**POS/PSA Contractor Performance Evaluation Job Aid**

[OPM’s Procurement Standards](https://portal.ct.gov/OPM/Fin-PSA/Standards/PSA-POS-Procurement-Standards) require that executive branch agencies complete a performance evaluation within 60 days of the end date of any POS or PSA contract. This requirement is an implementation of C.G.A. Sec. 4-217, which requires OPM to ensure the evaluation of contractor performance. As of February 2022, these evaluations can now be completed directly in CTsource, the State Contracting Portal. This job aid provides a step-by-step guide to submitting a performance evaluation.

***Who should complete a contractor performance evaluation?***

Evaluations should be completed by agency staff with management and oversight knowledge of the contract and services provided. The most appropriate staff member to complete the evaluation may not have the requisite permissions to create an evaluation in CTsource. If this is the case, the agency should either secure permissions for that staff member, or designate a CTsource point of contact who can provide support in submitting the evaluation.

***How do I register with CTsource to complete performance evaluations?***

For assistance with registering with CTsource, and receiving login credentials, please reach out to your agency’s system administrator to be added as a user. There is no limit to the number of staff that can be registered in CTsource. You can find a list of system administrators by agency, current as of January 2022, in the appendix of this job aid.

***What if the contractor whose performance I am trying to evaluate is not registered in CTsource?***

In order to complete a performance evaluation for a contractor, vendor, or provider, the contractor must first be registered in CTsource. Registration is a quick and simple process that allows vendors and providers to access a variety of benefits, including notifications for new procurement opportunities. You can share the following link with your vendors and providers, which will guide them through the registration process: <https://portal.ct.gov/DAS/CTSource/Registration>.

***Am I required to complete a contractor performance evaluation when utilizing DAS master contracts?***

DAS is in the process of establishing a vendor performance evaluation process for master contracts that will be consistent with the OPM process for POS/PSA contracts described in this job aid. OPM and DAS will provide additional guidance on master contracts in the coming months.

***How do I complete a contractor performance evaluation?***

Contractor performance evaluations should be submitted via CTsource within 60 days of the end date of the contract in question. Staff can follow the steps on the following pages to complete an evaluation.

1. **Log into CTsource** – enter your username and password on the CTsource login screen found at <https://webprocure.perfect.com/login.do>



1. **Navigate to the Vendors tab and select “View Vendors.”**



1. **Enter the name of the supplier to be evaluated (your provider or vendor) and hit the “enter” key or the “Search” button at the bottom of the page.**



1. **Select the correct supplier from the search page by clicking their name**



1. **You will now be viewing the supplier’s profile. Navigate to the “Supplier Evaluation” tab.**



1. **Follow the instructions on the evaluation form. Begin by providing the contract number, agency name, and a brief description of the services. If this evaluation is intended to amend a previously submitted evaluation, because new information has surfaced or an error was made, please make note of this in your contract description answer. You may also upload any supporting documentation.**



1. **Complete the evaluation by assigning a 1-5 score for Quality, Timeliness, Compliance, and Responsiveness. Use the “Comment” button to explain your reasoning for each score. Finally, state whether a corrective action plan was required during the contract, and press “Submit Score.” You may also upload any supporting documentation.**



1. **You’re all done!**

***How do I review completed evaluations?***

When making important procurement decisions, such as the decision to award a contract to a particular vendor or provider, agencies may wish to consult any previously completed evaluations that have been logged for that vendor or provider, to better understand their record of performance. Previously completed evaluations can be found via the following steps:

1. **Within the supplier profile, navigate to the “Scorecard” tab.**



1. **Click “General Performance Score.” You will see a breakdown of all completed performance evaluations. You may click “View Evaluation” on any evaluation you would like to view in detail, to review further. You may also review your own evaluations on this page.**



**APPENDIX: Agency System Administrators**

This list of system administrators is current as of January 2022. If contacts are outdated, to receive an updated list, please reach out to John Winschel at DAS Procurement (John.Winschel@ct.gov).

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| --- | --- | --- |
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