



Board of Water Supply Professional Service Consultant Portal User Guide

Welcome to the Board of Water Supply Professional Service Consultant Portal (Portal). Effective June 1, 2021, all firms / individuals interested in providing professional services to the Board of Water Supply (BWS) must use the Portal to submit its qualifications to the BWS. Qualifications submitted via email, mail, or any other method shall not be accepted.

Notices and awards for professional services will continue to be posted on the BWS Procurement website at <https://www.boardofwatersupply.com/procurement>



Board of Water Supply Professional Service Consultant Portal User Guide

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Create Account

Sign In

CREATING AN ACCOUNT

1. To use the Portal, each firm must create a company account in the Portal.
2. Each company will have one (1) account and each account may have multiple users.
3. All users to the company account may input and edit the company's information however, only users designated as "Admin Users" may complete the final step needed to submit qualifications to the Board of Water Supply. (See the User Profile Settings & Management Guide for additional information managing user logins.)
4. To create a new account, go to the Portal at:

<https://pscportal.boardofwatersupply.com>

- a. Complete all fields.
- b. Accept the Terms of Use
- c. Click "Create Account"

First Name *
John

Last Name *
Doe


Phone Number *
8087480000

Email *
john.doe@email.com

Password *

Confirm Password *

By creating an account, I agree to the [Terms of Use](#)

I'm not a robot 

Create Account

Confirm Registration

An activation link has been sent to the email address associated with 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.

Return Home

5. The "Confirm Registration" window will appear. Please click "Return Home" and check the email account associated with your account for the activation email.

6. An activation email will be sent to the email associated with the login. * If you do not see the email, please check your spam/junk folders.

Aloha John Doe,

Please confirm your user login account registration for the Board of Water Supply Professional Service Consultant Portal by clicking the link below. This link will remain valid for 24 hours.

Confirm Account

Thank you,

Board of Water Supply
Procurement Office
(808) 748-5071
Professionalservices@hbws.org

Create Account

Sign In

Email *

Password *

Forgot Password?

Sign In



Aloha John Doe

Please use the six-digit verification code below to sign into your Board of Water Supply Professional Service Consultant Portal account. The code will remain valid for 24 hours.

788385

Thank you,

Board of Water Supply
Procurement Office
(808) 748-5071
Professionalservices@hbws.org

SIGN IN AND 2-STEP VERIFICATION

To protect the security of your account and company information, there is a 2-step verification to sign in.

1. Every time a user signs into the Portal, they will be emailed a 6-digit verification code.
2. This email may take up to 5 minutes to be received. ****If you do not see the email in your inbox, please check your junk/spam folder.**
3. Enter in the 6-digit code and click "Verify."

2-Step Verification

An email with the verification code has been sent.
Enter the 6 digit verification number found in the verification email.

7 8 8 3 8 5

Verify

Register Company

Company Name *
Pukashell Designs, LLC

EIN/SSN *

Confirm EIN/SSN *

Register



COMPANY REGISTRATION

The first company user to create an account will be prompted to complete the company's registration.

To complete the registration, you will need the company's federal employee identification number (EIN) or SSN (as applicable) associated with the company account.

1. Enter EIN/SSN and company/firm name.
2. Click Register



PROJECT CATEGORIES THAT **DO NOT** USE THE SFR330 FORMAT

- Companies that are submitting qualifications for project categories that do require the SFR330 information, please skip this section and go to page 10 of this Guide.

PROJECT CATEGORIES THAT DO NOT REQUIRE THE SFR330

Law-Firms R-US, LLC

Qualification Editor

Part I - Specific Qualifications

Point of Contact

Proposed Project
Category Team

Key Personnel

Example Projects

Part II - General Qualifications

Submission Dashboard

- Project categories that **do not use the SFR330 format** to submit qualifications **do not** need to complete the Qualification Editor.
- Please go directly to the “Submission Dashboard” and select the project categories that you wish to submit qualifications for.

Click “Submission Dashboard”
in the navigation panel.

SELECTING PROJECT CATEGORIES

Using the Submission Dashboard, a company may select any number of **Project Categories** it wishes to submit qualifications for, complete all the fields for the Category using the information that inputted under the Qualification Editor, attach all required supporting documents, and submit the qualifications.

Submission Dashboard

ADD ALL PROJECT CATEGORIES YOUR COMPANY WISHES TO SUBMIT QUALIFICATIONS FOR.

Add/Remove Project

#1 - Click
"Add/Remove" "Project
to start a submission.

Select Project Category

Please select a project category or categories from the list provided.

#2 - Select the appropriate Division and Project Category from the dropdown menus

Division *
Executive Support Office

Project Category *

Add Project

#3 - Click "Add Project."

As Project Categories are added they will appear in the list.

