Arizona's Transportation Business Portal

USER MANUAL

http://www.AZUTRACS.com

Modified: March 2020

Table of Contents

Before you Begin: Critical Things to Know

AZ UTRACS Is Your Central Hub

AZ UTRACS is an internet site that provides access or links to other sites. We did this in order to provide a comprehensive site for you and to help direct you to all the other systems that you will need. This way, all the various systems you might require during the project process will be in one location. We hope you will use our UTRACS site as the central hub for your entire project experience. If you would like to know more details about how to work with ADOT, visit our sister site, [ADOT Business Coach on Demand](#), a free resource dedicated to providing accessible guidance about how to work with ADOT, from beginning to end, tailored to your role on the project (construction or design, prime, sub, sub-prime, etc.).

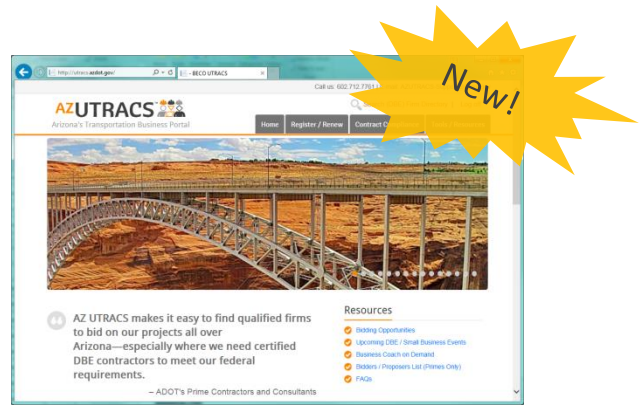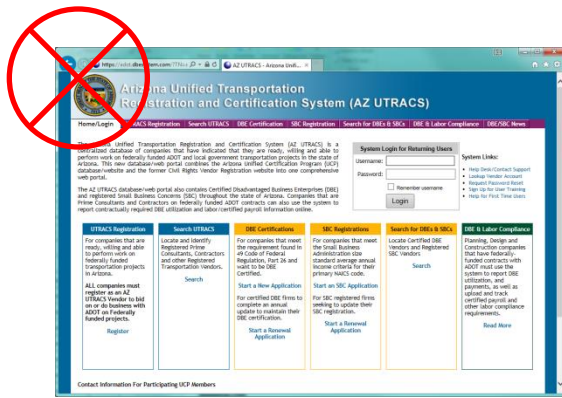### *Your Firms Primary and Secondary Contact Information*

Your firm's Primary and Secondary contacts are the **only** two individuals that can update or modify the AZ UTRACS Registration. Choose these individuals carefully. These should be the individuals that can be contacted for jobs or the person who can route requests to the right contact about jobs. These contacts and their information will be visible on the AZ UTRACS directory and public profile. They are also the only individuals that can provide other users in the firm access to create a Bidders/Proposers Lists and/or Solicitations.

Bidders/Proposers List and Solicitation Form Access

A firm can have multiple Bidders/Proposers List and Solicitation Form users. The Primary and Secondary contacts are the only two individuals that can provide access for other firm employees to create Bidders/Proposers Lists and Solicitations, as needed. Primary and Secondary contacts automatically have access to the Bidders/Proposers List and Solicitation Form features. Your firm profile (found via the [Firm Search](#)) will show the Primary and Secondary contacts. If you are the Primary or Secondary contact, you may grant access to other firm employee's for the Bidders/Proposers List and/or Solicitation Form at any time by using the [Grant Firm Access](#) feature within the Contract Compliance main menu.

New Interface

The old "AZ UTRACS" system was split out and the new AZ UTRACS system, [www.AZUTRACS.com,](#) launched in July of 2016. While the contract compliance and certification application components are still the same and in the previous system, it is available at a different link: [www.ADOTDOORS.DBEsystem.com](#) . This system is now known as DOORS. AZ UTRACS is now the central hub that provides a comprehensive experience to direct you to other necessary systems like DOORS, among others.

Not Sure How to Start?

Welcome to AZ UTRACS and your user manual. If this is your first time on our site, follow the general checklist below to get started and understand what this site is about!

1) Create a username and password by clicking Log In on the upper right side of any AZ UTRACS page.

2) Check your firm's registration
   a. If your firm already registered, update or confirm the information on your profile
   b. If your firm not already registered, add your firm

3) Ensure that your firm's Primary and Secondary contacts listed on the registration are accurate and up to date. These should be the individuals that can be contacted for jobs or the person who can route requests to the right contact about jobs. These contacts and their information will be visible on the AZ UTRACS directory and public profile.

4) Give necessary contacts ability to create Bidders/Proposers Lists and/or Solicitation Forms by going to Grant Firm Access.

5) Enjoy the AZ UTRACS site as the comprehensive site for your needs to:
   a. Create Bidders/Proposers Lists
   b. Send project Solicitations
   c. Update your firm registration
   d. Search for firms
   e. View your firm's various tasks in one place
   f. Find resources for your firm
   g. Log in to any site that you'll need during your contract experience

Questions or concerns during this process? *Let us help!*
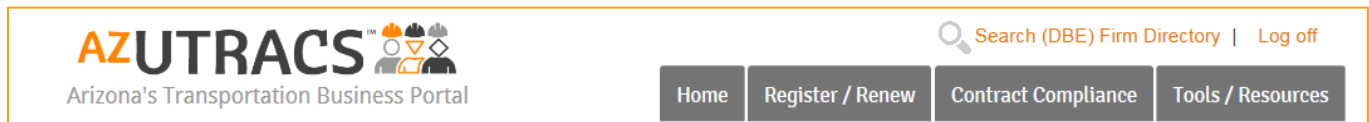Email us at AZUTRACS-Support@azdot.gov or call at (602) 712-7761

Things to Know

Home Page

Every time you come to AZ UTRACS you will start here. If you ever get lost (which we hope you don't), head back here to reset!
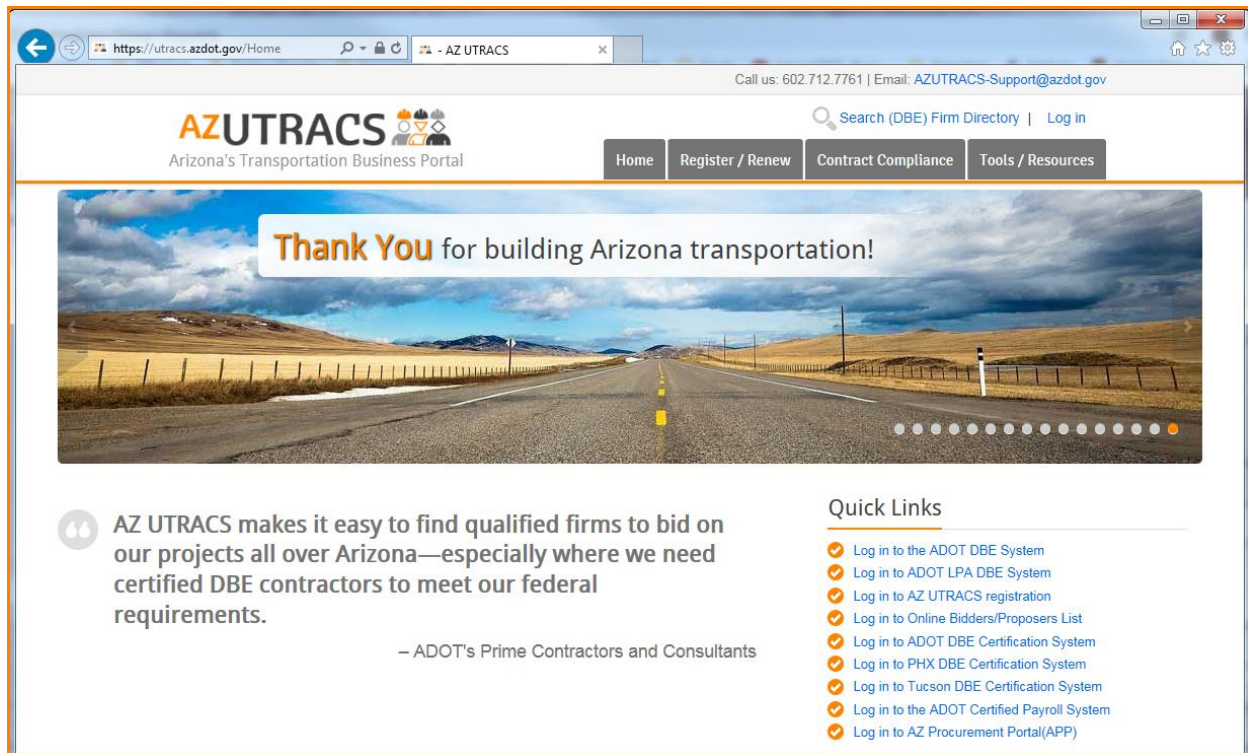
Menu Bar

Hover over the buttons and click on the options in the dropdown that appears to navigate to wherever you need to go.

User Role Navigation Pane

DBE? ACDBE? SBC? Prime? Click your role and be directed toward an entire list of resources prepared just for you!
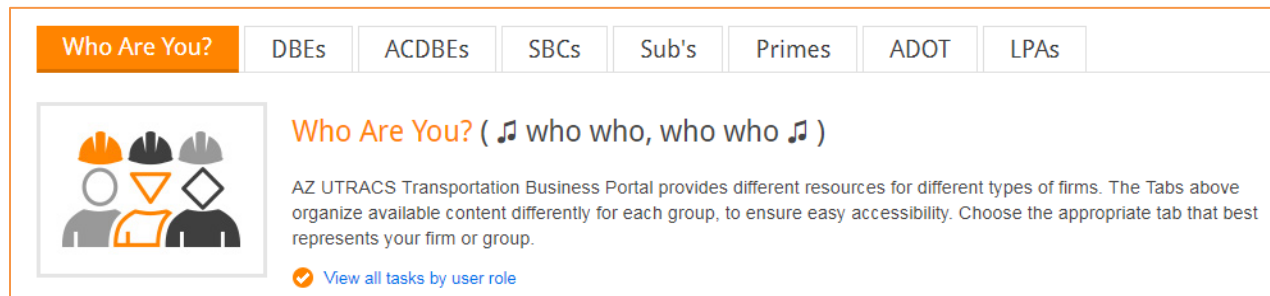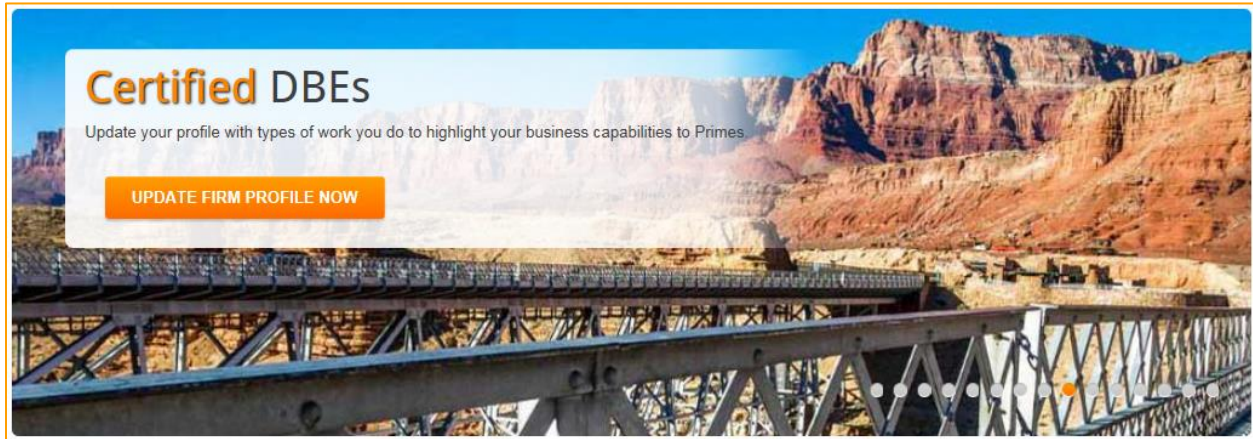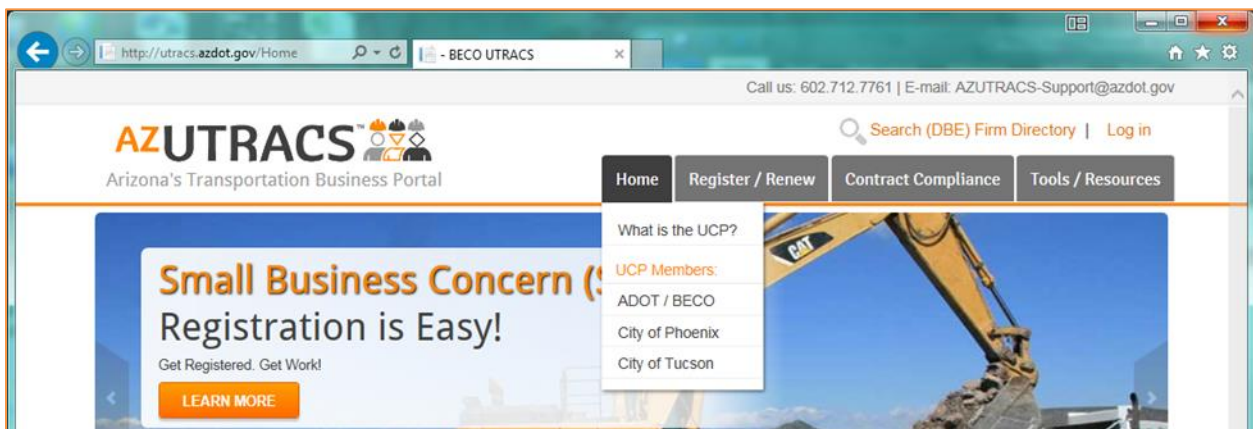
Photo Navigation Pane

