Office Engineer, Contract Awards
Electronic Bidding Guide

March 2015

Disclaimer: This guide and sample documents are for general information purposes only. See the Contract Standard Specifications for bid submittal.

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INTRODUCTION

Our Mission:

Providing qualified contractors with a fair opportunity to bid on Department construction contracts that are:

- Uniform statewide and aid efficient construction administration
- Full, complete, and accurate

The Division of Engineering Services - Office Engineer is composed of four offices:

- Contract Awards and Services
- Construction Contract Standards
- Construction Contracting Coordination and Quality Program
- Contracting Systems

We develop, advertise, and award quality Minor A, Major Construction, and Maintenance contracts for the districts and deliver those contracts to Construction.

The purpose of this Electronic Bidding Guide (Handbook) is to provide Contractors who are interested in doing business with the Department of Transportation (Caltrans) instructions for submitting an electronic bid.

Caltrans has chosen the American Association of State Highway and Transportation Officials, Trns*port Expedite Bid software as its electronic bidding solution to award quality Minor A Major Construction and Maintenance contracts for the districts. Expedite is integrated with Info Tech's Bid Express Internet Bidding Service (Bidx) for the submittal of electronic bids through the Internet.

This Handbook will provide information on how to begin the process to create a Digital ID, the steps needed to install and begin using the Expedite software, and instructs the Bidder in monitoring and managing bid submittals, including incorporating addenda and withdrawal of bid submittals.
**BIDDER IDENTIFICATION NUMBER**

To receive a Digital ID (Electronic signature), a Company must obtain a Bidder Identification Number (Bidder ID) from Caltrans’ Office Engineer.

**Bidder Identification Number**

The Bidder ID number will allow Bidders to create and activate a Digital ID, which is required to submit bids electronically. A Company only needs one (1) Bidder ID and can have multiple Digital ID’s, typically one Digital ID per authorized Bidder.

Bidders must submit a request for a Bidder ID on Company letterhead and include:

1. Company’s full legal name
2. Company’s address
3. Telephone Number
4. Fax Number
5. Company’s email address (Bidder ID will be sent electronically)

Note: A Company may be required to submit a [Payee Data Record (STD 204)](http://example.com) in order to establish their Bidder ID.

Submit the request to Caltrans by US Mail or fax:

Department of Transportation
Office Engineer
1727 30th Street, MS 43
Sacramento CA, 95816-7005

FAX: (916) 227-6282

Note: The process of obtaining a Bidder ID from Caltrans may take up to seven (7) days.
BID EXPRESS SERVICE

A. To Activate an Express Service (Bidx) Account

When you have received your Bidder ID, go to https://bidx.com to establish your Bidx account.

Click “Join now!” to begin.

Establishing the Bidx account.

1. Provide a valid email address.
2. Enter a password
3. Verify the password (case sensitive)
4. Select Agency (California Department of Transportation)
5. Agree to the Terms and Conditions
6. Click “Submit”

7. Bid Express service will send a confirmation email to the address provided.
8. Go to your email account and locate the email
9. Open email and click the link found
10. Enter your password to activate account
B. To Subscribe to an Express Service (Bidx) Account

Follow the instructions to subscribe to the Bidx service.

1. Go to https://bidx.com
2. Select the “Order” menu and choose “Fee Schedule”.
3. Review the available service and associated fees
4. Select the “Order” menu and chose “Subscribe Now!”
5. Click the links for the Subscriber Agreement and Acceptable Use Policy and review each document.
6. Enter a valid email address, password, select the referring agency, and agree to the terms and condition of the Bid Express Subscriber Agreement and Acceptable Use Policy. Click “Submit”.
7. Locate the email sent to your email address and click the link in the email. Enter password to activate the account.
8. Complete the Bid Express Service form.
9. Click the “Save” button.
10. This will automatically log you into the site.
C. Fee Schedule for Bidx Services


<table>
<thead>
<tr>
<th>A one-time subscription fee:</th>
<th>$100.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly fee*:</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

*Monthly fee includes the Basic fee of $35.00 and Internet Bidding fee of $15.00

1. Fees billed for this service are in advance on a monthly basis (not prorated).
2. Bidx will only accept Major credit cards for monthly payments. (Visa, MasterCard, American Express or Discover)
3. Bidders can cancel their Bidx service account at any time.
4. Without a Bidx service account, users have limited use of the service.
5. Company will need to repay the one-time subscription fee ($100.00) to subscribe for a new account and Digital ID, if service is cancelled.

