

# Review and Respond to a Performance Evaluation (PE)

Learn about contract PEs, the evaluation process, and how to accept or dispute a PE.

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## 1. What is a Performance Evaluation (PE) in PASSPort?

A Performance Evaluation (PE) in PASSPort is a **formal record of a vendor's performance on a contract** with the City of New York. PEs are essential for evaluating vendor responsibility and informing decisions on contract awards, extensions, renewals, and terminations.

A standard PE in PASSPort provides vendors with an overall **PE Rating** (Unsatisfactory-Excellent) and an **evaluation scorecard** that details sub-category ratings and numerical scores (0-100) in three evaluation categories:

- Timeliness of Performance
- Fiscal Administration and Accountability
- Overall Quality of Performance

Vendors have **15 calendar days** to review and respond to the PE. This timeframe provides vendors the opportunity to review the evaluation and respond or dispute the ratings before it becomes part of their official PASSPort vendor record. After 15 days, unless the vendor disputes the PE and the Agency decides further action is needed, the PE is finalized and permanently recorded in PASSPort.

## 2. Who Benefits from PEs?

Performance Evaluations provide valuable performance insights that support **contract compliance** and drive **continuous improvement** for vendors, agencies, and the City as a whole.

Vendors benefit from PEs in that they receive clear feedback on areas for improvement, fostering accountability and transparency. PEs also recognize vendors with a strong track record, strengthening their reputation and building trust with agencies.

### 3. The PE Process: An Overview

- When a vendor is awarded a contract, the contracting Agency establishes **performance objectives and evaluation criteria** to assess the vendor’s work.
- Throughout the contract term, agencies monitor vendor performance and **at least** once per year, the Agency must complete a **formal PE** (except for certain exempted contracts).
- Once the Agency creates the PE, the vendor’s designated Vendor Admin(s) is notified by email and has 15 calendar days to **review and respond to the PE**. After 15 days, unless the vendor disputes the PE and the Agency decides further action is needed, the PE is finalized and permanently recorded in PASSPort.

### 4. PE Ratings Explained: How Scores Determine Ratings

When evaluating a vendor’s work, agencies assign **numerical scores** (0–100) to each evaluation question, with 100 being the best.

PASSPort then displays those individual question scores and determines the scores and ratings for the three evaluation categories, Timeliness of Performance, Fiscal Administration and Accountability, and Overall Quality of Performance, as well as the **score and rating** for the PE overall (PE Rating).

Here are the possible score ranges and how to they translate into ratings:

Score Range	Rating	What It Means
80.1 to 100	Excellent	Far above standard
60.1 to 80	Good	Above standard
40.1 to 60	Satisfactory	Meets standard
20.1 to 40	Poor	Below standard
0 to 20	Unsatisfactory	Far below standard

**Example:** The overall PE Rating is **Excellent**, based on an overall numerical score of **90**. Since a score of 90 falls within the 80.1–100 range, it qualifies as Excellent.

The overall **PE Rating** (“Excellent”) is based on the overall PE score (“90”).

Category / Subcategory	Rating
Timeliness of Performance	Good
Fiscal Administration and Accountability	Excellent
Performance and Overall Quality	Excellent

Label	Status	Score	Answered by
PE78 22 September	Approved	90	Batson Alex

1 Result(s)

The overall PE score (“90”) determines the overall **PE Rating** (“Excellent”).

## 5. How to Review and Respond to the PE within 15 Days



The steps below can be completed by users provisioned with this role:  
**Vendor Admin**

Once an Agency has published the PE in PASSPort, all vendor contacts with a Vendor Admin role receive an email notification with a prompt to review the PE and can view the task in the Open Workflow Tasks section of their PASSPort homepage.

**Important: Vendors have 15 calendar days to review and respond to the PE! After the 15 days have passed, and unless the vendor disputes the PE and the Agency decides further action is needed, the PE is finalized and permanently recorded in PASSPort.**

1. Once you've received a PASSPort notification that a PE is ready for your review, [log in to PASSPort](#) and click the **pencil** icon to open the PE in the **Open Workflow Tasks** section.

Don't see the task? Click the **hyperlink** above the table ("See .. results") to view all tasks.

The screenshot shows the PASSPortCentral homepage. The top navigation bar includes 'Profile', 'Tasks', 'RFx', 'Contracts', 'Ordering', 'Catalogs', 'Financials', 'Performance', and 'Support'. The 'Performance' menu is open, showing 'Manage my Performance'. The main content area has an 'Announcement' section on the left and a dashboard with icons for 'Vendor Contacts', 'Vendor Information', 'Commodity Enrollment', 'Browse Public Rfx', 'Create Invoice', and 'Disclosures'. Below these are two sections: 'Vendor Check List' and 'Open Workflow Tasks'. The 'Open Workflow Tasks' section has a table with columns: Edit, Process, Title, Action, Assigned date, and Status. The table contains three rows: 'Subcontractor Approval' (2/27/2025), 'Contracts' (2/27/2025), and 'Performance Evaluation' (1/4/2024). The 'Performance Evaluation' row is highlighted with a red circle and a '1' in a red circle. A red arrow points to the 'See 150+ results' link above the table.