Click through the photos here to find what you need if you're a visual learner. There are arrows on each side of the photos to help you navigate!
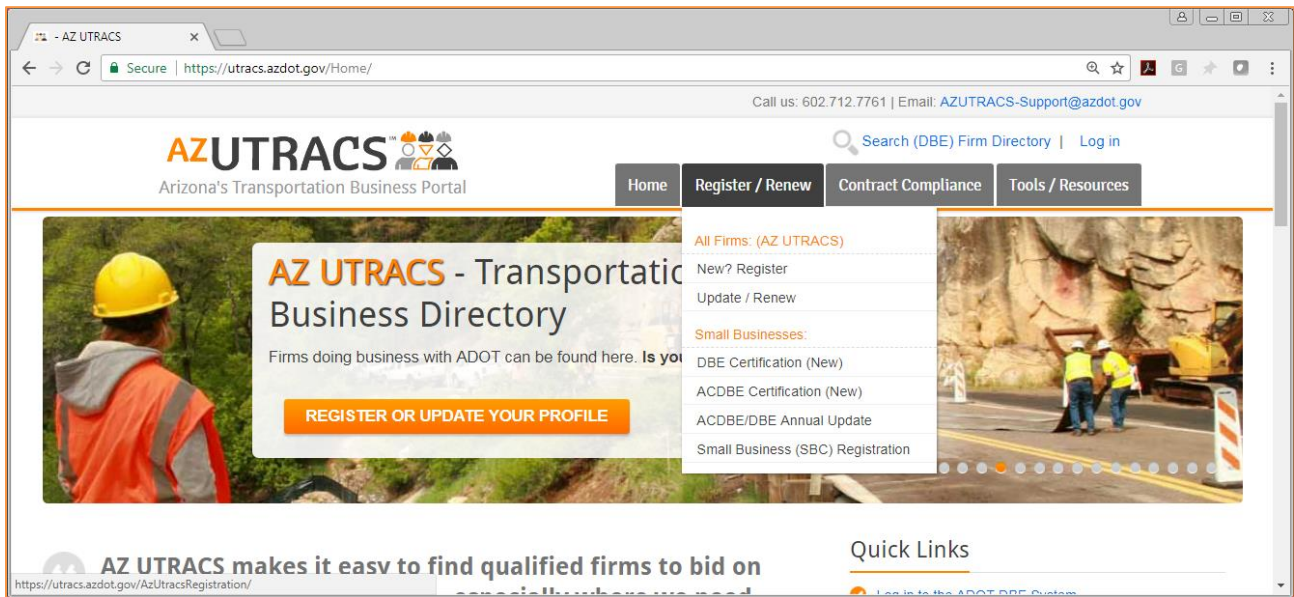

Menu Overview

Home

What is the UCP?

This is a quick link a synopsis of the Unified Certification Program (UCP)

UCP Members: **ADOT/BECO | City of Phoenix | City of Tucson**

These links take you directly to the home pages of the various certifying agencies in Arizona. The certifying agencies' purview is based on the city the firm is located within.

Register/Renew

All Firms: (AZ UTRACS) New? Register
This will take you to create a new registration so that you can be listed in the AZ UTRACS directory.

All Firms: (AZ UTRACS) Update/Renew
This will take you to your already existing Firm registration so that you can update it.

Small Businesses: DBE Certification (New)
This will take you to the DBE Certification summary and information page where you can login and apply to become DBE certified for the first time.

**Small Businesses: ACDBE Certification (New)**
This will take you to the ACDBE Certification summary and information page where you can login and apply to become ACDBE certified for the first time.

Small Businesses: ACDBE/DBE Annual Update
This will take you to the ACDBE/DBE Certification Annual Update page where you can login to your respective agency website where you will submit your annual update.

Small Businesses: Small Business (SBC) Registration
This will take you to the SBC Registration summary and information page where you can quickly register as a SBC if you meet the criteria.

Contract Compliance
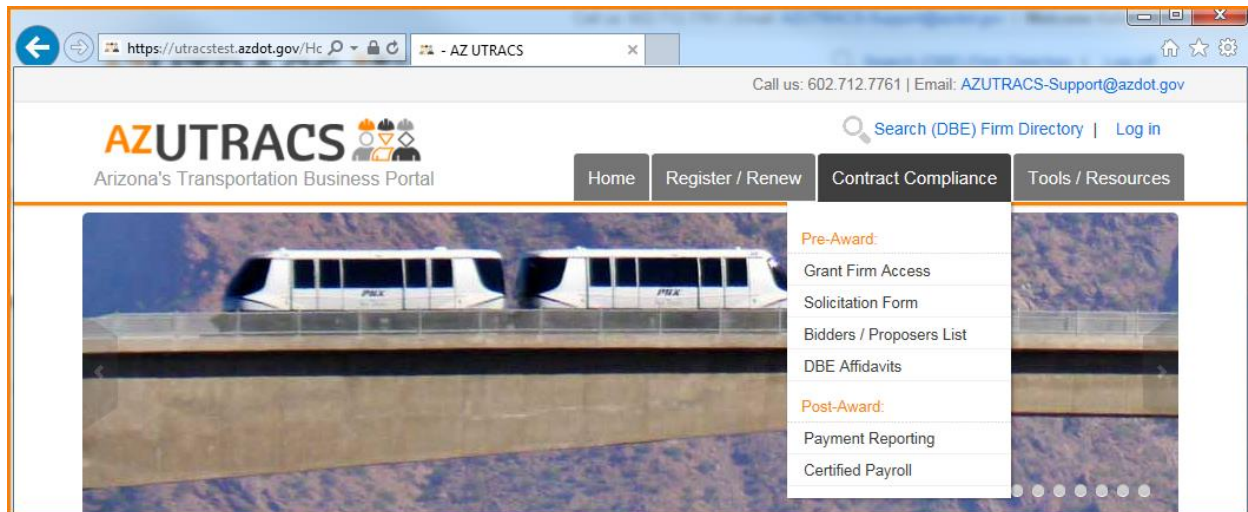
Pre-Award: Bidders / Proposers List

This will take you to the Bidders/Proposers List summary page where you can create a Bidders/Proposers List online with just a few clicks.

Pre-Award: Grant Firm Access

This will take you to the Grant Firm Access page where you can grant an individual the ability to create a Bidders/Proposers List or Solicitations on behalf of your firm.

Pre-Award: Solicitation Form

This form will allow you to solicit to other firms to partner together to work on projects leveraging the AZ UTRACS firm directory.

Pre-Award: DBE Affidavits

This will take you to the various Construction and Professional Services affidavit forms that you will need for your various bid postings and RFQ's.
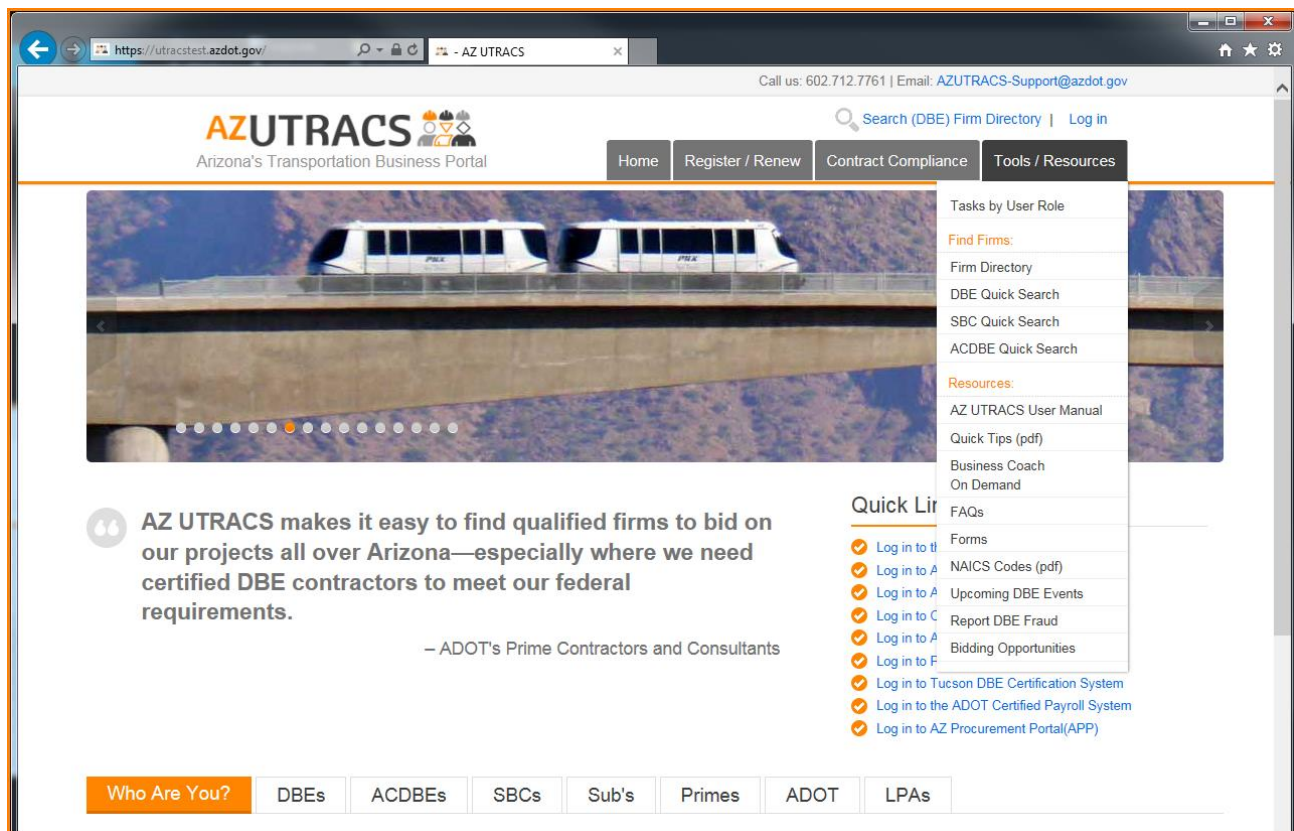
Post-Award: Payment Reporting

This will take you to the Payment Reporting information page where you can login to the payment reporting DBE system.

Post-Award: Certified Payroll

This will take you to the Certified Payroll information page where you can login to the labor compliance reporting system.

Tools/Resources

Tasks by User Role

This will take you to a page where you can select your firm role as a DBE, ACDBE, SBC, Subcontractor, Prime, ADOT Employee or LPA to see a specialized list of resources that was compiled just for you.

Find Firms: Firm Directory

This will take you to the search directory where you can see all UTRACS Registered firms. This includes SBC's, DBE's, ACDBE's and more!

Find Firms: DBE | SBC | ACDBE Quick Search

This will take you to the search directory where you can see DBE, SBC, or ACDBE (or any combination of the three) registered firms with one click!

Resources: AZTRACS User Manual

This will take you to the AZ UTRACS User Manual, a manual that provides step-by-step instructions on how to use the system and gives you pertinent information of the various functions of the system.

Resources: Quick Tips (pdf)

This will open a PDF document with brief instructions for each of the various major functions in AZ UTRACS.

Resources: Business Coach on Demand

This will direct you to Business Coach on Demand, a free resource dedicated to providing accessible guidance about how to work with ADOT, from beginning to end, tailored to your role on the project (construction or design, prime, sub, sub-prime, etc.).

Resources: **FAQs**

This will take you to a page where you can see all of the frequently asked questions that many AZ UTRACS users have.