D. Installing “Expedite Bid 5.11a” Software

When you subscribe to Bidx, you will have access to the “**Expedite Bid 5.11a**” (Bid) software that will allow you to prepare bids for electronic submittal.

Install “**Expedite Bid 5.11a**” (Bid) software from the Bidx website to create your Digital ID and submit bids for Caltrans advertised projects.

Go to [https://bidx.com/ca/main](https://bidx.com/ca/main) to “Download”.

![Image of Bid Express website](https://example.com/bidx.png)
Prior to downloading the software, you will be required to complete a form regarding the software’s export restrictions.

Installing software:

1. Click the “**Expedite Bid 5.11a**” link
2. Enter the required information on the form
3. Click the “Download Expedite Bid” button
4. Scroll to Agency “California Department of Transportation”
5. Click “Run” twice
6. Complete the steps in the Installation Wizard
7. Click “Finish” when complete.

For questions or assistance, contact the Bidx Help Desk at 1-888-352-2439.
E. Configure Expedite Software

When you complete the installation and open the program, it will be prompt you to enter the appropriate bidder and agency information.

To set-up a company profile: Bidder information and Agency/ID folders must be complete.

Configure the expedite software:

1. Double-click the “Expedite Bid” software
2. Click the “OK” button
3. In the Bid Options window, enter company information on the Bidder Information
4. Click the Agency/ID tab
5. Type in the Company name
6. Enter the Bidder ID in the Bidder ID field
7. Click “Apply”
8. Click “OK”

F. Digital ID

What you need to know prior to creating a Digital ID?

1. In order to use the program you need to update, download and install “Microsoft .NET 4.0 Framework”. Bidx uses the Bid Express KeyLab to generate the key. Go to http://www.microsoft.com/download/en/details.aspx?id=17851
2. The password in conjunction with the Digital ID will be needed to submit and withdrawn bids. Once created, the password cannot be changed or retrieved.
3. A company can create Digital IDs for each person authorized to submit bids for their company. Store and backup your Digital ID files, and record your password in a secure location. Files and passwords are lost; they cannot be retrieved or recovered. You will need to pay the associated to create a new Digital ID.
G. Create A Digital ID

The Digital ID is the electronic signature and is the legal equivalent of a written signature. In order to submit or withdraw an electronic bid submittal, the Digital ID is required.

Remember the Digital ID is not registered and activated until Bidx Administration approves.

Logging into the Bid Express Service

1. Click the “MyBidx” button in the top right corner of the page.
2. Click “Digital IDs” in the Account Services section.
3. Click “Create New”.
4. Click “Generate ID”.
5. If you need to, click Run to start the Bid Express KeyLab.
6. Click “Next” in the Bid Express KeyLab pop-up window.
7. Enter your name in the “Your Name field”.
8. Enter your company in the “Company field”.
9. Select the agency (Caltrans) with which you are bidding from the drop down list.
10. Enter your Bidder ID (provided by Caltrans).
11. Click “Next”.
12. Select the check box indicating you agree to the one-time $100 charge for the creation of the ID and the $15.00 (Once the Digital ID is enabled a monthly fee will be charged to keep the ID active).
13. Select the check box indicating you have downloaded the Expedite Bid software and updated your company information in the Options window.
14. Click “Next”.
15. Enter a password for your Digital ID in the Password field of the Digital ID Generator in the Bid Express KeyLab.
16. Enter the password again and click “Create Digital ID”.
17. Start the back up of your Digital ID by clicking “OK”.
Managing your Digital ID - Keep your Digital ID in a secure location this will prevent an additional cost if the password is lost or forgotten.

Navigate to the specific file location to where you would like your Digital ID backed up.

18. Click “Save” **after choosing the file location for your back up.**
19. Click “Continue” in the Bid Express KeyLab
20. Click “Next” in the Create A Digital ID window
21. Click “Print Registration”
22. Click “Print” to print the Digital ID paperwork
23. Close the print window
24. Click “Next” in the Create A Digital ID window
25. Click “Finish”

The printed registration form must be completed and notarized.

Mail to:

**Info Tech, Inc.**  
**Attn: Bid Express Administration**  
**5700 SW 34th St., Suite 1235**  
**Gainesville, FL 32608-5371**

The registration process can take up to five (5) days.

