Department of Education

Consultant Selection Process

User Guide for Consultant Submittal Process

v 1.8

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.

HAWAII DEPARTMENT OF EDUCATION
Office of Facilities and Operations
BANNER PLACE HOLDER

Registration Confirmed

An activation link has been sent to the email address assigned to your account. Please click the activation link in this email to confirm your account. Once confirmed, you will be able to login to the system. If you haven't received your activation email, please be sure to check your spam/junk folder as it may have been incorrectly flagged as spam by your email hosting provider.

HAWAII DEPARTMENT OF EDUCATION
Office of Facilities and Operations

3633 Waialae Avenue
Honolulu, HI 96816
Phone: 808-784-5000

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.
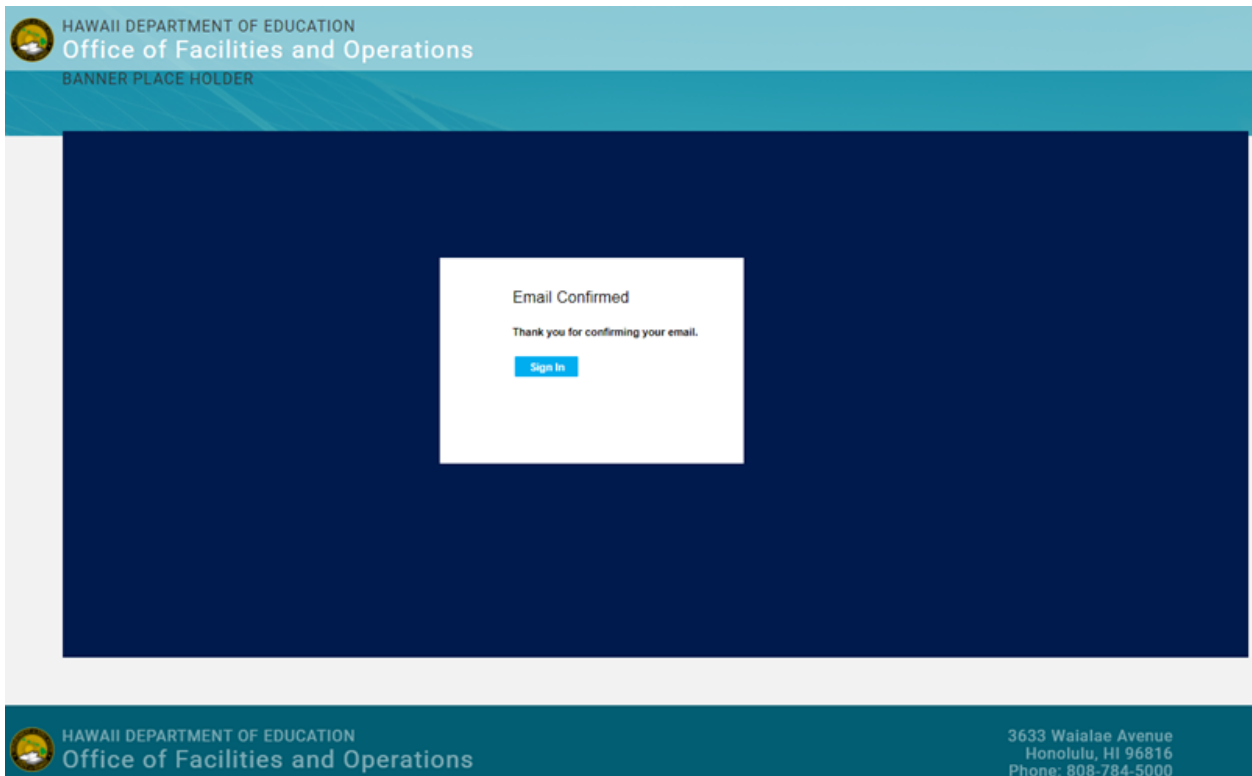
1.2 Signing In and Creating the Company

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.

State of Hawaii - Department of Education

Office of Facilities and Operations

Consultant Qualifications

Register Company

Firm Name *

Firm State * Select a State ▾

EIN *

Register Company

- 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.

Home   My Account ▾

Please log out and log back in for your user roles to take effect.