Edit	Process	Title	Action	Assigned date	Status
	Subcontractor Approval	Subcontractor Approval--Subcontractor Approval Demo--"D" YARD INTERNATIONAL, INC-#1 LANDSCAPING CORP	Vendor Submission	2/27/2025	
	Contracts	12524B0013-Competitive Sealed Bid - "D" YARD INTERNATIONAL, INC	Vendor Document Submission	2/27/2025	
	Performance Evaluation	PE65 18 January	Vendor Response	1/4/2024	

Another way to find the PE is to click **Performance** in the top navigation menu and select **Manage My Performance** from the drop-down menu.

The screenshot shows the PASSPortCentral homepage with the 'Performance' menu open. A red arrow points to the 'Manage my Performance' option in the drop-down menu. The rest of the page content is the same as in the previous screenshot.

2. Review the PE information and category results:

- **Label:** The name of the PE or PE title.
- **Description:** Additional information regarding the PE.
- **Evaluation Period:** The period being evaluated.
- **Evaluation Period Begin Date:** The beginning date of the period being evaluated.
- **Evaluation Period End Date:** The end date of the period being evaluated.
- **Status:** The status will always be Vendor Review for any PEs sent to you for review.
- **PE Rating:** The combined score from all three categories, also known as the overall score.
- The ratings for each individual category:
  - **Timeliness of Performance**
  - **Fiscal Administration and Accountability**
  - **Performance Overall Quality**

Questionnaire : PE78 22 September

2 Close Dispute Accept

**Label**  
PE78 22 September

**Evaluation Period Begin Date**  
9/22/2023

**Description**  
TEST

**Evaluation Period End Date**  
10/12/2023

**Status**  
Vendor Review

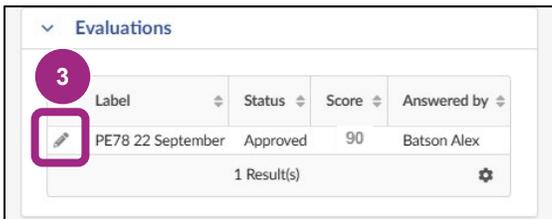
**Evaluated Period**  
2024

**PE Rating**  
Unsatisfactory

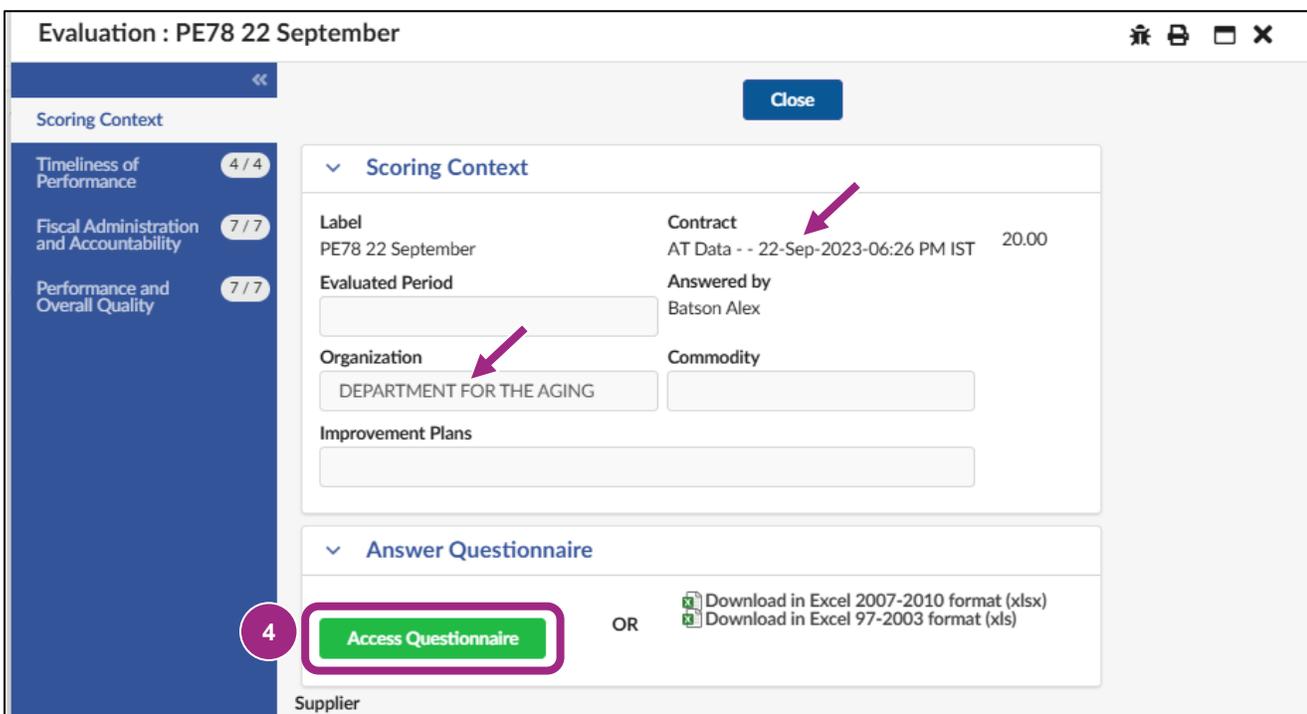
Category / Subcategory	Rating
Timeliness of Performance	Unsatisfactory
Fiscal Administration and Accountability	Unsatisfactory
Performance and Overall Quality	Unsatisfactory