Resources: **Forms**

This will take you to a page with links to quickly access the Construction Contractor, Engineering Consultants, Disadvantaged Business Enterprise and Local Public Agency forms.

Resources: **NAICS Codes (pdf)**

This will take you to a searchable PDF that lists all NAICS codes.

Resources: **Upcoming DBE Events**

Click here to see what DBE events are scheduled for the upcoming months.

Resources: **Report DBE Fraud**

This will take you to the Office of the Inspector General USDOT Report Fraud Hotline website to report DBE fraud.

Resources: **Bidding Opportunities**

This will take you to the ADOT site which lists all of the various websites with bid postings for the state of Arizona.

Search (DBE) Firm Directory
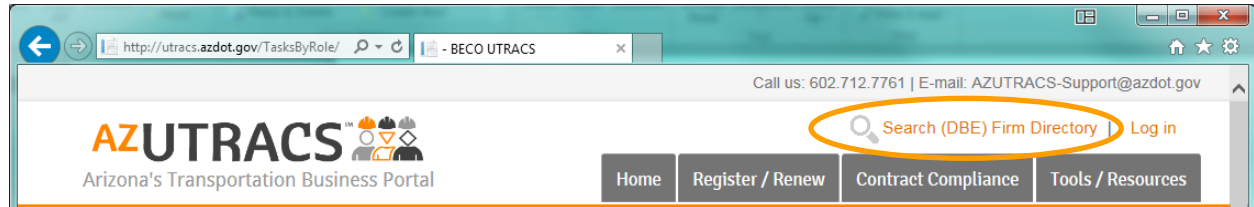
The Search (DBE) Firm Directory link will take you to the search directory where you can see all UTRACS Registered firms. This includes SBC's, DBE's and more! You can also get here by hovering over Tools/Resources and clicking Firm Directory

Log In/Off
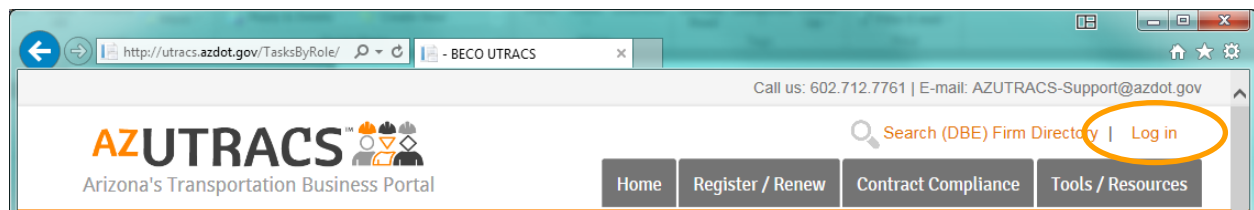
The Log in button is where you can click to login to your account. You can also change your password, register and resend your activation email here.

The Log in text will also show you whether you are logged in or not. If it says Log out you will know that you are logged in.
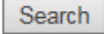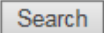
Search for a Firm or Types of Firms

By hovering over "Tools/Resources" and clicking one of the "Find Firms" options or by clicking "Search (DBE) Firm Directory" at the top of the page you will be taken to the registered firms search. Click here to see who is in the AZ UTRACS Directory.

1) The search feature allows you to search the AZ UTRACS directory, using one or multiple of the following options:
    a. A quick, one button search for all DBE's, SBC's and/or ACDBE's using the Quick Search feature


    b. Certification type (DBE/SBC/ACDBE)
        i. Searching by Certification type does not ensure that the firm meets the other criteria/ion that you select, only that they are designated as a certified firm. If you want to find firms certified in specific types of work, use the NAICS search criteria that display when either the DBE or ACDBE box is checked.
    c. Firm Name
    d. Business Description
    e. Firm Contact First and Last Name
    f. City, State, Zip Code and County
    g. AZ UTRACS Number
    h. Firm Type
    i. Work Categories (Professional/Construction/Goods and Services)

2) Once you have searched using the criteria that you need for your project, click **Search**

3) Once you have clicked **Search** you can export the results by clicking **DOWNLOAD SEARCH RESULTS TO EXCEL**

Please note!! You must have an AZ UTRACS account and be signed in to export the information generated in search results. The request to export will also be verified by a CAPTCHA to protect firm contact information.
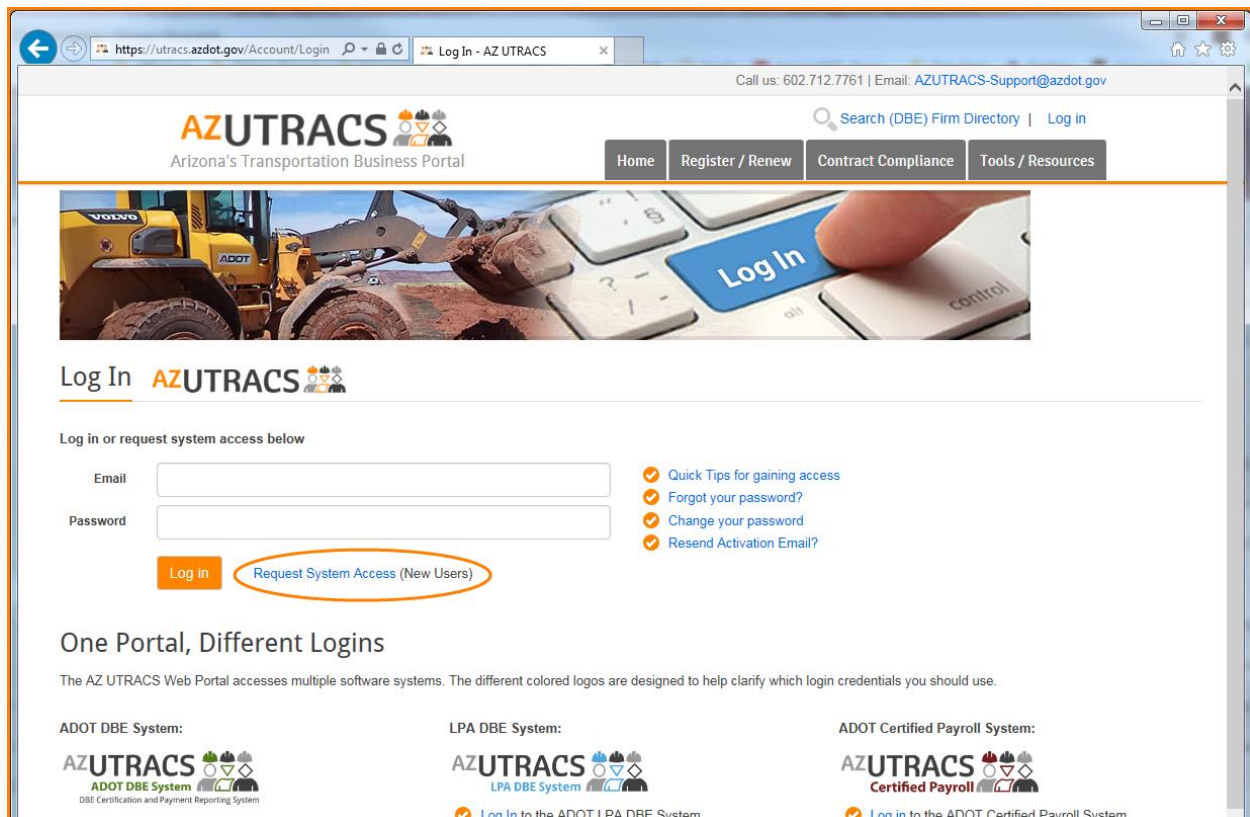
4) To start over and clear the form, click Clear Search

5) To customize the columns in the results that you see , click Customize Search Results , check or uncheck the columns that you would like to see, and click OK
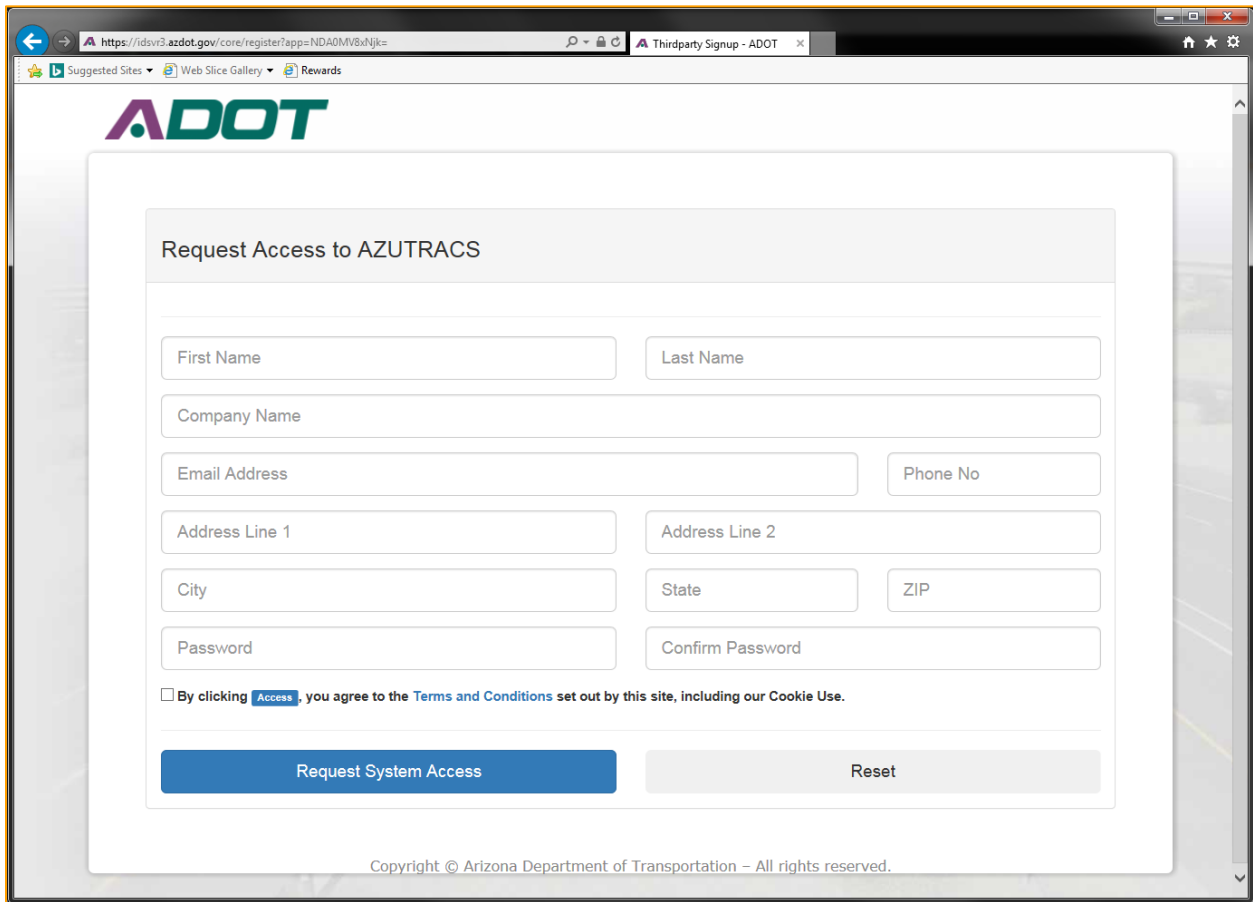
Create an Account

1) Navigate to http://www.AZUTRACS.com and click "Log in" on the top right hand corner of the website.
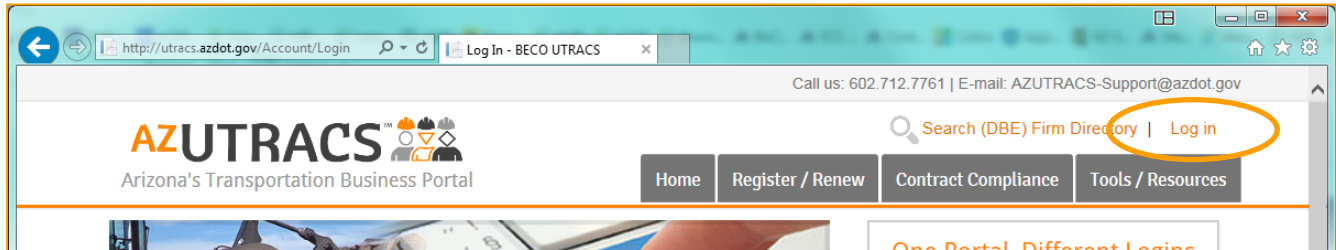

2) Select "Request System Access (New Users)"

3) Fill out the "New User Registration" form with your information, read and agree to the Terms and Conditions and select "Register."
   a. The email that you use to register will have a confirmation email sent to it. Be certain to have that email account available when you are registering.