Logout

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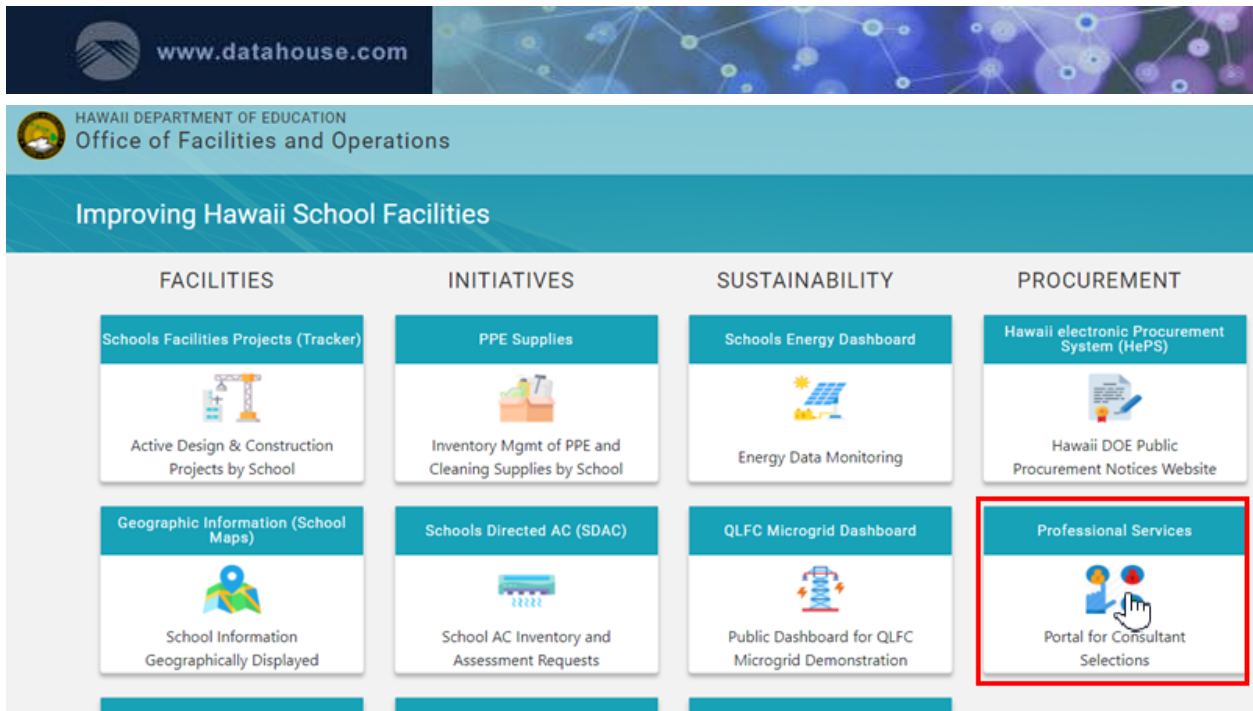
- In the Procurement column, locate the Professional Services tile. Click on the image above Portal for Consultant Selections. The user will be returned to the Consultant Selection Portal homepage where they can click "Vendor Sign In" at the top to log back in.
- After logging back in, the user will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

Reset Password

Email* [jane_aloha@email.com]

Security code *734529*

Enter code* [ ]

[Reset Password]

- Instructions to reset the password will be sent to the email address.

State of Hawaii - Department of Education

Office of Facilities and Operations - Consultant Qualifications

Reset Password

Instructions to reset your password were sent to your email address. You will need to click on the provided link within 2 hours to complete your request.

[Sign In]

Hello Jane Aloha,

This is an automated email from Consultant Qualifications.

We have received your request to reset your password. Reset your password now by clicking on the link below. This link will expire within 2 hours of receiving this email.

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

Reset Password

New password* [ ]

Confirm new password* [ ]

[Submit]

- Enter and confirm the new password and click "Submit"
- The password will be reset and the user may continue to the Sign In page.

Office of Facilities and Operations - Consultant Qualifications

Reset Password

Your password has been reset.

Sign In

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.

