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1.0 User Guide
To begin, navigate to the Consultant Selection Portal website, which can be accessed at https://www.hidoefacilities.org/consultantselection/. The homepage should look like this:
1.1 Creating and Verifying User Account

Before any portion of the submittal can occur, a user must create an account and confirm the email address associated with the account so the DOE Facilities Development Branch (FDB) can confirm that the user can receive messages from FDB as the associated email address.

1.1.1 Create Account

- New users must fill out the user registration form on the homepage.
- Account creation is contingent on the user agreeing to the Terms and Conditions of the website, which can be viewed through the link.
- Complete a Google reCAPTCHA test to confirm the user is not a robot.
- Click “Create Account” to submit information and complete account registration.

After successfully submitting the form, users will be shown a Registration Confirmation screen, instructing them to check their email for account verification.

1.1.2 Confirm your Account

To confirm the account, complete the following steps:

- Look for a message in the inbox of the email entered at registration with the subject “Confirm your State of Hawaii DOE FDB Consultant Portal Account”.
Hi Jane Aloha,

Please verify your email to complete your registration at the State of Hawaii - DOE Consultant Portal by clicking on the following link: Verify Email.

This link will expire in 24 hours.

Thank you,

Hawaii Department of Education - Facilities Development Branch

- Click on the “Verify Email” link to verify the email associated with the account.
- Clicking the link from the email will automatically return to the CSP site. Once the Confirm Email button is clicked, the Email Confirmed page with a Sign In button will appear.
- This link is valid for 24 hours from the time it was sent. If the link expires, the user must re-create the account.
1.2 Signing In and Creating the Company

1.2.1 Sign In

To sign in:

- Click on the “Sign In” link on the Email Confirmed screen or the “Vendor Sign In” button at the top of the homepage.

- Enter the username and password on the displayed login screen and click “Login”.

- New users or users not associated with a company will be directed to the create company screen. Users registered with a company or invited users will be directed to the Company General Information - Update screen.

1.2.2 Register Company

If this is the user’s first time logging in after registration or the user is not yet associated with a company, he or she will be prompted to register the company to the system.

- Enter the company name, state, and the EIN.
Once a company is registered, the EIN entered at this step cannot be altered. If the incorrect number was used, the user will need to have the company record deleted to complete the company registration step again.

After all information is completed, click “Register Company”.

The company registration is now complete, and the user will be prompted to log out and log back in for the user roles to take effect.

Click “Logout” to log out. The Office of Facilities and Operations main page will display.
In the Procurement column, locate the Professional Services tile. Click on the image above Portal for Consultant Selections. The user will be returned to the Consultant Selection Portal homepage where they can click “Vendor Sign In” at the top to log back in.

After logging back in, the user will be taken to the Company General Information – Update screen.

1.2.3 Forgot Password
To reset the password:

- Click Forgot Password at the bottom of the Log in page.

- Enter email and security code. Click “Reset Password”.
Instructions to reset the password will be sent to the email address.

Clicking the link provided in the email will direct the user to change their password. The user has 2 hours to complete this request.

Enter and confirm the new password and click “Submit”

The password will be reset and the user may continue to the Sign In page.
1.3 **Company Information**

After a user account is associated with a company, signing in will first direct the user to Company General Information – Update screen.

### Company General Information - Update

Primary Contact to receive email notifications: Jane Aloha (primary@yourcompanyemail.com)

All fields are required unless stated otherwise.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>Grass Hut Roofing Inc.</td>
</tr>
<tr>
<td>Company EIN</td>
<td>00-00000000</td>
</tr>
<tr>
<td>Company Type *</td>
<td>Select a Company Type</td>
</tr>
<tr>
<td>Year Company Established (YYYY)*</td>
<td></td>
</tr>
<tr>
<td>State Company Established *</td>
<td>Select a State</td>
</tr>
<tr>
<td>Address Line 1 *</td>
<td></td>
</tr>
<tr>
<td>Address Line 2</td>
<td></td>
</tr>
<tr>
<td>City *</td>
<td></td>
</tr>
<tr>
<td>State *</td>
<td>Select a State</td>
</tr>
<tr>
<td>Zip Code *</td>
<td></td>
</tr>
<tr>
<td>Phone Number *</td>
<td></td>
</tr>
<tr>
<td>Fax Number (optional)</td>
<td></td>
</tr>
<tr>
<td>Person In Charge *</td>
<td></td>
</tr>
<tr>
<td>Number of Years in Hawaii *</td>
<td></td>
</tr>
<tr>
<td>Number of Personnel with Hawaii Licenses *</td>
<td></td>
</tr>
<tr>
<td>Number of Personnel without Hawaii Licenses *</td>
<td></td>
</tr>
</tbody>
</table>