For information regarding the Info Tech Digital ID Application and Activation Policies, go to the following link:  

If you have any issues with submitting your bid, you may contact the Bid Express Help Desk at 1-(888)352-2439

**STATUS** – To check the status of your Digital ID by log into your Bidx account. Click the MyBidx button and under Account Services click Digital IDs. Click the Manage Digital ID for the status.

- Only one Bidder ID is required, but a company can have multiple Digital ID’s (fees apply), for individuals authorized to submit bids for the company.

- Joint Ventures will require a Bidder ID and Digital ID (fees apply)
H. Testing the Bidx System

Prior to submitting a bid, Caltrans recommends that you test your system.

1. Using your Digital ID, you may submit a bid to Caltrans to test your system
2. Submit an electronic bid
3. Upon successful bid submission, you will receive a Bid Submittal Receipt from the Bidx software
4. The receipt will indicate the time the bid was submitted
5. After verifying that your system works, you may withdraw your bid, or modify and submit another bid to replace bid
6. Caltrans will not see any withdrawn bid

I. Glossary

Terms or words used in Caltrans contracts may differ from those used in Bidx.

<table>
<thead>
<tr>
<th>Caltrans Terms/Words</th>
<th>Terms/Words Published on Bidx Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>BID OPENING</td>
<td>LETTING</td>
</tr>
<tr>
<td>BID</td>
<td>PROPOSAL</td>
</tr>
<tr>
<td>ADDENDA</td>
<td>AMENDMENT</td>
</tr>
<tr>
<td>BID ITEM LIST</td>
<td>SCHEDULE OF ITEMS</td>
</tr>
<tr>
<td>WHERE TIME PORTION OF A COST + TIME BID IS ENTERED</td>
<td>PROPOSAL SITES</td>
</tr>
<tr>
<td>CONTRACT NUMBER</td>
<td>CONTRACT ID</td>
</tr>
</tbody>
</table>
ELECTRONIC BID SUBMITTAL IDENTIFICATION

A. Advertised Bidding Projects
   Now that you have your Digital ID, you have the opportunity to bid on advertised Minor A projects. For a list of current advertised projects go to the Caltrans Office Engineer website at:  http://www.dot.ca.gov/hq/esc/oe/weekly_ads/all_adv_projects.php

B. Downloading the Electronic Bid Book

On the “Advertised Projects”, select the contract to download.

   a) On the project advertisement page, link:  http://www.dot.ca.gov/hq/esc/oe/weekly_ads/all_adv_projects.php
   b) Click on the “Bid Book” link provided to download.
   c) Go to “Caltrans Bidding Connect”
   d) Log in or register to the Caltrans Bidding Connect portal.
   e) The system will log you into the Bidding Plan holder’s database.
   f) The file name will begin with the contract number, and end with file extension "EBS."  **Do not change the file extension.**
   g) Save the.EBS file (In order to attach Addenda to an EBS file with added bid information, the addenda needs to be saved in the same location)

   Set up your MyBidx account (Manage Bidx Messages, Page 33) to receive messages and email notifications.

2. Electronic Bid Book Amendments (Addenda), (Incorporate Addenda, page 30)
DOCUMENTATION

The Electronic Bid submittal requires certain forms to be submitted at time of bid or prior to bid opening, and allows for other forms and documents to be submitted after the bid opening with specific deadlines.

A. Required for Electronic Bid Submittal
Documents and information required at time of bid opening as scheduled in the solicitation document include:

1. BID
2. California Contractors License Number
3. Public Works Contractor Registration Number
4. Small Business Preference
5. Non Small Business Preference
6. California Company Preference
7. Subcontractors List
8. Bid Security (Bidder’s Bond) – Must be received prior to or with Electronic Bid submittal. Failure to submit the Bidder’s Bond as specified may deem your bid nonresponsive.

B. Bidder’s Bond Submittal

1. To submit an Electronic Bidder’s Bond, apply through either Surety 2000 or SurePath.
   a) Enter Electronic Bidder’s bond data in the Bid Bond Data folder.
   b) Once Bid bond data has been entered, select "Verify" to verify your electronic Bidder's bond.