Company Name	Grass Hut Roofing Inc.
Company EIN	00-0000000
Company Type *	Select a Company Type ⌄
Year Company Established (YYYY) *	
State Company Established *	Select a State ⌄
Address Line 1 *	
Address Line 2	
City *	
State *	Select a State ⌄
Zip Code *	
Phone Number *	
Fax Number (optional)	
Person In Charge *	
Number of Years in Hawaii *	
Number of Personnel with Hawaii Licenses *	
Number of Personnel without Hawaii Licenses *	

Save   Cancel

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.
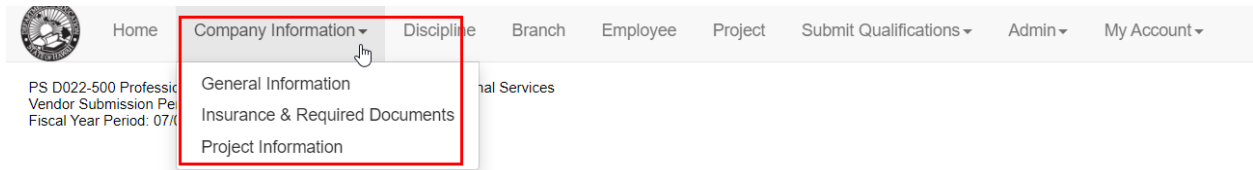
1.3.1 General Information

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

Company Insurance Information - Update

Info Complete: No

All fields are required.

Company is bonded ☐   Company has E&O Insurance ☐

Summarize litigation history for the past 5 years (optional)

```
Summarize litigation history for the past 5 years (optional)
```

Drag the lower right corner to elongate or shorten text area.

Proof of Insurance

Amount of Coverage   [Amount of Coverage]   **Amount of Deductible**   [Amount of Deductibl]

[Save]   [Cancel]

Required Company Documents (PDF only)

1. Transmittal Letter *The Transmittal Letter needs to be updated annually.
2. Certificate of Vendor Compliance *The Certificate needs to be updated annually.

Current Selection Year. Please make sure your company name is in your filename.

Attachments have not been uploaded.

File Type	File Name	Created By	Uploaded Date	Updated By	Updated Date	Reference	
[Select a Document Type ▼]	[Choose File] No file chosen					[Defaults to filename or enter a r]	[Add]

Uploaded Company Documents

Attachments have not been uploaded.

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.
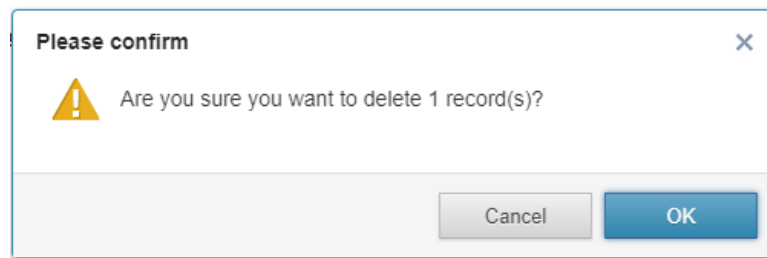
1.3.3 Company Project Information

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

Total Number of Completed Projects*	**Total Estimated Construction Cost of Completed Projects***
Total Number of Completed Projects	Total Estimated Construction Cost of Completed Projects
Total Number of Present Projects*	**Total Estimated Construction Cost of Present Projects***
Total Number of Present Projects	Total Estimated Construction Cost of Present Projects

As an Associate with Other A/E Consultant

Total Number of Completed Projects*	**Total Estimated Construction Cost of Completed Projects (only the portion of work for which your firm was responsible)***
Total Number of Completed Projects	Total Estimated Construction Cost of Completed Projects (only the portion of work for which your firm was responsible)
Total Number of Present Projects*	**Total Estimated Construction Cost of Present Projects (only the portion of work for which your firm was responsible)***
Total Number of Present Projects	Total Estimated Construction Cost of Present Projects (only the portion of work for which your firm was responsible)

[Save]   [Cancel]

Class of Work and Project Type Specialization

Current Year

No records yet.

Project Type	No. of Completed Projects	Total Est. Construction Cost	Total Est. Project Size (G.S.F.)	
Select a Project Type	No. of Completed Projects	Total Est. Construction Cost	Total Est. Project Size (G.S.F.)	Add

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.

Class of Work and Project Type Specialization
Current Year

Project Type	No. of Completed Projects	Total Est. Construction Cost	Total Est. Project Size (G.S.F.)	
Select a Project Type	No. of Completed Projects	Total Est. Construction Cost	Total Est. Project Size (G.S.F.)	Add
Construction Management				✏ Edit ✕ Delete

Company Projects

Year ▲	Project Type	No. of Completed Projects	Total Est. Construction Cost	Total Est. Project Size (G.S.F.)	Created By	Updated By
2021	Construction Management				Jane Aloha	

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

Info Complete: No

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

Discipline	Created Date	Created By	Updated Date	Updated By				
Select a Discipline							Add	
Construction Management	7/13/2021	Jane Aloha			Associates	Files	Edit	Delete

All Disciplines and Associates

Discipline ▲	Associate Name	Associate Created By	Associate Updated Date	Associate Updated By
Construction Management				

Show per page 25

All Discipline Files

Selection Period ▼	Discipline	Filename	Reference Name	Created Date	Created By
	Construction Management				

Show per page 25

- The Discipline – Update form is broken up into three parts:
  - o Part 1: Select a discipline.
  - o 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.
  - o 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.