Division	Project Category	Submitted Date	
Executive Support Office	22-01ESO: Legal Counsel	N/A	
Executive Support Office	22-03ESO: Environmental Litigation & Toxic Tort Legal Services	N/A	

Click the trash icon to remove a category

#4 - Once all desired categories have been added and appear in the list, click Continue.

Continue

From the Submission Dashboard page, you may:

- Edit / complete a Project Category submission that has not been submitted.
- See the submission date for Project Categories that have been submitted.



Law-Firms R-US, LLC

Submission Dashboard

Qualification Editor

Add/Remove Project

Submission Dashboard

Division	Project Category	Submitted Date	
Executive Support Office	22-01ESO: Legal Counsel	N/A	Edit
Executive Support Office	22-03ESO: Environmental Litigation & Toxic Tort Legal Services	5/31/2021 9:50	Edit

- Please save a copy of the document/ information you upload and submit through the Portal. **No download/save as a PDF function is available for submissions that do not use the SFR330 format.**

Letter of Interest

- Please provide the information indicated in the Notice to Providers of Professional Services for the Project Category that the company is submitting qualifications for.



Project Category 22-01ES: Legal Counsel - Provide professional legal services to the BWS. Services may be required in, but shall not be limited to, the following areas or specialties: Administrative Law, Bankruptcy, Business (domestic and international), Civil Litigation, Civil Rights including ADA, Collections, Constitutional Law, Construction Law, Criminal Defense, Eminent Domain, Employment Law including discrimination, Environmental Law, Governmental Contracting, Labor Law, Land Use including planning and zoning, Procurement, Public and Charitable Trust Law, Public Financing, Public Utility Commission actions, Real Estate, Tax, and Torts including malpractice, defamation and other international torts.¶

Law firms or attorneys licensed to practice law in the State of Hawaii interested in being retained to provide legal services to the BWS in these areas should submit a letter of interest together with a resume which includes information about the following:¶

- (1) [The name of the firm or person, the principal place of business, location of all offices, and contact information;¶]
- (2) The area(s) of interest for consideration from the areas and specialties listed.

Note:

Save and Exit

- All Documents must be combined into a **single PDF** with a maximum size of 15MB.
- Please note that while the inclusion of pictures is not prohibited, they are not necessary, add to the size of the PDF document and are **highly discouraged**
- Documents uploaded for this submission **will not** be available for download once submitted. **Please retain the original for your records.**

 22-01ES Legal Services Letter of Interest.pdf 

To remove uploaded documents, click the "X".

After uploading the Letter of Interest, click "Next Step".

Upload

< Back

Next Step >

- For final submission steps please see pages 37- 39 of this Guide.



**THE QUALIFICATION EDITOR
FOR
PROJECT CATEGORIES THAT
REQUIRE THE SFR330
INFORMATION**

Pukashell Designs, LLC

Qualification Editor

Part I - Specific Qualifications

Point of Contact

Proposed Project
Category Team

Key Personnel

Example Projects

Part II - General Qualifications

Submission Dashboard

Qualification Editor

Part I - Specific Qualifications

Point of Contact = SFR330 PART I (B)

Proposed Project
Category Team = SFR330 PART I (C)

Key Personnel = SFR330 PART I (E)

Example Projects = SFR330 PART I (F)

Part II - General Qualifications

The Qualification Editor is divided into two parts: Part I - Specific Qualifications and Part II - General Qualifications. Each part is directly related to the respective sections of the SFR330 form.

PART I - SPECIFIC QUALIFICATIONS			
A. CONTRACT INFORMATION			
1. PUBLIC NOTICE DATE	2. PROJECT CATEGORY		
B. POINT OF CONTACT			
3. NAME AND TITLE			
4. NAME OF FIRM			
5. TELEPHONE NUMBER	6. FAX NUMBER	7. E-MAIL ADDRESS	
C. PROPOSED TEAM			
(THIS SECTION MUST BE COMPLETED FOR ALL PROJECT CATEGORIES REQUIRED TO COMPLETE THIS FORM)			
PROFESSIONAL SERVICE PROVIDER QUALIFICATIONS			1. PROJECT CATEGORY OF INTEREST
PART II - GENERAL QUALIFICATIONS			
<i>(If a firm has branch offices, complete for each specific branch office seeking work.)</i>			
2a. FIRM (OR BRANCH OFFICE) NAME		3. YEAR ESTABLISHED	4. DUNS NUMBER
2b. STREET		5. OWNERSHIP	
		a. TYPE	
2c. CITY	2d. STATE	2e. ZIP CODE	b. SMALL BUSINESS STATUS
6a. POINT OF CONTACT NAME AND TITLE			7. NAME OF FIRM <i>(If block 2a is a branch office)</i>
6b. TELEPHONE NUMBER	6c. E-MAIL ADDRESS		
8a. FORMER FIRM NAME(S) <i>(If any)</i>			8b. YR. ESTABLISHED

The Qualification Editor allows companies to build their company profile of Point of Contacts, Proposed Teams for the different Project Categories, Key Personnel, and Example Projects. **We highly recommend that consultants take time to fill in information in the Qualification Editor before starting the submission process.** This is particularly important if you plan to submit for multiple project categories, as all information entered in the Qualification Editor will be available for you to quickly add to each submission without having to type/copy in the information each time.

