3 weeks late = 1, = 3 weeks late = 0) 1
Project Timeliness b Notices of upcoming field work were provided within the time frame applicable rules. (Consistently = 2, All provided before field work, but some untimely responses = 1, No notices = 0) 1
Project Timeliness c Contractor responses to Department comments and requests were completed within the timeframes stipulated in the review/request and program guidance. (Consistently = 2, Some untimely responses, but timely requests for clarification = 1, No responses = 0) 1
Invoicing a The contractor's invoices were correct, accurate, and contained all required information and backup documentation in accordance with the contract and applicable program guidance. 1

Forms: Do you really want to cancel the record? 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.

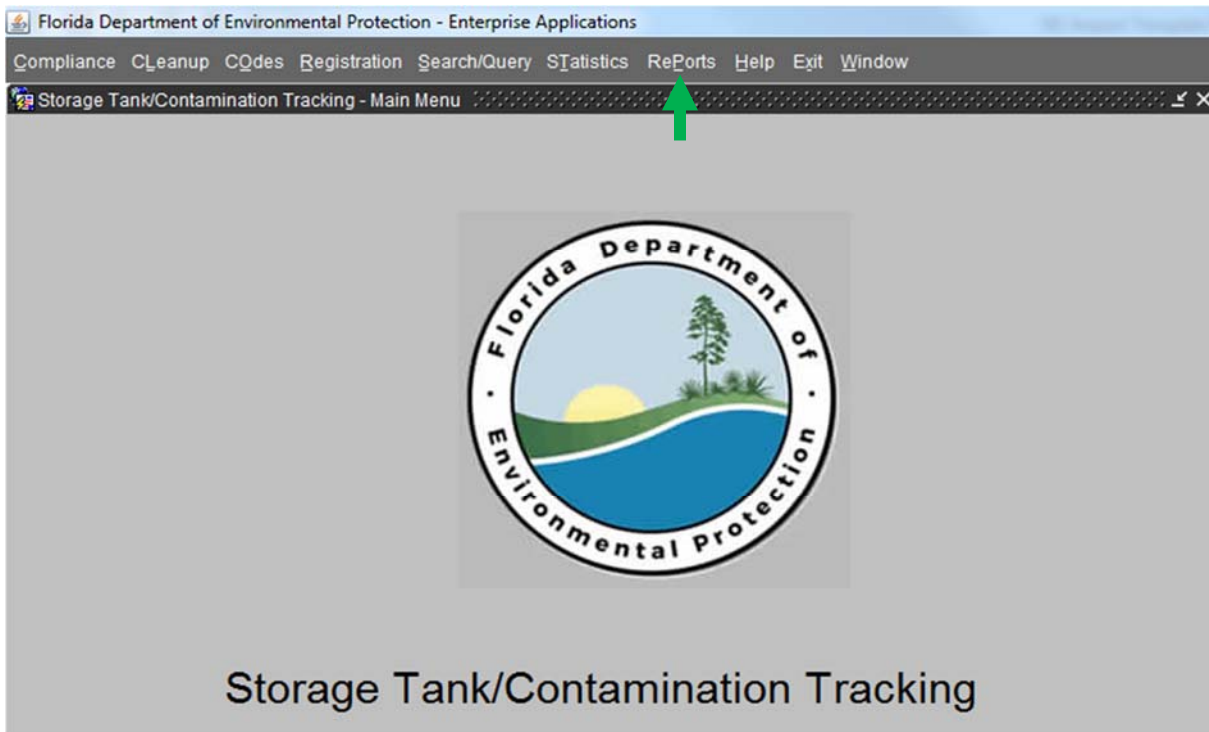


Figure 8

Petroleum Restoration Program CPE Guidance

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

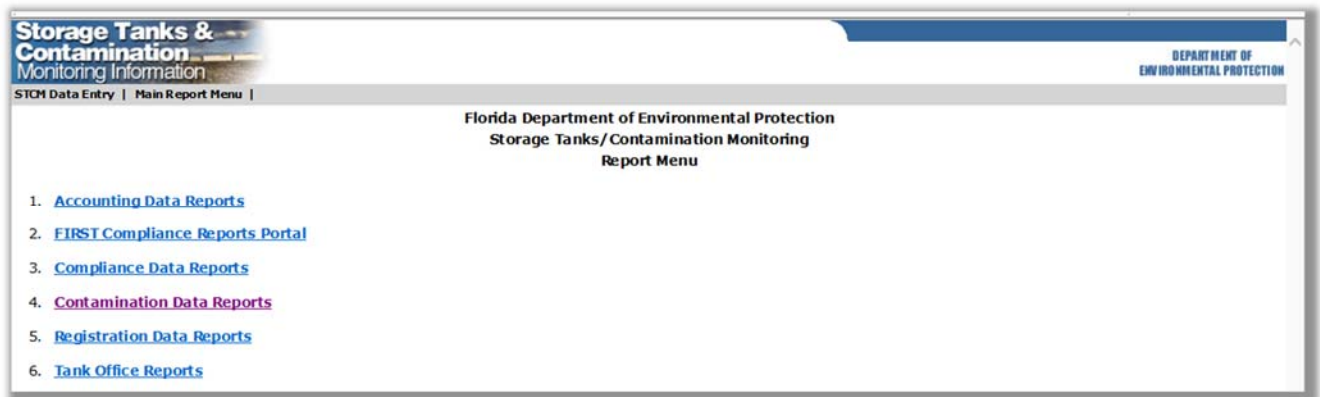


Figure 9



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.)

Petroleum Restoration Program CPE Guidance

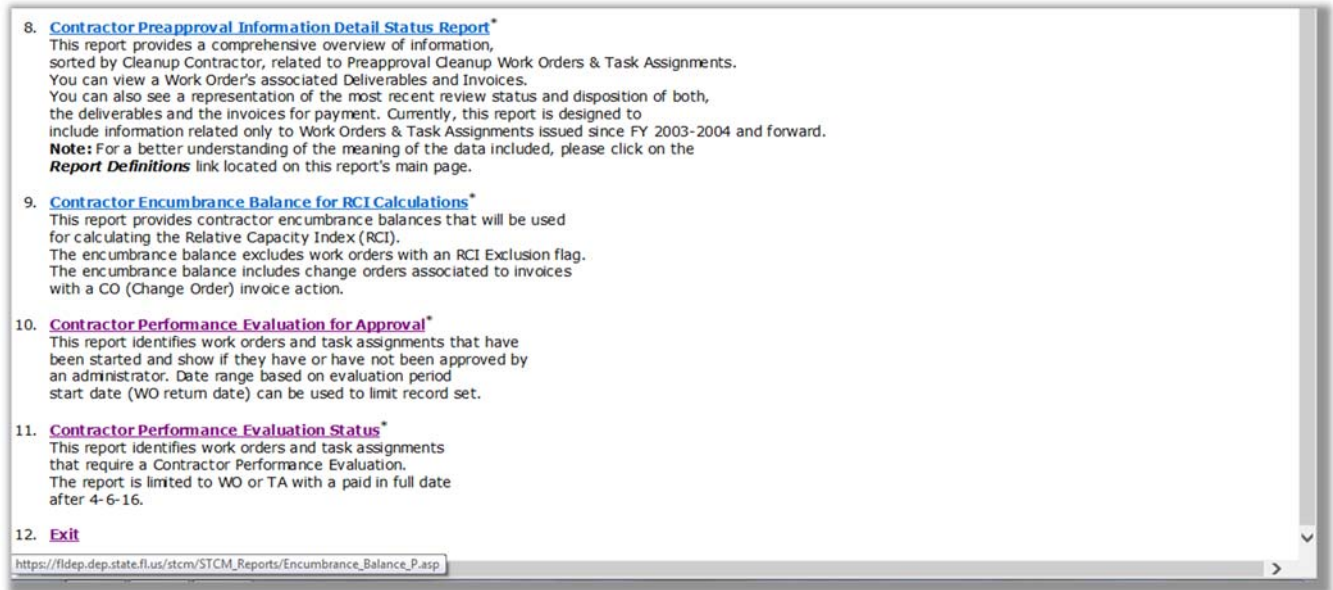


Figure 11