For additional information go to: http://surety2000.com/ or http://web.insurevision.com/

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1 California State Contractor License number. (Effective July 1, 2014), per PCC 4101 a (1).
2 Department of Industrial Relations - Labor Code section 1771.1(a). (For Bids submitted after March 1, 2015) http://www.dir.ca.gov/Public-Works/PublicWorks.html
2. If mailing the Bidder’s Bond, Caltrans must receive the bond prior to bid opening as scheduled in the contract solicitation document.

Mail to:

Department of Transportation
Office Engineer
1727 30th Street, MS 43
Sacramento CA, 95816-7005

C. Supporting Documentation - After Bid Opening Schedule

Refer to the contract specifications for submittal requirements.
PREPARING AN ELECTRONIC BID FOR SUBMITTAL

A. Bid Item List

The Project selected will have the information needed to submit your bid.

Open the Bid Item List:

1. Bid Item List: Enter Unit Prices or total Lump Sum for each item (Except for Alternate Bid Items)
2. Alternate Bid Items: Select only one of the options shown.
3. Bid will automatically perform the calculations for the item extension, as well as the total of the bid.
4. The bottom row of Bid will show the total amount of your bid.
5. As data is entered into each field, pressing the "Tab" or "Enter" key will move the cursor to the next field.
Proposal Sites Folder

Information for Cost + Time bids will only be available in the Proposal Site folder.

1. In the box labeled "# Days", enter the number of working days.
2. Do not exceed the number of days specified or your bid may be deemed nonresponsive.

<table>
<thead>
<tr>
<th>Site #</th>
<th>Type</th>
<th>Cost/Day</th>
<th># Days</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>13,500.00</td>
<td></td>
<td>225</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3,037,500.00</td>
</tr>
</tbody>
</table>

B. Bid to the Department of Transportation

1. Enter your California State Contractor License number. (This is required for State funded projects optional for projects with Federal Aid).
2. Enter your Public Works Contractor Registration Number.

Select the type of Bid Security

- Bidder's Bond
- Cash
- Certified Check
- Criminal Prosecution
C. Subcontractor List

1. List Subcontractors as required.

2. To enter subcontractors, use the "List this subcontractor?" radio button which requires a “Yes” or “No” to populate the fields.
   a) Select "Yes" then you must enter the firm name, location city, and state.
   b) If you select "No", it will not list the subcontractor on the bid.
   c) If you enter information for a subcontractor and then decide not to use or list that subcontractor, you can select "No" from the "List this subcontractor?" pull down menu. It will not display the subcontractor in the bid book's Subcontractor List.

3. Fields are provided for:
   a) California State Contractor License Number.
   b) Public Works Contractor Registration Number.
   c) Bid Item number (one per line)
   d) Percentage of work
   e) Description of work to be performed
4. If you are listing the same Subcontractor for more than five (5) Bid Items, go the next “List this subcontractor?” answer “Yes” and only enter the Business Name and type Continued.

D. Additional Subcontractor List
   There are three additional Subcontractor List folders to list additional subcontractors.
E. Request for Small Business Preference (State)

Caltrans is dedicated to increasing the participation of enterprises that are Small Business (SBE), Disadvantaged Business (DBE), and Disabled Veteran Business (DVBE) firms in both Federal and State contracting and procurement. Caltrans ensures non-discrimination in the execution of contracts and promotes positive external customer relations.

To request either Small Business Preference or Non-Small Business preference complete the required information in either the Small Business Preference or the Non-Small Business Preference section.

1. To complete the "Small Business Preference" enter the date and the Small Business certification number to request the Small Business Preference.

2. To complete the "Non-Small Business Preference" section enter the date.

By requesting the Non-Small Business Preference, you are committing to subcontract at least 25% of your total bid to Small Business, and must submit the Certified Small Business Listing for the Non-Small Business Preference form under SS 2010, Section 2-1.33.
F. California Company Preference (State)

1. Principal place of Business
   a) Select “am” if your company’s principal place of business is in California
   b) Select "am not" if your company’s principal place of business is in another State.

2. No Local Contractor Preference
   a) Select “am” if your company’s principal place of business is outside of California in a state where there is no local contractor preference.
   b) Select “am not” if your company’s principal place of business is outside of California in a state where there is local contractor preference, select name of state and continue to number three (3).