	Home	Company Information ▾	Discipline	Branch	Employee	Project	Submit Qualifications ▾	Admin ▾	My Account ▾

PS D022-500 Professional Services - Educationally Related Professional Services
Vendor Submission Period: 04/01/2021 - 03/31/2022
Fiscal Year Period: 07/01/2021 - 06/30/2022

Company Branches

Info Complete: No

All Branches

Name	Address Line 1	Address Line 2	City	State	Zip Code	Phone Number	Fax Number	Created Date	Created By	Updated Date	Updated By		
Leeward Office	100 Waipahu Street		Waipahu	Hawaii	96797	808-555-4321		7/13/2021	Jane Aloha			Update	Delete
Main Office	808 Main Street		Honolulu	Hawaii	96814	808-555-1234		7/13/2021	Jane Aloha			Update	

Add Branch - All fields are required unless stated otherwise.

Branch Name*	Address Line 1*		Address Line 2	City*
Branch Name	Address Line 1		Address Line 2	City

State*	Zip Code*		Phone Number*	Fax Number (optional)
Select a State	Zip Code		Phone Number	Fax Number (optional)

Number of Engineers

Architects*	Mechanical*	Electrical*	Civil*	Other*
Architects	Mechanical	Electrical	Civil	Other

Number of Other Professionals

Draftsmen*	Spec. Writer*	Estimators*	Inspectors*	Surveyors*	Balance*
Draftsmen	Specification Writers	Estimators	Inspectors	Surveyors	Balance

Save

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.

Company Branches

Info Complete: Yes

All Branches

Name	Address Line 1	Address Line 2	City	State	Zip Code	Phone Number	Fax Number	Created Date	Created By	Updated Date	Updated By		
Leeward Office	100 Waipahu Street		Waipahu	Hawaii	96797	808-555-4321		7/13/2021	Jane Aloha			Update	Delete
Main Office	808 Main Street		Honolulu	Hawaii	96814	808-555-1234		7/13/2021	Jane Aloha			Update	

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.

Home   Company Information ▾   Discipline   Branch   **Employee**   Project   Submit Qualifications ▾   Admin ▾   My Account ▾

PS D022-500 Professional Services - Educationally Related Professional Services
Vendor Submission Period: 04/01/2021 - 03/31/2022
Fiscal Year Period: 07/01/2021 - 06/30/2022

Company Employees

Info Complete: Yes

All Employees

No records found.

Add Employee - All fields are required unless stated otherwise.

Employee Branch*	First Name*	Last Name*	Resident of*
Select a Company Branch ▼	First Name	Last Name	Select a Resident State ▼
Job Title*	**Employee Level***	**Employee Type***	**Status***
Job Title	Select an Employee Level ▼	Select an Employee Type ▼	Select a Status ▼

Years of Experience*	Years of Experience with this firm*
Years of Experience	Years of Experience with this firm

Name of Last Firm	Years of Experience with last firm	Years of Experience with other firms
Name of Last Firm	Years of Experience with last firm	Years of Experience with other firms

Years of Experience as Principal in this firm	Years of Experience as Principal in other firms	Years of Experience as other than Principal
Years of Experience as Principal in this firm	Years of Experience as Principal in other firms	Years of Experience as other than Principal

Position	Responsibilities
Position	Responsibilities

Save

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.

Company Employees

Info Complete: Yes

All Employees

Employee Branch ▲	First Name	Last Name	Status	Resident of	Level	Type	Job Title	Years of Experience	Years of Experience with this firm	Name of Last Firm	Years of Experience with last firm	Years of Experience with other firms		
⊟ Leeward Office														
	Max	Mahalo	Full Time	Hawaii	Other	Other	Project Coordinator	12	3	Ruff Builders	2	5	Update Education Membership Registration	Delete

- 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.

Education   Membership   Registration

    - 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.