4) Once you register you will receive the following message which will be followed by an email from admin@azdot.gov with the subject line "Welcome to ADOT."
   a. If you have not received the email within 24 hours, check your junk folder. If the email is within your junk folder you will have to move it to your inbox to click on the activation link.
   b. If you don't click on the activation email within 48 hours, you will have to request another activation email. To do this, see Resend Activation Email.
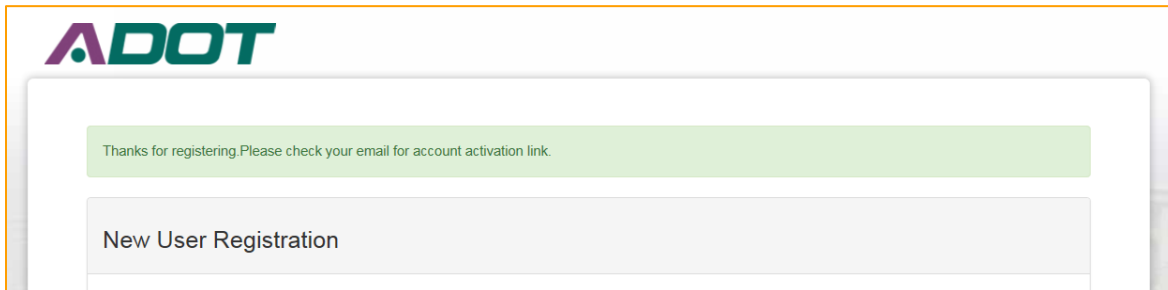
(cont.)
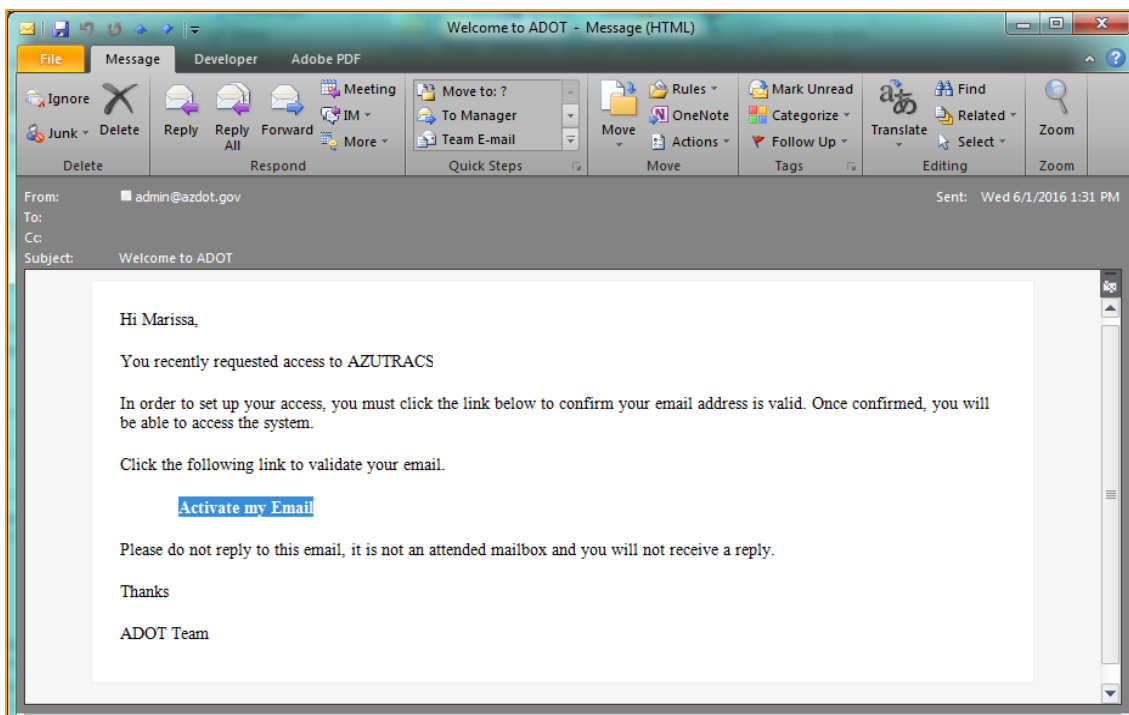
5) Click Activate my Email within the email received.
   c. As mentioned previously, if you found your email in your junk folder you may have to move it to your inbox in order to click any of the links.

6) You will then be directed to the following message:
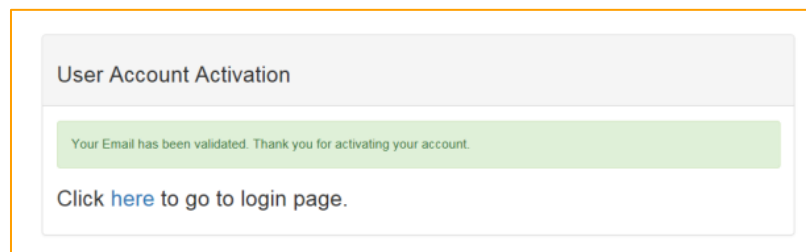
7) Congratulations! You successfully registered. Go to http://www.AZUTRACS.com/Account/Login to log in.
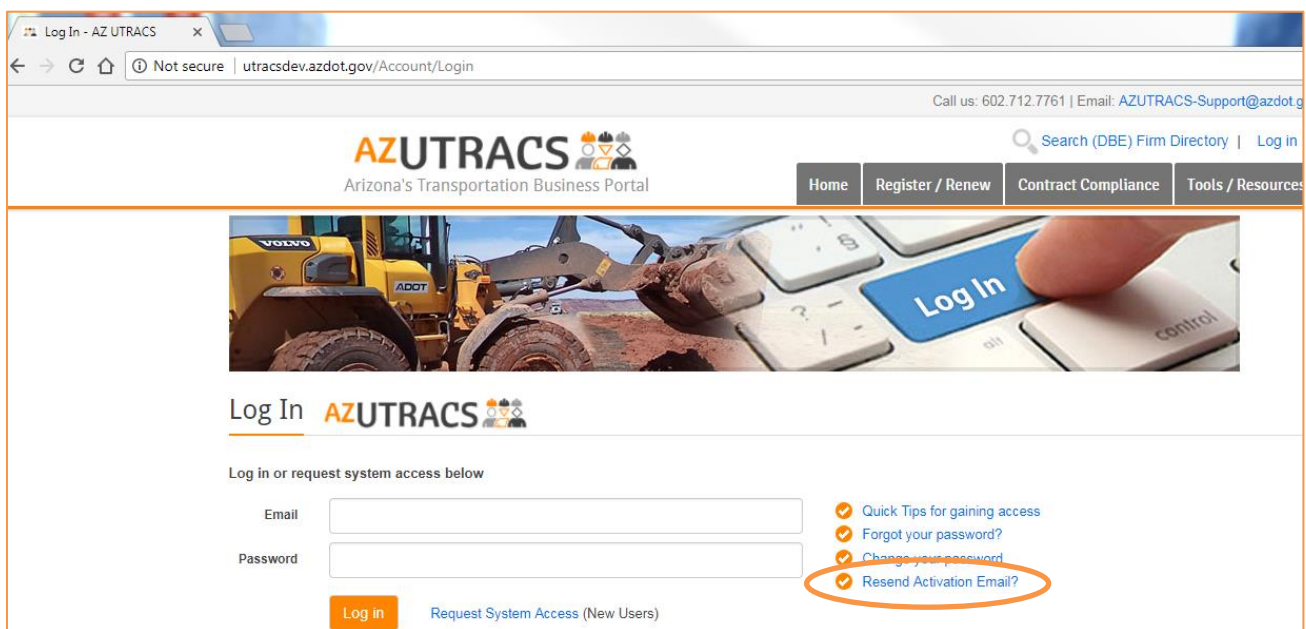
Resend Activation Email

If you were unable to click the activation email when provided access to a firm within the first 48 hours after it was sent, you will need to request another activation email.

1) Navigate to www.AZUTRACS.com and click on "Log in" in the upper right hand corner of the page
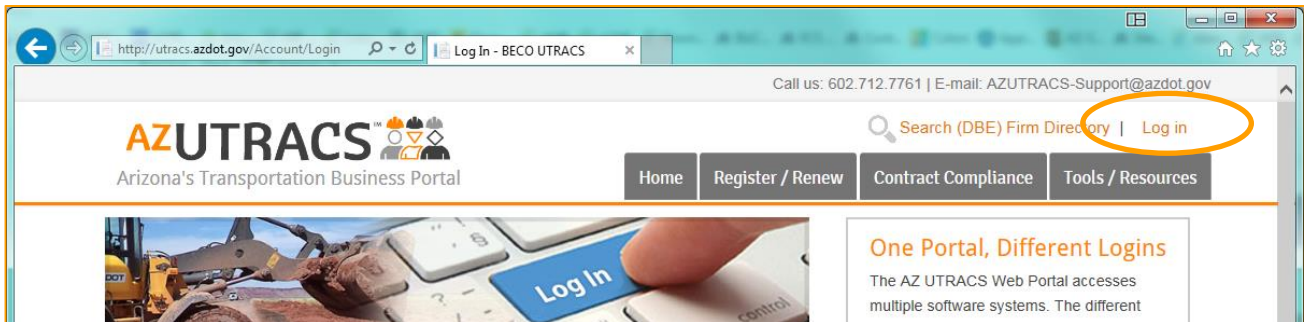
2) Click on "Resend Activation Email?

1) Retype your email in the email address field and click "Send Activation Email." To continue, head back to Create an Account.
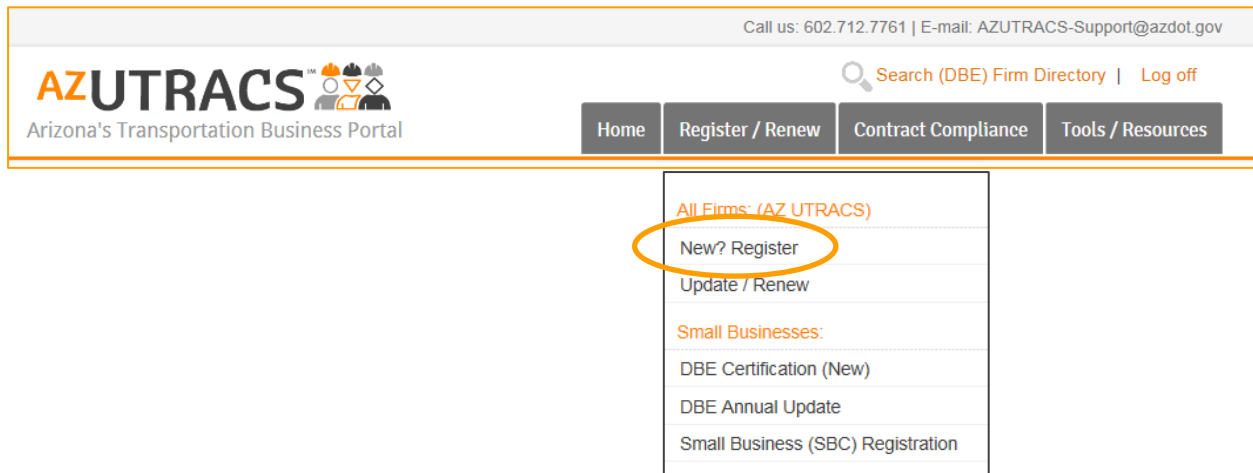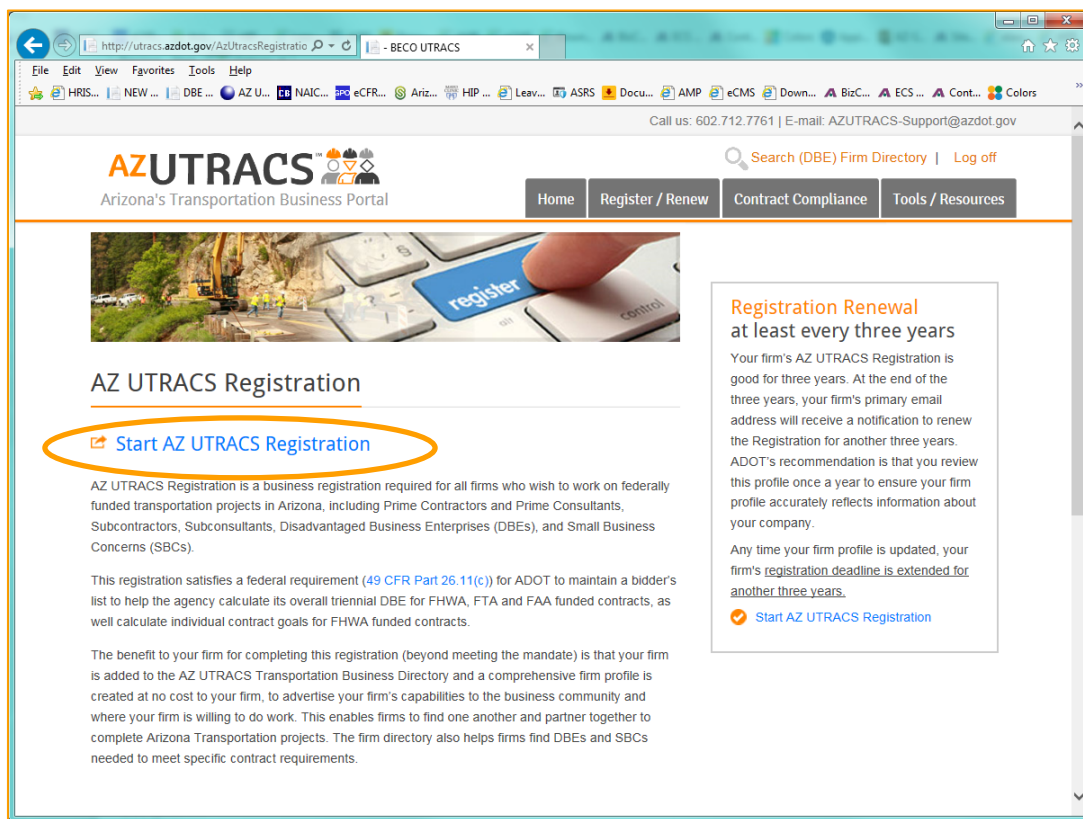
Register Your Firm in AZ UTRACS

*If your firm's information transferred from the previous UTRACS system or if your firm has already been added by someone else in your firm, you may not have to complete every step in this section. The differences are noted below.