3. Scroll down to the **Evaluations** section (it displays the overall numerical PE score) and click the **pencil** icon to access the PE scorecard.

**Note:** Any previously received PEs will display in this section as well.



4. The PE displays, including the contract information and the issuing Agency. Click the green **Access Questionnaire** button to view the evaluation details and scores.



**Note:** The questions, answers, and comments for the entire questionnaire can be downloaded to your computer in Excel format by clicking the Excel icons.

5. Review the evaluation details listed in all three evaluation categories of the scorecard.

**Example:** The Agency completed Question 1.1 with the answer “No”.

Evaluation : PE78 22 September

Scoring Context

Timeliness of Performance 4 / 4

Fiscal Administration and Accountability 7 / 7

Performance and Overall Quality 7 / 7

Close

Timeliness of Performance

Question 1.1 2.00

Was the contract work completed on time, and if ongoing, is the vendor appropriately adhering to schedules and milestones?

Score

Yes

No

Question 1.2 2.00

If the vendor was given any extensions of time, were any such extensions reasonable?

**Note:** If an Agency entered any explanation, it displays in the **Comment** field.

**Example:** The Timeliness of Performance category displays a score of **20.00** which translates to a subcategory rating of **Unsatisfactory**.

Timeliness of Performance Rating 20.00

Score

Excellent

Good

Satisfactory

Poor

Unsatisfactory

Comment

Unsatisfactory

6. Click the **Close** button once you've reviewed the PE details.

Evaluation : PE78 22 September

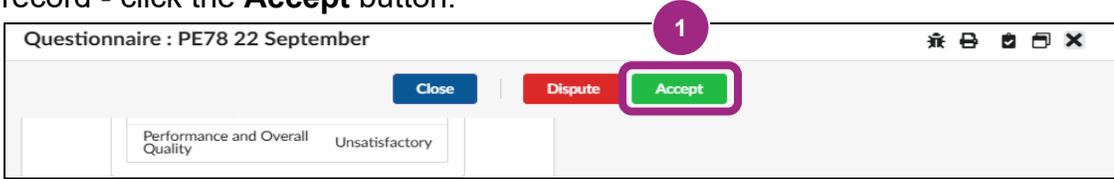
Scoring Context

Close

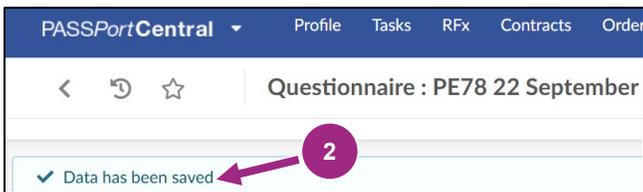
7. Be sure to review all three categories in detail: Timeliness of Performance, Fiscal Administration and Accountability, and Overall Quality of Performance.

## 6. How to Accept the PE

1. After you are done reviewing the PE, and if there are no issues, you must formally accept the PE record - click the **Accept** button.