Education   Membership   Registration   History

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

www.datahouse.com

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

| Home | Company Information▼ | Discipline | Branch | Employee | Project | Submit Qualifications▼ | Admin▼ | My Account▼ |

PS D022-500 Professional Services - Educationally Related Professional Services
Vendor Submission Period: 04/01/2021 - 03/31/2022
Fiscal Year Period: 07/01/2021 - 06/30/2022

Projects

Info Complete: No

All Projects

No records found.

Add Projects - List projects that reflect your ability to provide quality work for your requested projects.

All fields are required unless stated otherwise.

Project Information

Year*	Project Name*	Role*	Address Line 1*
Year	Project Name	Select a Project Role ▼	Address Line 1

Address Line 2 (optional)	City*	State*	Zip Code*
Address Line 2 (optional)	City	Select a State ▼	Zip Code

Project Description*

Project Description

Design Duration (Months)*	% Design Completed*	% Construction Completed*	Total Estimated Construction Cost
Design Duration (Months)	% Design Completed	% Construction Completed	Total Estimated Construction Cost

Project Type	Time Frame	Your Firm's Work Estimated Cost	Prime Firm Project Associated With
Select a Project Type ▼	Select a Time Frame ▼	Your Firm's Work Estimated Cost	Prime Firm Project Associated With

Project Type	Time Frame	Name of Lead Designer	Email of Lead Designer
Select a Project Type ▼	Select a Time Frame ▼	Name of Lead Designer	Email of Lead Designer

Project Owner's Information

Name*	Address Line 1*	Address Line 2 (optional)	City*
Name	Address Line 1	Address Line 2 (optional)	City

State*	Zip Code*	Phone Number*	Fax Number (optional)
Select a State ▼	Zip Code	Phone Number	Fax Number (optional)

Save

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.

Projects

Info Complete: Yes

All Projects

Year ▼	Role	Type	Project Name	Description	Address Line 1	City	State	Zip Code	Created Date	Created By	Updated Date	Updated By			
2010	Associate	Construction Management	Reroofing Joe's Shack	Reroof Joe's Shack due to wind damage.	123 Beach Way	Ewa Beach	Hawaii	96706	7/14/2021	Jane Aloha			Update	View Details	✕ Delete

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.

Qualifications - Summary

Info Type ▲	Message
⊟* Summary - Some information is incomplete. Please see below.	
⊟ Branches > Branch	
	Missing main office # of architects.
	Missing main office # of mechanical engineers.

A summary of the entered qualifications is displayed at the bottom.

Qualifications - Preview
Company General Info

Company Name	Company EIN	Company Type	Year Company Established	State Company Established	Address Line 1	Address Line 2	City	State	Zip Code	Phone Number	Fax Number	Person In Charge	Number of Years in Hawaii	Number of Personnel with Hawaii Licenses	Number of Personnel without Hawaii Licenses	Company is bonded	Company has E&O Insurance	Insurance Amount of Coverage	Insurance Amount of Deductible
Grass Hut Roofing Inc.	99-7654321	Corporation	1998		808 Ekomomai Way	Suite 123 2nd Flr	Honolulu	Hawaii	96814-1234	808-555-1234	808-555-4444	Jane Aloha	22	5	4	1	1	$100,000.00	$5,100.00

Litigation History	Project Assignment	Project Management Structure	Project Workflow	Quality Control Process
testing 1234 for the new submission	fix roofs and ceilings testing additional submit	the usual and more	nothing special but something special	double checking and additionally more checking

Company Documents (required) and Insurance Documents

Selection Year	File Type ▲	Reference Name	File Name	Uploaded Date	Uploaded By
2022 - 2023	Certificate of Good Standing	TEST Certificate Compliance - FY23.pdf	TEST Certificate Compliance - FY23_1.pdf	3/28/2022	Jane Aloha
2022 - 2023	Transmittal Letter	TEST Transmittal Letter - FY23.pdf	TEST Transmittal Letter - FY23.pdf	3/29/2022	Jane Aloha

Class of Work and Project Type Specialization

Project Year ▲	Project Type	Total Completed Projects	Total Est. Construction Cost	Total Est. Project Size (G.S.F.)	Created By	Updated By
2022	Architectural Planning and Design	100	$1,230,000,000.00	100	Jane Aloha	