1) After you log in, hover over "Register/Renew" on the menu bar and click "New? Register" from the drop down list.

2) Click "Start AZ UTRACS Registration".

(cont.)

3) On the AZ UTRACS Registration form, first search the dropdown list for your firm. Depending on whether you see your firm listed, or if you don't see a dropdown, proceed to either Your Firm is NOT Listed in the Registration Dropdown or Your Firm IS Listed in the Registration Dropdown.

AZ UTRACS Registration Form

Step 1: Select your firm from the dropdown, request access to an already registered firm, or create a new firm registration. You will not see a dropdown below unless you are listed as the primary or secondary contact for an AZ UTRACS registered firm. To create a new registration for a firm not yet in the AZ UTRACS system, provide the firm's Tax ID and formal business name in the form on the right to begin. If your firm already exists in the AZ UTRACS system, you may be prompted to contact the currently listed Primary or Secondary contact on the requested firm's registration. Existing users managing more than one company may also add additional firms using the form at the right.

Step 2: Complete your AZ UTRACS Registration form. Be careful to provide all of the required information marked with an asterisk (*). You will be prompted to complete any missed information prior to submitting your AZ UTRACS registration. Select all applicable work categories and, if eligible, answer the Small Business Concern questions to complete a Small Business Concern Registration in a single streamlined process. Items in orange will be displayed on your Firm's public Profile.

Step 3: Click Save and Submit.

Select firm to update/renew your registration

Begin Registration by selecting a Firm Name ▾

Request Access to Firms

AZ UTRACS Firm Directory ▾

Check the AZ UTRACS Firm Directory prior to requesting access to any firm. If the firm you are requesting access to is already registered in AZ UTRACS, contact the primary and secondary contacts listed on the firm profile page to gain access. If the firm is not yet registered in AZ UTRACS, proceed and complete the form below.

Provide the Tax ID (numbers only) and formal Firm name to request access to a firm.

Tax Id:

Formal Firm Name: ⓘ

Request Access

Your Firm is Not Listed in the Registration Dropdown

1) Find the "Request Access to Firms" section of the registration page and check to see if your firm exists in the system by doing a search in the "AZ UTRACS Firm Directory" dropdown. If your firm already exists, search for your firm in the Firm Directory and contact your firms Primary or Secondary Contact to request that they add you to the firm registration.

2) If your firm is not listed in the directory, fill out the form by providing the firm Tax ID and the Formal Firm Name. Click "Request Access."
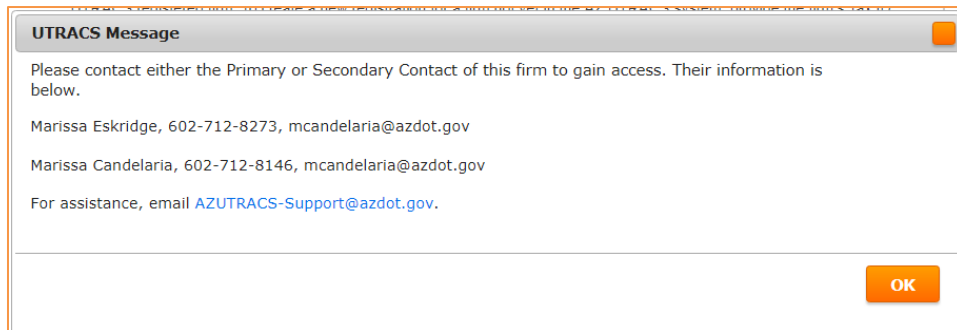

3) Once you have filled out the "Request Access to Firms" form click [Request Access] and you will receive the following message if your firm is not yet in the system:

4) If your firm is already registered, you will receive the following message with the contact information of the individual(s) who currently manage the firm's AZ UTRACS registration:

UTRACS Message

Please contact either the Primary or Secondary Contact of this firm to gain access. Their information is below.

Marissa Eskridge, 602-712-8273, mcandelaria@azdot.gov

Marissa Candelaria, 602-712-8146, mcandelaria@azdot.gov

For assistance, email AZUTRACS-Support@azdot.gov.

OK

Contact one of the individuals listed and request to be added as a Primary or Secondary contact on your firm's UTRACS registration. To update Primary and Secondary contacts, simply have one of the current Primary or Secondary contacts update the information in the Primary and Secondary contact fields under "Firm Contact Information" on the registration page.

If the individual(s) listed as the primary or secondary contact are no longer with your company, or if you have any other issues registering, email us at AZUTRACS-Support@azdot.gov.

5) Once you have gained access to your firm, continue to the next section, Your Firm IS Listed in the Registration Dropdown.

Your Firm is Listed in the Registration Dropdown

1) Select your firm name in the dropdown list. Once you select your firm*, if you are listed as a Primary or Secondary contact for your firm*, the registration form will appear just below the dropdown list for you to edit, as needed.

   a. *Take the time to thoroughly complete your application.* This is an opportunity to advertise your firm which can make finding work more likely. Primes will be searching AZ UTRACS for firms with specific qualifications and listing your own qualifications carefully can help you be found and used more frequently. The items in **bold orange** will be publicly available on your firm profile.

   b. If your firm certification details are incorrect, contact your certifying agency to update them.

AZ UTRACS Registration Form

✓ Request access to another firm

✓ Quick Tips for completing your registration

✓ To delete your AZ UTRACS firm registration, email us at AZUTRACS-Support@azdot.gov

Step 1: Select your firm from the dropdown, request access to an already registered firm, or create a new firm registration. You will not see a dropdown below unless you are listed as the primary or secondary contact for an AZ UTRACS registered firm. To create a new registration for a firm not yet in the AZ UTRACS system, provide the firm's Tax ID and formal business name in the form on the right to begin. If your firm already exists in the AZ UTRACS system, you may be prompted to contact the currently listed Primary or Secondary contact on the requested firm's registration. Existing users managing more than one company may also add additional firms using the form at the right.

Step 2: Complete your AZ UTRACS Registration form. Be careful to provide all of the required information marked with an asterisk (*). You will be prompted to complete any missed information prior to submitting your AZ UTRACS registration. Select all applicable work categories and, if eligible, answer the Small Business Concern questions to complete a Small Business Concern Registration in a single streamlined process. Items in orange will be displayed on your Firm's public Profile.

Step 3: Click Save and Submit.

Select firm to update/renew your registration

Begin Registration by selecting a Firm Name ▼

2) Once you complete filling out the registration form, click Save. Your AZ UTRACS registration will be extended 3 years every time you update your firm information.

3) You will then see the following message confirming you have saved your information successfully:
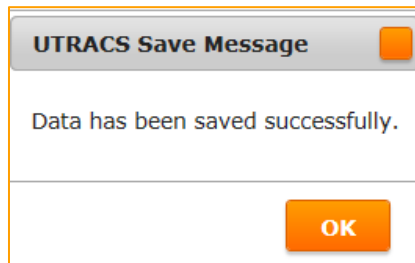
Update or Register Your Firm

*This is also where you can update your firm's Primary and Secondary contacts

After you log in, hover over "Register/Renew" on the menu bar. Select "Update/Renew" from the drop down list.
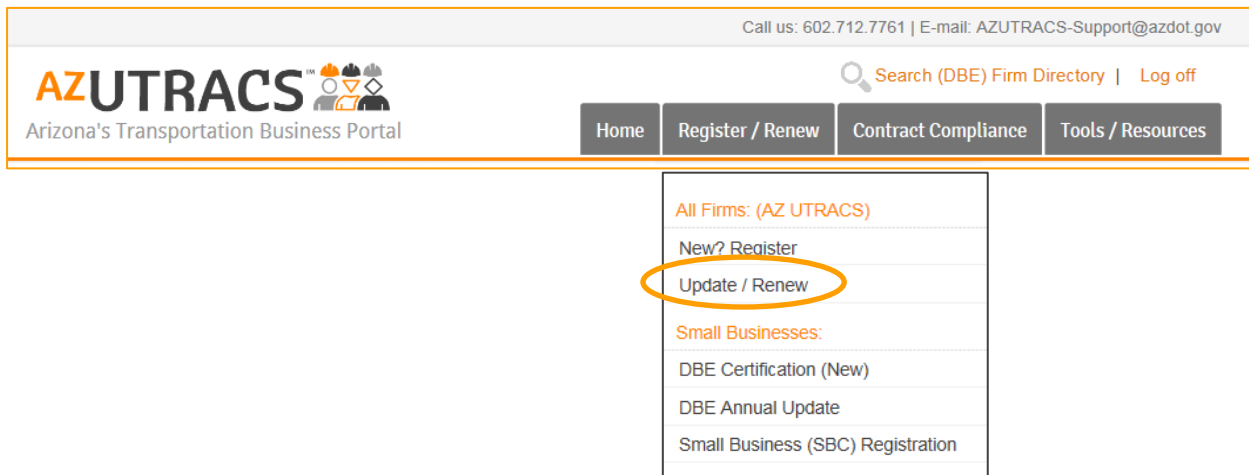
1) Select your firm from the dropdown.
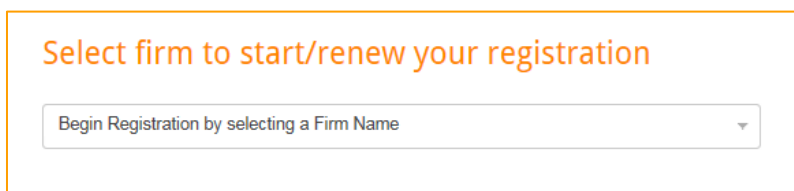
2) Once you select your firm, *if you are listed as a Primary or Secondary contact for your firm*, the registration form will appear just below the dropdown list for you to edit, as needed. Complete all of the mandatory asterisked (*) items. All the public information that will be displayed on your profile is highlighted in **bold orange**

   a. **Please note!!** Only secured (Https://) websites will be displayed as a clickable link on the firm profile for your firm website address.
   b. To update your Primary and Secondary contacts, simply update the information in the Primary and Secondary contact fields under "Firm Contact Information."

c. To add work categories, click, "Display All" and select the work categories that apply to you.

d. To add specialized equipment:
    a. Select "Type to Add Equipment" box then start typing a description of the equipment
    b. Additional details can be added to the "Additional Details" box.
    c. Add the quantity of equipment in the "Quantity" box.
    d. Once desired equipment is found click "Add Equipment"
    e. To remove unwanted equipment press the "Remove" button

3) Once you complete filling out the registration form including all of the mandatory sections marked with an asterisk (*), click save.