Company information can also be viewed by hovering over Company Information at the top menu, which will display a menu where additional company information can be edited.
1.3.1 General Information
Users can update general information, such as address and person in charge. While viewing general information, users may edit any field within the form except for Company Name and Company EIN. The EIN is the company’s unique identifier and should never be changed.

To edit:

- Select any field and make the appropriate changes.
- To save, click the “Save” button.
- To cancel edits, click the “Cancel” button.

1.3.2 Insurance & Required Documents
Users can enter Insurance and legal related information related to the company, such as litigation history on the Company Insurance Information – Update screen. Different documents may be required depending on selections.

- Company Types (located in General Information) other than “Individual” require:
  - Certificate of Good standing OR
  - Certificate of Vendor Compliance
- Checking “Company has E&O Insurance” requires:
  - Proof of Insurance document
  - Amount of coverage
  - Amount of deductible
To edit Insurance Information:

- Select any field and make the appropriate changes.
- To save, click the “Save” button.
- To cancel edits, click the “Cancel” button.

To add Required Company Documents (PDF only):

- Select a Document Type from the dropdown.
- Click the “Choose File” button to select the file to upload.
- Enter Reference.
- Click the “Add” button.
- Uploaded documents will be displayed in the listing.
To delete Documents:

- Click Delete next to the X on the far right of the attachment.
- A confirmation modal will be displayed, prompting users to confirm that they wish to delete that discipline. Click “OK” for yes, or “Cancel” for no.

1.3.3 Company Project Information

Users can explain the firm’s project assignment, management structure, workflow, and quality control process. A summary of the firm’s completed and present projects during the last ten years can be entered on this screen.
Company Project - Update

Info Complete: No

All fields are required

Explain firm’s project assignment

Explain firm’s project management structure

Explain firm’s project workflow

Explain firm’s quality control process

Summary of Your Firm’s Completed and Present Projects During the Last Ten Years

As a Prime A/E Consultant

<table>
<thead>
<tr>
<th>Total Number of Completed Projects</th>
<th>Total Estimated Construction Cost of Completed Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Number of Completed Projects</td>
<td>Total Estimated Construction Cost of Completed Projects</td>
</tr>
<tr>
<td>Total Number of Present Projects</td>
<td>Total Estimated Construction Cost of Present Projects</td>
</tr>
<tr>
<td>Total Number of Present Projects</td>
<td>Total Estimated Construction Cost of Present Projects</td>
</tr>
</tbody>
</table>

As an Associate with Other A/E Consultant

<table>
<thead>
<tr>
<th>Total Number of Completed Projects</th>
<th>Total Estimated Construction Cost of Completed Projects (only the portion of work for which your firm was responsible)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Number of Completed Projects</td>
<td>Total Estimated Construction Cost of Completed Projects (only the portion of work for which your firm was responsible)</td>
</tr>
<tr>
<td>Total Number of Present Projects</td>
<td>Total Estimated Construction Cost of Present Projects (only the portion of work for which your firm was responsible)</td>
</tr>
<tr>
<td>Total Number of Present Projects</td>
<td>Total Estimated Construction Cost of Present Projects (only the portion of work for which your firm was responsible)</td>
</tr>
</tbody>
</table>

Class of Work and Project Type Specialization

<table>
<thead>
<tr>
<th>Project Type</th>
<th>No. of Completed Projects</th>
<th>Total Est. Construction Cost</th>
<th>Total Est. Project Size (G.S.F.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected Project Type</td>
<td>No. of Completed Projects</td>
<td>Total Est. Construction Cost</td>
<td>Total Est. Project Size (G.S.F.)</td>
</tr>
</tbody>
</table>

Company Projects

No records yet.
To edit Company Project Information:

- Select any field and make the appropriate changes.
- To save, click the “Save” button.
- To cancel edits, click the “Cancel” button.