2. A message confirms that your response has been saved successfully, and the PE will be added to your vendor account. **No further action is required.**



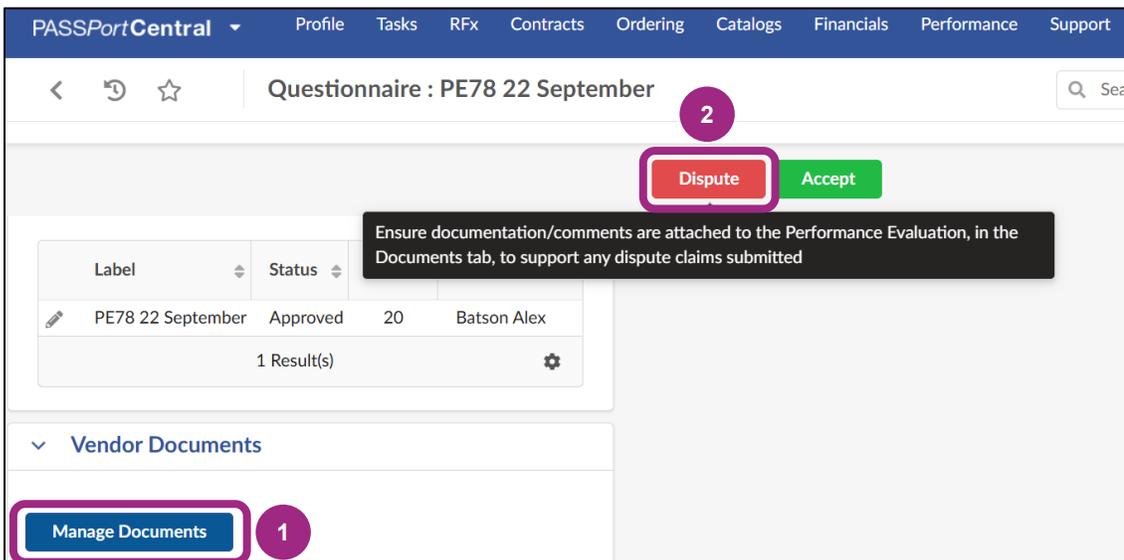
## 7. How to Dispute the PE

After reviewing the PE, if you wish to dispute, follow these steps:

1. Click the **Manage Documents** button and follow the prompts to upload support documentation for the dispute. Refer to the **Upload or Link Documents guide** for instructions.  
As a best practice, include the PE name (label) and your vendor legal name in the file name.

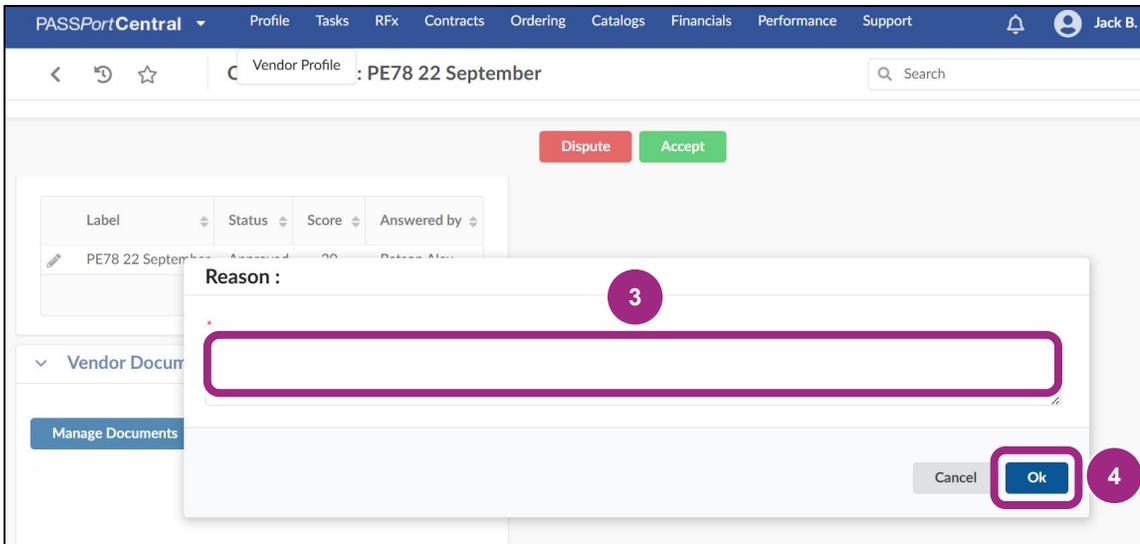
**Important:** Documentation must be attached prior to clicking the **Dispute** button!

2. Click the **Dispute** button.



3. In the **Reason** field, enter a detailed explanation why you are disputing the PE. As a best practice, specify the relevant category and question, and reference any supporting document you uploaded.

4. Click the **Ok** button.



5. A message confirms that your response has been saved successfully.



6. The Agency will review your comments and documentation and **either re-open the PE** and issue a new evaluation **or finalize the PE** and keep the original results.

7. The Vendor Admin(s) at your organization will receive an **email notification** either prompting them to review and accept the updated PE results or informing them that the PE has been finalized.

8. If the PE was re-opened, complete the steps to review and accept (or dispute) the PEs.