3. Local Contractor Preference
   If your company’s principal place of business is outside of California in a state, where there is a local contractor preference.
   a) Select “am” if your company’s has paid no less than $5,000 in sales or use taxes to California for construction related activity for each of the five (5) years immediately preceding the submission of the bid.
   b) Select “am not” name of your state, and enter your California Sales or Use Tax number, if your company has not paid $5,000 or more in sales or use taxes to California for construction related activity for each of the 5 years immediately preceding the submission of the bid. Continue to number four

4. Certify not a “California Company”
   a) Select “am not”
   b) Enter your company’s place of business
   c) Describe any and all bid preferences provided to your company in the state in which your company has its principal place of business
G. Opt Out of Payment Adjustments for Price Index Fluctuations

Opting out of the payment adjustments for Price Index Fluctuations of the special provisions specified in Payment Adjustments.

1. Enter the date
2. Enter your name

H. Small Business Status (Federal)

California Department of General Services, Office of Small Business & Disabled Veteran Business Enterprise Services (OSDS) is the State’s certifying agency for Small Business and DVBEs.

1. Select “Yes”, if certified as a "Small Business" by the OSDS.
2. Enter “Certification number”
3. Non Small Business Select “No”

Statistical reporting only RADIO BUTTON
I. Disadvantaged Business Enterprise (DBE) (Federal)

1. DBE form folders are no longer available in the electronic Bid Book.
2. Caltrans Bidder DBE Commitment - forms for bidding are available with the contract documents on the advertised project site in Forms for Bid.
3. Good Faith Efforts Documentation - forms for bidding are available with the contract documents on the advertised project site in Forms for Bid.

J. Certified Disabled Veteran Business Enterprise (DVBE) (State)

1. DVBE Summary
   Enter DVBE's certification number provided by OSDS.
2. Non DVBE
   a) Enter a contact person's name and phone number
   b) Total DVBE participation percentage claimed
   c) Total dollar amount
   d) Bid Item number(s)
   e) Description of work to be subcontracted or materials to be supplied
   f) DVBE's name, telephone number, certification number, and dollar amount committed to DVBE.
   g) Forms are located in the electronic bid folder.
3. The **Certified DVBE Summary, (DES-OE-0102)** Refer to the contract specification for document submittal requirement.

K. Certified Small Business Listing for the Non-Small Business Preference (State)

1. If requesting the Non Small Business Preference
   a) Enter the Person to contact name
   b) Enter telephone number
   c) Enter the “Total Claimed Participation”, in dollars, and as a percentage of your total bid.
   d) Enter the bid item number(s)
   e) Description of work, service, or materials
   f) Firm name,
   g) Phone number
   h) Small Business certification number
   i) Dollar amount of the work, service, or materials committed to Small Business.

2. The **Certified Small Business Listing For The Non–Small Business Preference DES-OE-0102.8** Refer to the contract specification for document submittal requirement
L. Certifications

Certification requirements apply to either State or federally funded projects or both.

1. Disclosure of Lobbying Activities Certification (Federal)

“...requiring the person to submit a statement under penalty of perjury declaring that neither the person nor any subcontractor to be engaged by the person has been convicted of any of the offenses referred to in this section within the preceding three years.” (Government Code (GC) 81002 (b))

If there are not any lobbying activities to disclose?
   a) Select "No" from the radio button

If there are lobbying activities to disclose
   b) Select "Yes"
   c) Complete the form
2. Equal Employment Opportunity Regulation Certification (Federal)

Caltrans is committed to ensuring equal employment opportunity on all federal-aid highway construction contracts; and shall collaborate and work cooperatively with the Federal Highway Administration (FHWA) and construction contractors to ensure compliance with all federal Equal Employment Opportunity laws, regulations and statutes. As required by Executive Orders 10925, 11114 or 11246.

a) Enter Bidder’s company name
b) Enter proposed subcontractor RADIO BUTTON

3. Title 49, Code of Federal Regulations, Part 29, Debarment and Suspension Certification (Federal)

a) Enter any exceptions to the certifications in the first three (3) boxes
b) Enter to indicate to whom it applies, initiating agency, and dates of action in the next three (3) boxes.