At least one class of work and project type specialization is required. To add Project Type Specializations:

- Select a Project Type from the dropdown.
- Click the “Add” button.
- Added Project Types will appear in the listing.

To edit Project Type Specializations:

- Click Edit next to the pencil icon on the far right.
- Select any field and make the appropriate changes.
- To save, click the “Save” button.
- To cancel edits, click the “Cancel” button.

To delete Project Type Specializations:

- Click Delete next to the X on the far right.
- A confirmation modal will be displayed, prompting users to confirm deleting that discipline. Click “OK” for yes, or “Cancel” for no.

1.4 Discipline Information

Click on Discipline at the top menu to view the Discipline Information screen. In the Discipline Information screen, consultants are required to select all the disciplines to which they are applying for and provide any supplemental information related to the
firm’s work in each discipline being applied for.

1.4.1 Adding Disciplines

To Add a Discipline:

- Select a Discipline from the dropdown. Click the “Add” Button in the Disciplines section.
- The new Discipline will display in the listing.
Discipline - Update

Select at least one discipline (required) for current selection range

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Created Date</th>
<th>Created By</th>
<th>Updated Date</th>
<th>Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Management</td>
<td>7/13/2021</td>
<td>Jane Alone</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All Disciplines and Associates

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Associate Name</th>
<th>Associate Created By</th>
<th>Associate Updated Date</th>
<th>Associate Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All Discipline Files

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Filename</th>
<th>Reference Name</th>
<th>Created Date</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The Discipline – Update form is broken up into three parts:
  - Part 1: Select a discipline.
  - Part 2 (optional): Add associated individuals or firms that are usually employed that pertain to the discipline being applied for. For each associated firm or individual, add a new associate.
  - Part 3 (optional): Additional supplemental files. Consultants can upload other PDF with support materials as deemed necessary. File(s) must be in PDF format, and less than 10MB.
- The minimum information required to save a new discipline is the discipline type.

1.4.2 Editing Disciplines

To edit a Discipline:

- Click Edit next to the pencil icon on the right of the Discipline to edit.
- To add, edit, or remove additional associates, click the "Associates" button.
- To add, edit, or remove additional file(s), click the Files button.
- Users cannot change the type of discipline that was selected after it has been saved. If the incorrect discipline type was saved, it must be deleted.

1.4.3 Deleting Disciplines

To delete a Discipline:

- Click Delete next to the X icon to the far right of the discipline name.
A confirmation modal will be displayed, prompting users to confirm that they wish to delete that discipline. Click “OK” for yes, or “Cancel” for no.

1.5 **Branch Information**

Click on Branch at the top menu to add, edit, and view Company Branches.

The “Main Office” Branch will be created automatically and represents the main office of the company. Data from the Company Information section will be reflected here. The Main Branch will require additional information to be filled out by the user to be considered complete. Additional branches can be added, and existing branches can be edited or deleted.
1.5.1 Editing Branches
To edit the Main Office branch:

- Click Update at the far right of the Main Office.
- Click “Save” to save the updates.
- Additional branches can be edited in the same manner once they have been added and saved.

1.5.2 Adding Branches
To add a new branch:

- Complete the data entry for the next branch in the Add Branch section.
- Click “Save” to save the new branch.
- Upon successful save, the new branch will be added to the list of branches.

1.5.3 Deleting Branches
To delete a branch:

- Locate the branch to delete on the list of branches.
- Click Delete located to the far right of the branch name.
- The Main Office branch cannot be deleted, as it is based off the Company Information section.

1.6 Employee Information
Click on Employee in the top menu to view the Company Employees section.
In the Employees section, consultants are to enter all the principal, associate, and technical employees to their Consultant Qualification submittal. Within this section, consultants can add, delete, and edit an employee.

### 1.6.1 Adding Employees

To add an employee:

- Complete the data entry for each employee in the Add Employee section.
- Click “Save” to add the employee.
- Upon successful save, the added employees will appear in the All Employees listing.
● Education, memberships, registrations, and history are required for Principal and Associate type Employees and recommended for others, as they are helpful in qualifying each employee.
  ○ To add education, memberships, and/or registrations, click the corresponding links to the right of each employee.

<table>
<thead>
<tr>
<th>Education</th>
<th>Membership</th>
<th>Registration</th>
</tr>
</thead>
</table>

  ○ The fields for the associated section will display. All fields are required to add each respective education, membership, or registration.
  ○ For employees of type “Principal” and “Associate”, a section for listing Employment History will be available. All fields in this section must be filled out to save each individual employment history record.