Discipline Associate Information

Discipline ▲	Associate Name	Associate Created By	Associate Updated Date	Associate Updated By
Architectural Planning & Design	Sam Da Man Plan Co.	Jane Aloha	3/29/2022	Jane Aloha
Community Planning	John's Roof Work Inc.	Jane Aloha	3/25/2022	Jane Aloha
Energy Performance Engineering				
Landscape Architecture	AAA Landscaping	Jane Aloha		

Show per page 25 ▼

Discipline File Information (optional)

Discipline	Reference Name	File Name	Created Date	Created By	Updated Date	Updated By
Architectural Planning & Design	attach-test-PDF.pdf	attach-test-PDF_1.pdf	3/28/2022	Jane Aloha		
Community Planning	TEST Discipline File.pdf	TEST Discipline File.pdf	3/29/2022	Jane Aloha		
Landscape Architecture	attach-test-PDF.pdf	attach-test-PDF_2.pdf	3/28/2022	Jane Aloha		

Branch Information

Branch Name	Address Line 1	Address Line 2	City	State	Zip Code	Phone Number	Fax Number	# of Architects	# of Mechanical Engineers	# of Electrical Engineers	# of Civil Engineers	# of Other Engineers	# of Draftsmen	# of Specification Writers	# of Estimators	# of Inspectors	# of Surveyors	Balance
Leeward Office	967 Dirt Road #800		Waipahu	Hawaii	96797	808-555-1111		2	2	2	2	1	2	2	1	1	1	1
Main Office	808 Ekomomai Way	Suite 123 2nd Flr	Honolulu	Hawaii	96814-1234	808-555-1234	808-555-4444	2	1	1	1	0	1	1	0	0	0	0

Employee Information

Employee Branch ▲	Employee Name	Employee Status	Resident of	Level	Type	Job Title	Years of Experience	Years of Experience with This Firm	Employee Position	Responsibilities	Name of Last Firm	Years of Experience with Last Firm	Years of Experience with Firm as Principal	Years of Experience with Other Firm	Years of Experience as Principal with Other Firm	Years of Experience As Other Than Principal
☐ Leeward Office																

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

Info Type ▲	Message
⊟ * Summary - All information is complete.	
Qualifications are ready to be submitted.	Submit Qualifications

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.

Submitted Qualifications

Selection Period	Year	Title	Submitted ▼	
04/01/2022 - 03/31/2023	2022	Your Title	4/4/2022	View Qualifications
04/01/2022 - 03/31/2023	2022	Your Title	4/3/2022	View Qualifications
04/01/2022 - 03/31/2023	2022	Your Title	4/1/2022	View Qualifications

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.

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

Set Primary Contact

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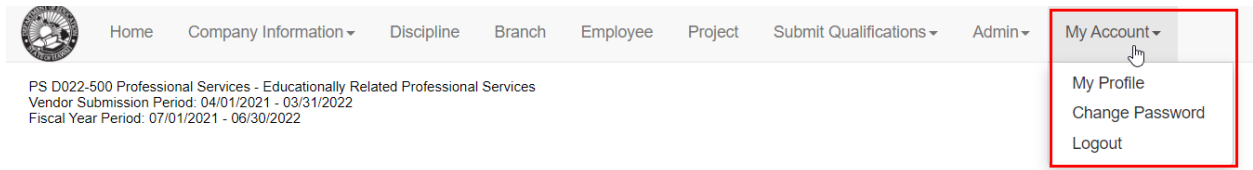
💾 Download Data

Name	Email	Primary Contact ▼	
Jane Aloha	primary@yourcompanyemail.com	Yes	✏ Edit
Anita Assistant	assistant@yourcompanyemail.com	No	✏ Edit

Show per page   25 ⌄
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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.

Home   Company Information ▾   Discipline   Branch   Employee   Project   Submit Qualifications ▾   Admin ▾   My Account ▾

My Profile
Change Password
Logout

PS D022-500 Professional Services - Educationally Related Professional Services
Vendor Submission Period: 04/01/2021 - 03/31/2022
Fiscal Year Period: 07/01/2021 - 06/30/2022

The options available are as follows:

- **My Profile** – Users can edit their name and phone number. User email cannot be changed.

My Profile

Email (Username)	jane_aloha@email.com
First Name	Jane
Last Name	Aloha
Phone Number	808-555-9999
	Company Admin

Back   Save

- **Change Password** – Users can change their account password.

Change Password

Email	jane_aloha@email.com
Current Password*	
Password*	
Confirm Password*	
Security code	589283
Enter code*	

Back   Save

- **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.