M. Undocumented Aliens Employment – (Required Contract Language) PCC 6101
N. Non Collusion Affidavit

Every bid on every public works contract of a public entity shall include a declaration under penalty of perjury under the laws of the State of California (Public Contract Code (PCC) 7106)

1. Enter “State”
2. Enter “County”
3. Enter “Name”
4. Enter “Company Title”
5. Enter “Company Name”

O. Child Support Compliance Act – (Required Contract Language) PCC 7110

P. National Labor Relations Board – (Required Contract Language) PCC 10232

Q. Violation of Law or a Safety Regulation Certification

“… under penalty of perjury, of a standard form of questionnaire inquiring whether such prospective bidder, any officer of such bidder, or any employee of such bidder who has a proprietary interest in such bidder, has ever been disqualified, removed, or otherwise prevented from bidding on, or completing a federal, state, or local government project because of a violation of law or a safety regulation, and if so to explain the circumstances…” (PCC 10162)

1. Select "Yes or No" Radio button
2. If "Yes", type in an explanation
R. Antitrust Law Certification

“….A state agency may determine the eligibility of any person to enter into a contract under this article by requiring the person to submit a statement under penalty of perjury declaring that neither the person nor any subcontractor to be engaged by the person has been convicted of any of the offenses referred to in this section within the preceding three years” (PCC 10285.1)

1. Select "has" or "has not" (Radio Button)
2. If "has", use field provided for an explanation

S. Permits, Licenses, Agreements, Certifications, and Railroad Relations and Insurance Requirements - SS 5-1.02

T. Bidder Responsibility Questionnaire

1. Select "Yes or No" in response to the questions (Radio Button)
2. If "Yes" use field provided for an explanation

BY DIGITALLY SIGNING AND SUBMITTING A BID, YOU ARE AFFIRMING THE CERTIFICATIONS CONTAINED IN THE BID BOOK.
PREPARE THE ELECTRONIC BID

SELECTING PROJECT

Expedite Bid Program
1. Select project file and download.
2. Open the Bid to the Main Screen
3. The LEFT SIDE of the screen shows the different folders required for bid submittal, either at time of bid opening or after (documents required after the bid opening have deadlines).

FOLDERS DETAILS (LEFT SIDE)

4. Folders will change color to track your progress.
   a) RED - “Incomplete”
   b) GREEN - “No further action required at this time”
   Note: The green folders may contain attachments to print for submission after the specified bid open date.

5. **RIGHT SIDE** of the screen shows project information:

<table>
<thead>
<tr>
<th>Agency</th>
<th>Bidder ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid Opening (Date)</td>
<td>Fed Aid No. (left blank if no Federal Aid)</td>
</tr>
<tr>
<td>Call Order</td>
<td>County</td>
</tr>
<tr>
<td>Contract No.</td>
<td>Amendments</td>
</tr>
<tr>
<td>Date Generated</td>
<td>Joint Bid</td>
</tr>
<tr>
<td>Date Revised</td>
<td>Check</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

6. Remember to save your work as you complete the Electronic Bid
INCORPORATING ADDENDA

To incorporate an addenda into the .EBS file, the addenda needs to be save in the exact same location as the .EBS file. After the “bidder inquiries”, the Addenda will be added and ready for downloading.

There are two ways to incorporate the addenda into your bid submittal.

1. Save File
   a) Go to the Caltrans Office Engineer website.
   b) Click on the Electronic bid book, addenda link on the project advertisement page.
   c) Electronic bid book addenda are identified with the contract number, and the corresponding number of the addenda (Ex. 01-123456.001)
d) Do not change the file name; keep exactly as identified. The addendum is saved with the contract number and the corresponding addendum number (with ext., .001, .002…)
e) If there is more than one addendum, you will need to download each addendum sequentially.
f) Save the file in the exact location as the .EBS file
g) The addenda will automatically attach and update the .EBS file (save each addenda in the exact same location of the .EBS file in order for the addenda to incorporate into .EBS file.
h) You will only need to amend the new entries in the addenda.

2. Load Amendment
   a) Addenda can also be incorporated by opening BID
   b) Select "File"
   c) Select "Load Amendment"
   d) Locate addenda file
   e) Select the file
   f) Select "Open."
g) An Amendment Changes window will open
h) First folder on the left will show the number of amendments applied, indicating successful incorporation of addenda.
i) Select the "Print" button to print the details of the Amendment change.

3. An eliminated item from the Bid Item List will have an Item Code of "BLANK" (there will be no description for the eliminated bid item) with a fixed price of $0.00, which cannot be modified.
MANAGE BIDX MESSAGES

Bidx has a function that will assist in keeping you updated on project activities. Sign up to receive messages sent from Caltrans. You can even set up to receive messages and notification on advertised projects via email.