4) You will then see the following message and your information will be updated with the date your registration is effective until:

Add Someone to Manage Bidders/Proposers Lists and/or Create Solicitation Forms

1) After you log in, hover over "Contract Compliance" on the menu bar and click "Grant Firm Access" from the drop down list.
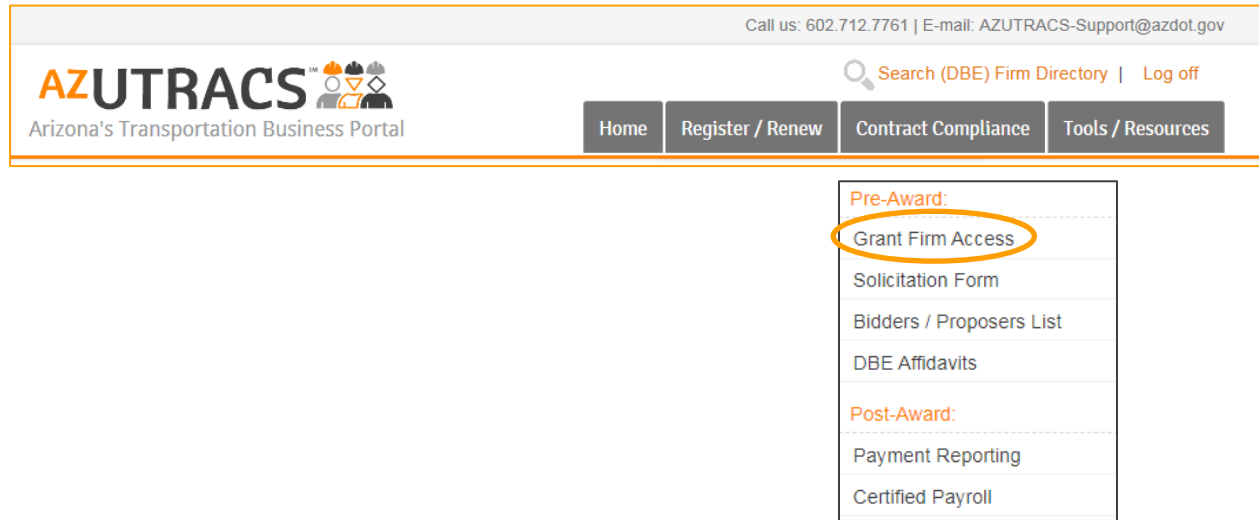
2) *If you are listed as a Primary or Secondary contact for your firm, you will see your firm's name in the dropdown.* Select your firm from the dropdown list.

5) Once you select your firm, an email section will appear just below the dropdown list where you can enter the email address of the person who you would like to have access to your firm to create Bidders/Proposers Lists and/or "Solicitation Forms" and click "Add."

   a. Only *two* users can manage the firm registration and add Bidders/Proposers List or Solicitation Form users (the primary and secondary contacts).

   b. There is no limit to the number of add Bidders/Proposers List or Solicitation Form users that you can add.

   c. The added individual will receive an email indicating that they have been granted access to the firm. They will be prompted to login or create a login if they do not have one already. Their User ID status will remain "In Process" until they log in. Once they log in their status will change to "Active."

d. This window for a new Bidders/Proposers List or Solicitation Form contact to login or create a login is 48 hours.

Grant User Access to Solicitation Form and Bidders / Proposers List

Only the Primary and Secondary Contacts are authorized to provide access to the Solicitation Form and Bidders / Proposers List users. Solicitation Form users will only be able to access the solicitation form feature and will not be able to access the firm registration page. Bidders/Proposers list users will only be able to access the bidders / proposers list feature and will not be able to access the firm registration page.

Email/User Id   [   ]   ☐ Solicitation Form Access
Primary Role   [Select a Primary Role ▼] ☐ Bidders/Proposers List Access   [Add]

		User Id	User Status	Primary Role	User Access
Edit	Delete	dzachariae@azdot.gov	In Process	Executive Staff	- Solicitation Form - Bidders/Proposers List
Edit	Delete	jgillmore@azdot.gov	In Process	DBE Liaison	- Bidders/Proposers List

Managing and Creating Bidders/Proposers Lists

After you log in, hover over "Contract Compliance" on the menu bar and click "Bidders/Proposers List" from the drop down list.

1) Click "Start or Manage a Bidders/Proposers List"
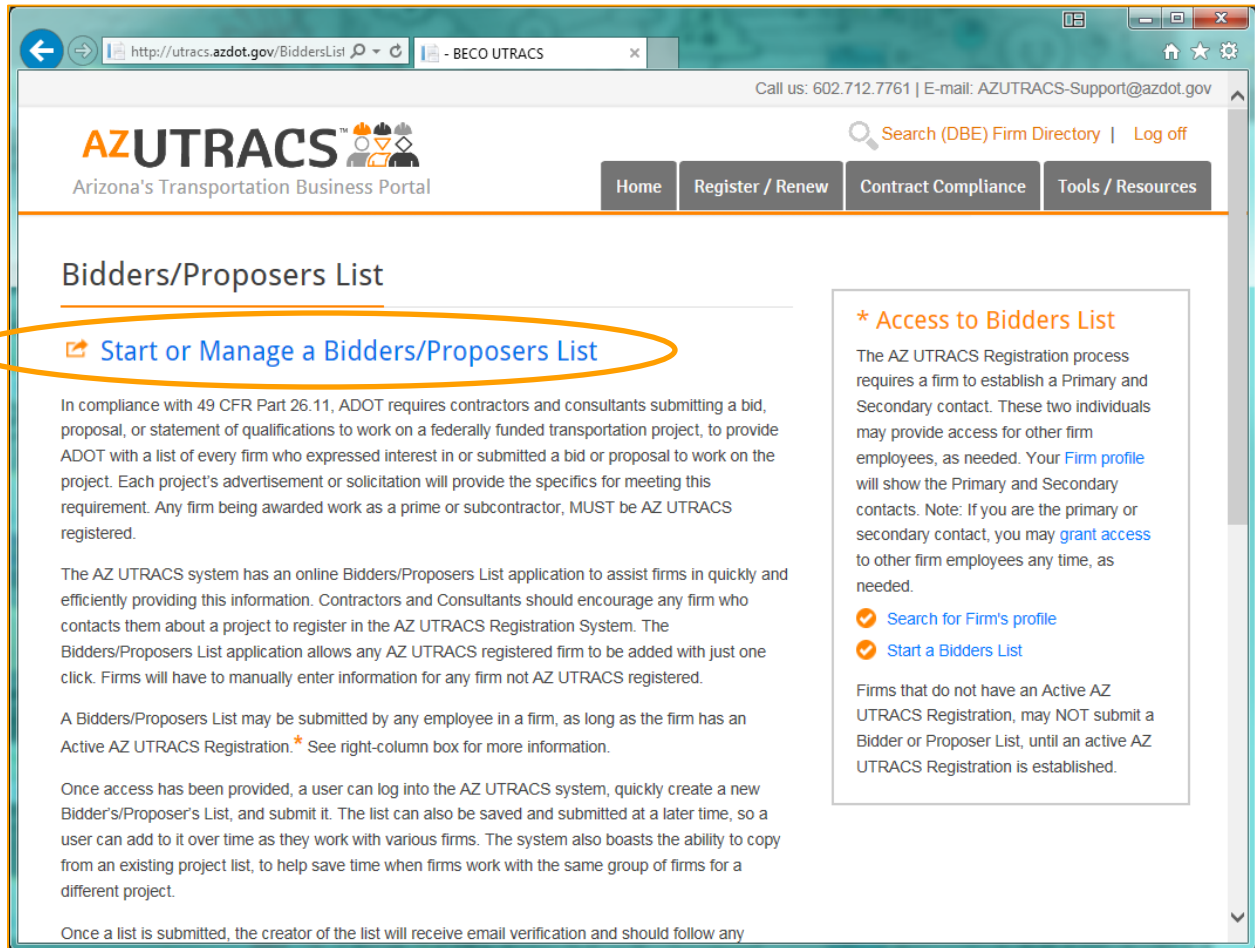
2) Select your firm from the dropdown list. You can only view firms that you are given access to as a Bidders/Proposers List contact by the firm's Primary or Secondary contact or if you are the Primary or Secondary contact yourself.

3) Once you select your firm, a new section will appear where you can choose:
   a. "Create a New List" to create a new Bidders/Proposers List
   b. "Continue an In-Process List" to view any of your incomplete lists
   c. "Open a Submitted List" to see Bidders/Proposers Lists that are already submitted.

If you don't want to submit a new List and already have Lists created, go to either [Manage In-Process Bidders/Proposers Lists](#) or [Open or Copy a Submitted Bidders/Proposers List](#). Otherwise, continue reading the next section to create a new List.

Bidders List

What would you like to do?

| Create a New List | Continue an In-Process List | Open a Submitted List |
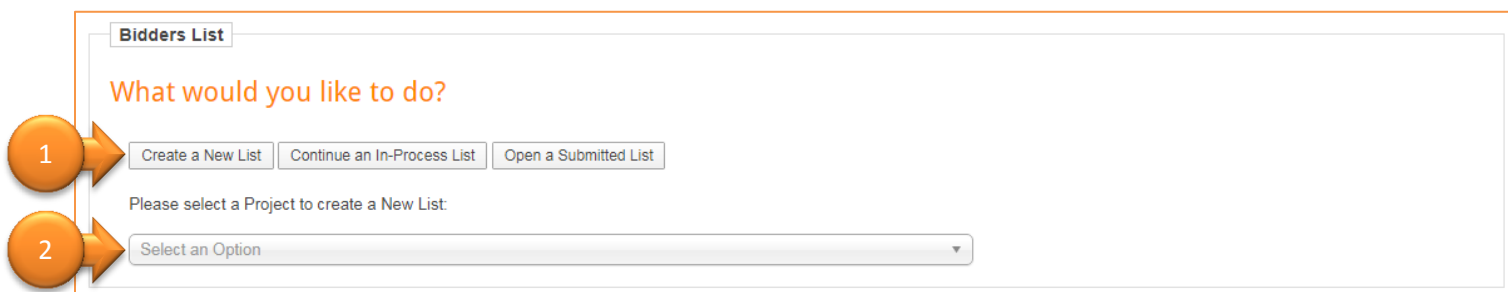
Please select a Project to create a New List:

| Select an Option ▼ |

Create a New Bidders/Proposers List

Did you already submit a similar Bidders/Proposers List? See the [Open or Copy a Submitted Bidders/Proposers List](#) to view or copy a previously submitted list into a new one.

1) Once you have selected your firm, click the "Create a New List" button and select the project that you would like to create a Bidders/Proposers List for.
   a. You can begin to type in the name of the project once the dropdown has opened. This will help you find the project quickly.

Bidders List

What would you like to do?

1 ➤ | Create a New List | Continue an In-Process List | Open a Submitted List |

Please select a Project to create a New List:

2 ➤ | Select an Option ▼ |

---

2) Once the project is selected, a Registered Firms section appears where you can select any firm in our directory to add to your List and simply click Add AZUTRACS Registered Firms

   a. Helpful Hint: You can quickly search for a firm in the drop down list by beginning to type the firm name.
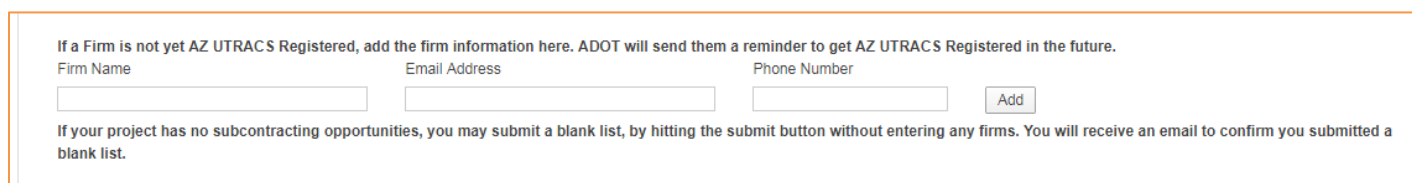
Please select an AZ UTRACS Registered Firm

Please add all firms who expressed an interest in or submitted a quote, bid, or response for this project.

| Please select a Firm to add. ▼ | Add AZUTRACS Registered Firms

---

3) If a firm is not listed in the dropdown, it means that they are not currently AZ UTRACS registered. You can easily provide the unlisted firm with a notification to register and add them to your List by providing their firm name, email address, phone number and clicking Add

If a Firm is not yet AZ UTRACS Registered, add the firm information here. ADOT will send them a reminder to get AZ UTRACS Registered in the future.

Firm Name	Email Address	Phone Number
		Add

If your project has no subcontracting opportunities, you may submit a blank list, by hitting the submit button without entering any firms. You will receive an email to confirm you submitted a blank list.

---

4) Once you add all of the firms who expressed an interest in or submitted a quote, bid, or response for this project, you can review your List and delete any unneeded firms.

5) To do this simply click the [Remove] button next to any firm name that you do not want on the List.