<table>
<thead>
<tr>
<th>Education</th>
<th>Membership</th>
<th>Registration</th>
<th>History</th>
</tr>
</thead>
</table>

1.6.2 Editing Employees
To edit an employee:

● Click Update at the right of the employee to edit.
● When completed, click “Save”.
● To edit a previously saved education, membership, registration, or history, click the corresponding links to the right of the employee.

1.6.3 Deleting Employees
To delete an employee:

● Locate the employee to delete on the list of employees.
● If education, membership, registration, or history has been entered for the employee, these will need to be deleted first.
  ○ To delete a previously saved education, membership, registration, or history, click the corresponding links to the right of the employee.
  ○ Click ‘Delete’ at the right of the Edit link.
● Click Delete located to the far right of the employee name.

1.7 Project Information
Click Project in the top menu to view the Project Information section.

In the Project Information section, consultants are to enter up to 10 present or completed projects for which they are the prime consultant, and up to 10 present or completed projects for which they were associated by others. Consultants are to select
projects that reflect the company’s ability to provide quality work for the disciplines/project types being applied for.

1.7.1 Adding Projects
To add a project:

- Complete the data entry for each Project in the Add Projects section.
- Click “Save” to add the project.
- Upon successful save, added projects will appear as a listing under All Projects.

1.7.2 Editing Projects
To edit a project:

- Click Update at the right of the Project to edit.
- When completed, click “Save”.

1.7.3 Deleting Projects
To delete a project:

- Locate the project to delete on the list of projects.
- Click Delete next to the X icon, located to the far right of the project.

1.8 Submitting Qualifications
Consultants can preview their company’s qualifications. To preview qualifications, hover over Submit Qualifications and click “Preview & Submit Qualifications” from the top menu.
1.8.1 Preview Qualifications

The qualifications will be gathered from all sections and validated for completion. If there is missing information, it will be listed at the top.

A summary of the entered qualifications is displayed at the bottom.
Once the five sections (Company Information, Disciplines, Branches, Employees, and Projects) have all been completed, the consultant can submit the company’s qualifications by clicking on “Submit Qualifications”.

**Qualifications - Summary**

The Submit Qualifications screen will display and the user must enter his or her job title. Once this is done, click “Submit Qualifications”. To cancel the submission, click “Back”.

### 1.8.2 Submitted Qualifications

Consultants can view their most recent submitted qualifications along with past submissions, by clicking on “Submitted Qualifications” from the dropdown menu. Only the most recent Qualifications per Selection Period is sent to the DOE. Past submissions are just a historical log (snapshot) of the qualifications at that time.
1.9 Admin

The following actions can be done from the Admin menu.

1.9.1 Invite Users

Click on “Invite Users” to view the Employee Registration Invite screen. Invite users to join the company by entering their first name, last name, and email and click on the “Add” button.

Invited users will be sent an email and must login or register using the link in the email. Existing users associated with a company will be asked if they would like to join the new company or remain with the existing. New users must create an account.

1.9.2 Set Primary Contact

The email that is designated as the Primary Contact will receive notifications.
To set the Primary Contact, click on Edit next to the email to set to and check the Primary Contact box.

To remove Primary Contact designation, click on Edit next to the email that was originally the Primary Contact and uncheck the box.

### Set Primary Contact

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Primary Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Aloha</td>
<td><a href="mailto:primary@yourcompanyemail.com">primary@yourcompanyemail.com</a></td>
<td>Yes</td>
</tr>
<tr>
<td>Anita Assistant</td>
<td><a href="mailto:assistant@yourcompanyemail.com">assistant@yourcompanyemail.com</a></td>
<td>No</td>
</tr>
</tbody>
</table>

1.10 **My Account**

Hover over My Account in the top right corner will display a menu that allows users to view and manage various account settings.

The options available are as follows:

- **My Profile** – Users can edit their name and phone number. User email cannot be changed.
- **Change Password** – Users can change their account password.

  ![Change Password Form](image)

- **Logout** – Signs users out of their accounts. Automatic logout will occur if the user is inactive on the site for 30 minutes. Users will be redirected to the landing page.

  ![Logout Form](image)