1. Log into the Bidx.com website
2. Select "Messages" from the upper right corner of the webpage
3. Select "Manage Messages and Notifications."
4. In the "User Notification" screen
5. Under the Email column
6. Select "Proposal Activity"
REVIEW BID

Prior to submitting electronic bids, take the time to do a final review.

A. Check for Completeness

Things to look for:
- All of the folders should be green
- To check your bid Select "Tools", then select "Check Bid"
- (May also click the yellow check mark icon in the toolbar)
- If your bid is incomplete, a message will pop up to indicate bid errors and what needs to be completed
- If your bid is complete, a message will show that says "Bid Is Complete"

Note: Bidx will allow submittal of an incomplete bid. It is the bidder’s responsibility to resolve and verify the required data submitted electronically through Bidx. Failure to do so may lead to Caltrans deeming your bid nonresponsive.

B. Saving the Bid

1. Select "File", then select "Save" or
2. Select the “disk icon” on the toolbar
SUBMIT ELECTRONIC BID

All folders will be green after completing bid information. For additional information on submitting bids, go to the Bidx website at https://www.bidx.com/

A. Bid Submission

1. Open the Expedite Bid software
2. Click “Bid Submission” button
3. Bid Submission Wizard opens
4. Click “Next”
5. Select the Agency “California Department of Transportation”
6. Enter digital ID password in “password” field
7. Click “Next” button
8. Bidx will verify Password; digitally sign, encrypt and submit bid.
9. Print the Bid Submission Receipt
10. Click “Next” button
11. Click “Finish”

Keep the Bid Submission Receipt as proof of bid submittal.

Note: A Bid submitted more than once will override the previous submittal. After each submittal, print the bid submission receipt. The only bid that Caltrans will see is the last bid submitted after bid closing time.
B. Joint Venture Bid (Joint ventures require a unique Digital ID)

If the bid submitted is a Joint venture, indicate by marking as a joint venture. Select "Tools", then select "Mark as Joint bid"

C. Bid Withdrawal

If revising a submitted bid prior to bid opening, you do not need to withdraw. Just re-submit the bid and it will replace the previous bid.

Withdrawing a bid completely:

Select "Tools", then select "View Submitted Bids"
1. Choose your Digital ID from the list,
2. Enter your password and select "Next."
3. Select the bid that you want to withdraw
4. Select "Yes" at the confirmation alert box.
5. Select the "Print" button to obtain a receipt documenting that the bid has been withdrawn
6. Select "Finish" to complete process
PRINTING

You can print all or part of the document at any time.

To print the whole document

1. Select "File" from the upper left portion of Bid
2. Select "Print" from the drop down menu

To print individual page(s)

1. Select "Adobe PDF" from the printer list (If Adobe Acrobat is not installed on your computer; there are free PDF converters available that will perform the same function).
2. Individual page(s) from your bid can printed from the PDF version.
3. You can print the required Forms not required at time of bid and submit prior to deadline establishing in the contract.

PUBLIC BID OPENING

Office Engineer, Contract Awards, conducts public bid openings to award quality Minor A, Major Construction, and Maintenance contracts for the districts. Bidders may participate in the public bid opening via webcast or teleconference following the instructions below.

To access the bid opening go to the following link:
http://www.dot.ca.gov/hq/esc/oe/contractor_info/ElectronicBidOpeningInstructions.pdf
RESOURCES

Caltrans has developed this Handbook to assist bidders with the electronic bidding process. We hope the information contained is helpful. If you have any questions or feedback please contact Office Engineer, Contract Awards at (916)227-6299

For additional information on Caltrans Electronic Bidding training material, go to Caltrans website at:

For additional information on Bid Express Training Material go to Bid Express website at https://bidx.com/site/trainingcenter
FORMS

Payee Data Record (STD 204)
Bid Security (Bidder’s Bond)
Certified DVBE Summary, (DES-OE-0102.5)
Certified Small Business Listing For The Non–Small Business Preference DES-OE-0102.8

Caltrans Bidder DBE Commitment - form for bidding are available with the contract documents on the advertised project site in Forms for Bid.
Good Faith Efforts Documentation - form for bidding are available with the contract documents on the advertised project site in Forms for Bid.

WEBSITES:

https://bidx.com/
http://www.dot.ca.gov/hq/esc/oe/weekly_ads/all_adv_projects.php
http://surety2000.com/
http://web.insurevision.com/
http://www.dir.ca.gov/Public-Works/PublicWorks.html

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