My Bidders List

Registered Bidders

	Firm Name	AZUTRACS Number	Expiration Date	Email	Phone
Remove	1st Resource Solutions, LLC	10052	04/20/2019	bdomke@azdot.gov	555-555-5555
Remove	2 C's Freight Broker	10068	04/14/2019	bdomke@azdot.gov	602-712-8552

6) When you are done working on your List or you can either save it to complete it at another time, or you can submit the List.
   a. Once you save, you will see the following message:

   UTRACS Save Message

   Data has been saved successfully.

   [OK]

   b. Once you submit, you will see the following message:

   UTRACS Save Message

   You have successfully created a Bidder's List. Please look for an email confirmation to be sent.

   [OK]

   c. You will also receive an email with your finalized Bidders/Proposers List for your records.

   ADOT Business Engagement and Compliance Office   Tue, Mar 31, 1:43 PM (21 hours ago)
   to me, ContractorCompliance ▾

   Marissa's Test Firm 3 Incorporated , AZUTRACS Number: 15872 has submitted a Bidder/Proposer list for **T024701R** on 03/31/2020 at 1:43 PM MST (UTC - 07:00).

   Bidders/Proposers for this firm include:

Firm Name	AZUTRACS #	Expiration Date	Email Address	Phone Number
1 Test Firm	16731	03/31/2023	@yahoo.com	999-111-3333
1299 Test	18138	03/29/2023	@azdot.gov	602-712-8273

   d. If you saved a Bidders/Proposers List and want to return to it, continue to Manage In-Process Bidders/Proposers Lists.

Please note!! Only customer support can recall a submitted Bidders/Proposers List. Once a Bidders/Proposers List is recalled it will be placed back in the "Continue an In-Process List" tab, the original submittal will be invalidated. Once recalled, you or someone at your firm will be able to make modifications and **resubmit** the Bidders/Propsers List. The list must be submitted again prior to the project specific deadline to successfully fulfill the Bidders/Proposers List requirement. Contact us at (602)771-7761 or email Customer Support at AZUTRACS-Support@azdot.gov to request that a submitted Bidders/Proposers list be recalled.

Manage In-Process Bidders/Proposers Lists

If you have not created a Bidders/Proposers List yet, please see Create a New Bidders/Proposers List.

1) Once you have selected your firm click the "Continue an In-Process List" button and select the project that you would like to continue a Bidders/Proposers List for.
   a. You can begin to type in the name of the project once the dropdown has opened. This will help you find the project quickly.
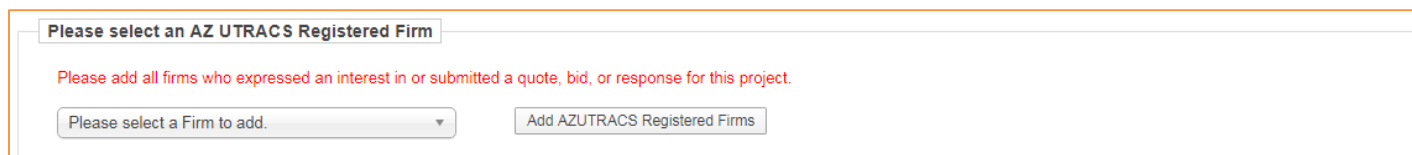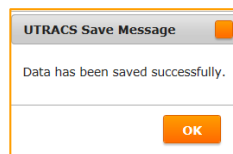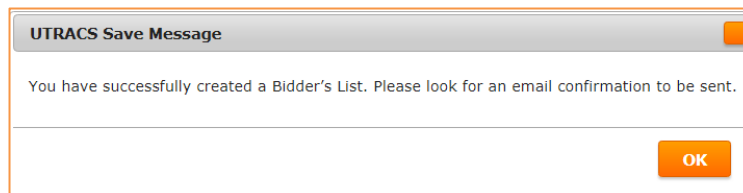

2) Once you select the Bidders/Proposers List by project name, the "My List" section will appear below the dropdown.

3) You can continue to add the AZ UTRACS registered and unregistered firms quickly and easily just as you did in the Create a New Bidders/Proposers List section.

4) Submit your Bidders/Proposers List when you are ready, or continue to save and return to edit it until it is complete to your satisfaction.
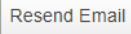
Open or Copy a Submitted Bidders/Proposers List

If you have not created a Bidders/Proposers List yet, please see Create a New Bidders/Proposers List.

1) Once you have selected your firm, click the "Open a Submitted List" button and select the project that you would like to view the Bidders/Proposers List for.

a. You can begin to type in the name of the project once the dropdown has opened. This will help you find the project quickly.

Bidders List

What would you like to do?

[Create a New List] [Continue an ...] **1** → [Open a Submitted List]

Please select a Project to create a New List:

2 → [Select an Option ▼]

2) Once you select the Bidders/Proposers List by project name, the "My List" section will appear below the dropdown. You won't be able to make changes, however, two buttons will be at the bottom of the page, Resend Email and Copy Into New List.

a. To resend the confirmation email, click [Resend Email] .

b. To copy the List into a new List, click [Copy Into New List] and new section will pop up. Select the project that you would like to copy the Bidders/Proposers List to, and click [Initiate Copy]

Bidders List

What would you like to do?

[Create a New List] [Continue an In-Process List] [Open a Submitted List]

Please select an Active (Submitted) List:

[T024701R Fourth St/Cedar Ave/Lockett Rd Roundabout [Active] (meskridge@azdot.gov) ▼]

Please select the project you wish to copy to:

[Select an Option ▼]

[Initiate Copy]

Please note!! Only customer support can recall a submitted Bidders/Proposers List. Once a Bidders/Proposers List is recalled it will be placed back in the "Continue an In-Process List" tab, the original submittal will be invalidated. Once recalled, you or someone at your firm will be able to make modifications and **resubmit** the Bidders/Propsers List. The list must be submitted again prior to the project specific deadline to successfully fulfill the Bidders/Proposers List requirement. Contact us at (602)771-7761 or email Customer Support at AZUTRACS-Support@azdot.gov to request that a submitted Bidders/Proposers list be recalled.

Managing and Creating Solicitations

After you log in, hover over "Contract Compliance" on the menu bar and click "Solicitation Form" from the drop down list.
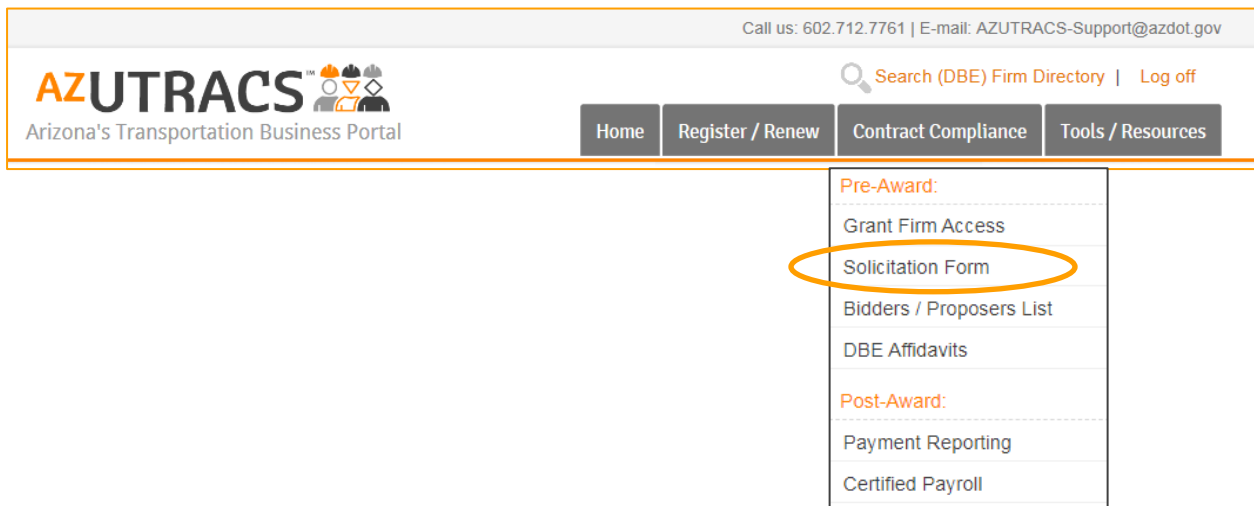
1) Click "Start or Manage a Solicitation Form"
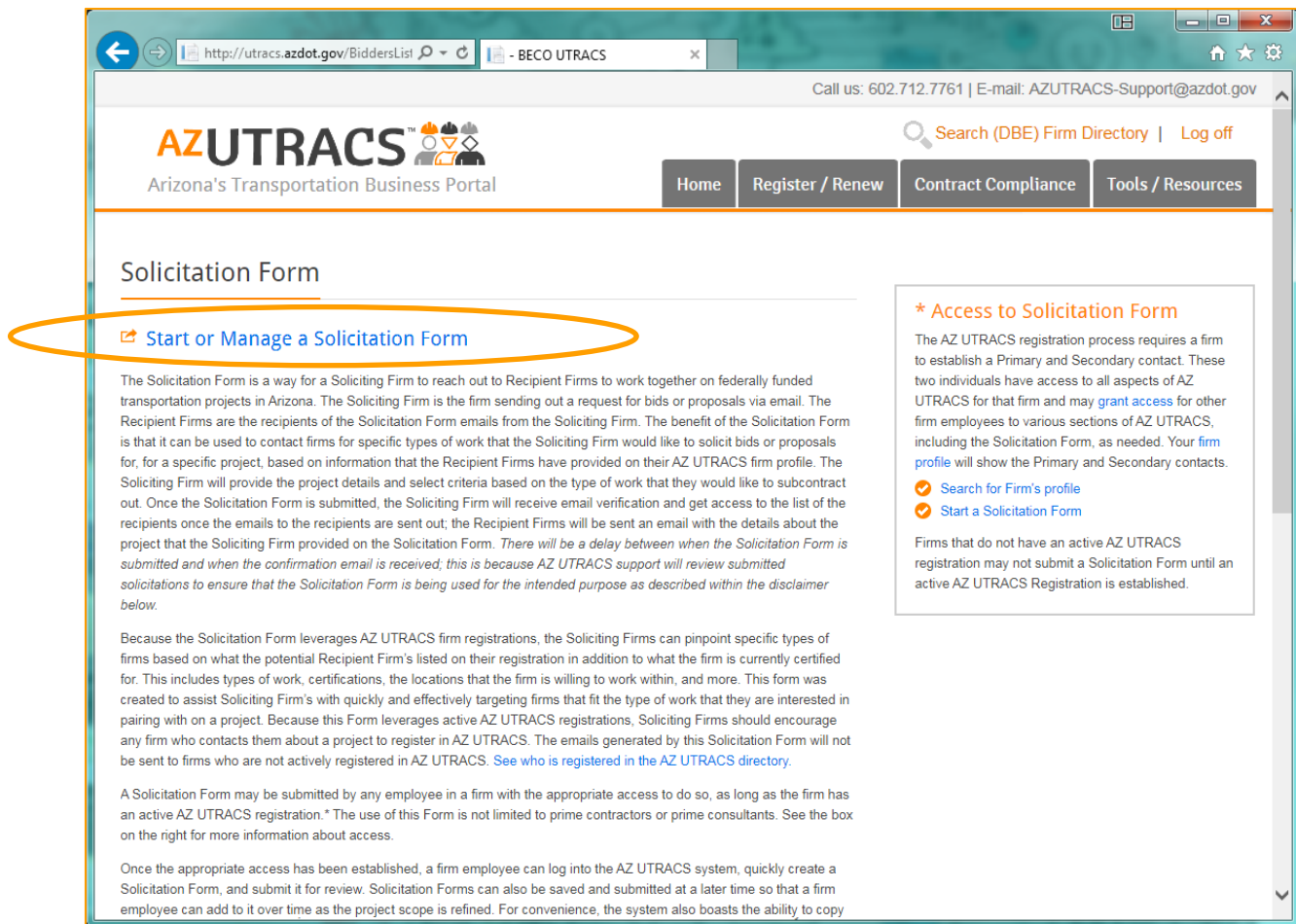
2) Click [Proceed] after reading the acknowledgement and select your firm from the dropdown list. You can only view firms that you are given access to as a Solicitation Form contact by the firm's Primary or Secondary contact or if you are the Primary or Secondary contact yourself.

3) Once you select your firm, a new section will appear where you can choose:
   a. "Create a New Solicitation" to create a new Solicitation
   b. "Continue an In-Process Solicitation" to view any of your incomplete Solicitations
   c. "Open a Submitted Solicitation" to see or copy Solicitations that are already submitted.

   If you don't want to submit a new Solicitation and already have Solicitations created, go to either Manage In-Process Solicitations or Open or Copy a Submitted Solicitation. Otherwise, continue reading the next section to create a new Solicitation.

Create a New Solicitation

Did you already submit a similar Solicitation? See the Open or Copy a Submitted Solicitation to view or copy a previously submitted Solicitation into a new one.

1) Once you have selected your firm, click the "Create a New Solicitation" button in the "What would you like to do" menu then, select the project that you would like to create a Solicitation for.
   a. You can begin to type in the project number or name once the dropdown has opened. This will help you find your contract quickly. **Please note!!** The dropdown may appear blank; scroll or type to find the project.

Solicitation Form

What would you like to do?

1 ➤ [Create a New Solicitation] [Continue an In-Process Solicitation] [Open a Submitted Solicitation]

Please select a Submitted Solicitation:

2 ➤ [Please select a Submitted Solicitation ▼]

2) Once the project is selected, a disclaimer will appear stating "You are about to create a new Solicitation Form, press OK to continue." Click "OK" to continue and the Solicitation details section will open.

   a. Once the project has been selected, the top of the form will collapse and ◀▶ will appear under the firm dropdown menu. You can reopen that section by clicking the buttons ◀▶.

3) For the Solicitation Details, complete all the required asterisked (*) fields and any optional fields. This information provides the recipient firms the necessary project details about the Solicitation.
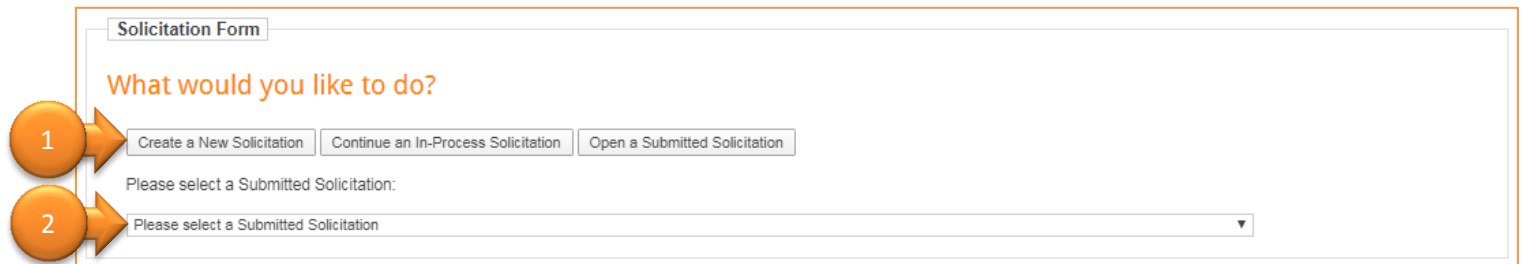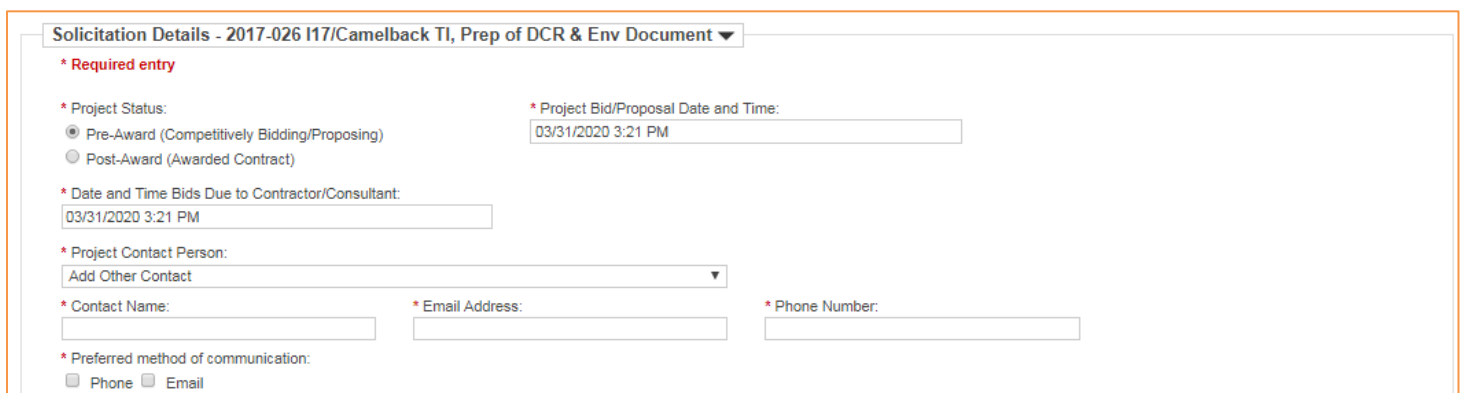
   a. For the "Project Status," indicate whether the solicitation is "Pre-Award" or "Post-Award."

   b. Specify the "Project Bid/Proposal Due Date and Time" due to the agency advertising the project, such as ADOT or the City of Phoenix.

   c. Specify the "Date and Time Bids Due to Contractor/Consultant" which is the date and time that the recipient firms need to respond to your Solicitation by.

   d. Specify the designated Solicitation "Contact Person." This is the person at your firm that will receive responses from the Solicitation recipients firm and will be listed as the "From" address on the email that the recipient firms receive.

   e. Specify how the designated Solicitation contact person would like to be contacted (Phone and/or Email)

Solicitation Details - 2017-026 I17/Camelback TI, Prep of DCR & Env Document ▼

* Required entry

* Project Status:
- ⦿ Pre-Award (Competitively Bidding/Proposing)
- ○ Post-Award (Awarded Contract)

* Project Bid/Proposal Date and Time:
`03/31/2020 3:21 PM`

* Date and Time Bids Due to Contractor/Consultant:
`03/31/2020 3:21 PM`

* Project Contact Person:
`Add Other Contact ▼`

* Contact Name: | * Email Address: | * Phone Number:

* Preferred method of communication:
- ☐ Phone ☐ Email

4) Complete the optional Bid Documents link section, if applicable.

   a. The Bid/Proposal Documents section is for you to provide a link and message for the recipient firms to give instructions on how to access those documents, if additional information is necessary for the recipient firms to access the documents.

   i. The link must be to a secure website, this means that the link must start with Https://.

Bid/Proposal Documents:

Provide link to website(must be https:)   `https://www.`   ⚠

Provide custom message for bid/proposal document link:

Characters Remaining: 500

5) Select a County/Counties.
   a. The selection of a county does not exclude firms that are not located in the project county/counties. This selection will affect results based on the county/counties that the recipient firms said they are *willing to work within*. For example, if the project spans two counties, firms that indicated that they are willing to work in one, the other, or both counties, will remain on the potential recipient list.
   b. **Please note!!** If you decide to change the county after the intial selection, you will need to click the "Save and Continue" button again to continue, however, your previous work will be saved.

6) Once you complete the Solicitation Form details, click [Save and Continue], and the rest of the form will open.

7) Next, add and remove Search Criteria to create Result Sets using the Search Criteria section
   a. The Search Criteria displays all of the options available for targeting specific firms, based on the qualifications they say they have on their self-registration, or what they are certified for (based on their AZ UCP certification records).
      i. *DBE/ACDBE/SBC* – These check boxes will only select firms that are a DBE, ACDBE, or SBC. **It does not ensure that the firm is certified in the other criteria that you select.** To target firms that are certified in specific types of work, use the NAICS Code(s) and Description(s) section.
      ii. *Construction and Engineering Design & Professional Services Work Categories* – These dropdowns will select firms that said that they can perform that work on their self-registration.
      iii. *Firm Type* – This dropdown will select firms that said that described their firms with that type on their self-registration. This section can be useful when targeting firms that are prequalified, for example.
      iv. *NAICS Code(s) and Description(s)* – This section applies to DBE and ACDBE certified firms only. This will select firms that are certified in the work that is selected based on their Arizona UCP certification record
      v. *Goods and Services* – This section is based on an open-text field on the firm self-registration, because of that, results will vary. Type in the fewest letters possible, for example, "janitor," which will pull all of the items in the Goods and Services image below when you click [Find]. Use the results when you click [Find] to guide you and help you refine the search for Goods and Services and apply the results when you are ready.

UTRACS System Message

List of matching Goods and Services
Biohazard, Construction, Janitor
Commerical Janitorial Services
Janitorial
Janitorial Services
Janitorial, Construction Clean
Janitorial, Transport, Home Care
tool & janitorial sales

APPLY RESULTS   CANCEL

8) The Search Criteria Selections section acts as a staging area for you to view, add, and remove criteria for building a single Result Set. More information on Result Sets below. When you select an item from the Search Criteria, it will show up in the Search Criteria Selections. To remove an item, click on the black "x" next to it.

9) Once you add your Search Criteria, click [Create Search Result]. You will see a Result Set pop up in the Criteria Result Section more on the Criteria Result and Result Set sections below.

10) The Criteria Result section includes the County/Counties, the Total Number of Firms, and the Result Set(s).
   a. The County/Counties selected on the Solicitation Detail Section for where the project is located will appear here.
   b. Total Number of Firms is the number of firms that the entire Solicitation will reach. If a single firm fits into two or more of the Result Sets, that firm will only be counted and emailed once. For this reason, the Result Set "Number of Firms" totals may not add up to the "Total Number of Firms."
   c. Result Sets show you how many firms meet the criteria you selected for that specific result set. **You should use the least amount of criteria possible in each result set.** All the criterion that you put into a Result Set work together. This means that if you select "DBE", a NAICS of "484220 - Gravel hauling, local", and a NAICS of "484220 - Sand hauling, local" it will search for firms that meet ALL three of those criterion. In general, fewer selections is better.
   d. You can edit and delete individual result sets at any time. There is no limit to the number of Result Sets you can add.

11) Solicitation Message: This section is designed for the Soliciting firm to provide further information to the recipients about the project or any instructions on obtaining necessary documents. For example, some firms have open houses and want to encourage firms to attend them by using this message.

12) When you are done working on your Solicitation form you can:
    a. "Save" which will save the Form so you can return to complete it at another time
    b. "Submit for Approval" which will send the Solicitation to AZ UTRACS support for review
    a. "Preview" which will display the email that the recipient firms will receive
    b. "Delete" which will delete the the form.

13) Once submitted, the Solicitation form will be sent to AZ UTRACS Support for review. Because Solicitations can be sent to a lot of recipients, customer support reviews submittals for spam or inappropriate messages to protect AZ UTRACS firms. More information is available in the disclosures on the Solicitation Form page. **Please note!!** Once a Solicitation is approved, it cannot be recalled.

14) When the Solicitation review is complete and approved, the Primary and Secondary contact for each of recipient firm will be sent an email with the details of the Solicitation. The firm that sent out the Solicitation will receive a confirmation and a link with instructions about how to retrieve the list of recipients.

Manage In-Process Solicitations

If you have not created a Solicitation yet, please see Create a New Solicitation.

1) Once you have selected your firm click the "Continue an In-Process List" button and select the project that you would like to continue the Solicitation List for.
    a. You can begin to type in the name of the project once the dropdown has opened. This will help you find the project quickly.

2) Once you select the Solicitation by project name, the rest of the Solicitation Form will appear below the dropdown.

3) You can continue to add Result Sets and project details quickly and easily just as you did in the Create a New Solicitation Form section.

Submit your Solicitation Form when you are ready, or continue to save and return to edit it until it is completed to your satisfaction.

Open or Copy a Submitted Solicitation and/or View Solicitation Recipients
If you have not created a Solicitation yet, please see Create a New Solicitation.

1) Once you have selected your firm, click the "Open a Submitted List" button and select the project that you would like to view a Solicitation Form for.
   a. You can begin to type in the name of the project once the dropdown has opened. This will help you find the project quickly.

2) Once you select the Solicitation Form by project name, the entire Solicitation section will appear in below the dropdown. You won't be able to make changes, however, four buttons will be at the bottom of the page, "Preview", "Copy Into New Solicitation," Export Recipients," and "Resend Email."
   a. To preview the email that was sent to the recipient firms, click ⃞Preview
   b. To copy the Solicitation into a new project or to resend another Solicitation for the same project, click ⃞Copy Into New Solicitation , and a new window will pop up. Select the project that you would like to copy the Solicitation to, and click ⃞INITIATE COPY
   c. To resend the confirmation email, click ⃞Resend Email

Please note!! You can send multiple Solicitations for the same project. Use the project dropdown to determine which Solicitation is which. The project list is sorted, newest to oldest, for your convenience. You can also see the status of the Submitted Solicitations. "Submitted" means that it is pending review, "Approved" means that the emails were sent.

Still can't find what you need?

Let us help!

Call us at the BECO office at (602) 712-7761 or

Email us at AZUTRACS-Support@azdot.gov