If you have used the SFR330 Form Template to prepare your company's information you may copy and paste the information from the Template into the information fields in the Portal.

Qualification Editor

PART I - POINT OF CONTACT

Part 1 - Specific Qualifications

Point of Contact

Add Point of Contact

Name Title

In this section you will be entering the information from Part I, Section B of the SFR330 Form.

Add the point of contact(s) for the company. If the company has different points of contact for the various project categories that the company plans to submit qualifications for, a separate point of contact should be created for each person.

1. Click "Add Point of Contact"
2. Complete the information fields (name, title, firm name, phone #, email).
3. Click "Save".

Qualification Editor

Part 1 - Specific Qualifications

Point of Contact

Last Name *
Puka

Title *
Engineer VII

Telephone Number *
8087485000

First Name
John

Name
Puka,

Email Address
puka.

Save [Cancel](#)

Point of Contact

Add Point of Contact

Name	Title	Sort by:
Puka, John	Engineer VII	First Name Last Name Title
Shell, Jane	President	
Aloha, Kimo	Office Manager	

The company's list of Points of Contact may be sorted using the dropdown menu.

To edit or delete a point of contact, click the appropriate icon.

Part 1 - Specific Qualifications

Proposed Project Category Team

Add Proposed Team



Part 1 - Specific Qualifications

Proposed Project Category Team

Title of Proposed Team Set
Civil Engineering

What is the role status for the proposed team?

Prime JV Partner Subcontractor

Firm Name
Pukashell Designs, LLC

Role in This Contract
Prime Consultant

Address
630 S. Beretania Street, Honolulu, Hawaii 96743

Check if branch office

What is the role status for the proposed team?

Prime JV Partner Subcontractor

Firm Name
Consultants R-US

Role in This Contract
Project Engineer

Address
100 S. King Street, Honolulu, Hawaii 96815

Check if branch office

Add Another Team

Organizational Chart

An Organizational Chart is required for the proposed team for submission.

Please upload your proposed team's organizational chart.
(Must be: PDF and no larger than 15MB)

Upload Chart

Civil Engineering Org. Chart.PDF X

Save

Cancel

You may remove any Team Member.

Remove Team



To remove an uploaded PDF document, click the "X".



PART I - PROPOSED PROJECT CATEGORY TEAM

In this section you will be entering information from Part I, Section C of the SFR330 Form.

1. Click "Add Proposed Team" and complete all required fields.
2. Check the box if the Team Member has branch offices, indicate each individual branch office that will have a key role on the Team.
3. To add additional Team Members, click "Add Another Team Member."
4. Upload the Proposed Project Category Team's Organization Chart.
5. Click "Save".

MANAGING /EDITING PROPOSED PROJECT CATEGORY TEAMS





As you create and add Teams, they will appear in the company's list of Proposed Project Category Teams.

Qualification Editor

Part 1 - Specific Qualifications

Proposed Project Category Team

Add Proposed Team

Proposed Team Title	Number of Team Members	Organizational Chart	Sort by: Proposed Team Title ▾
Architectural Services	3	Yes	Proposed Team Title Number of Team Members
Civil Engineering	4	Yes	 
Mechanical Engineer	2	Yes	 

Use the dropdown menu to sort Teams by Title or Number of Team Members.







Team information may be edited or deleted by clicking the applicable icon.

PART I - RESUMES & RELEVANT PROJECTS OF KEY PERSONNEL FOR THE COMPANY

- In this section you will be entering the information contained in Part I, Section E of the SFR330 Form.
- Complete this section for each key person who will participate in a Project Category that the company intends to submit qualifications for.
- For each key person, please provide information on up to five (5) projects in which the person had a significant role that demonstrates the person's capability relevant to her/his proposed role in the applicable project category.
- Click “Add Key Personnel” to begin creating the person’s resume.

Resumes of Key Personnel Proposed for Project Category

[Add Key Personnel](#)

Name	Title	Sort by:	
DOE, JOHN	PRINCIPAL -IN-CHARGE	First Name Last Name Title	 
DOE, JANE	PROJECT ENGINEER		 
ALOHA, KIMO	MECHANICAL ENGINEER		 

The list of Key Personnel for the company may be sorted by using the dropdown menu.

To edit or delete the information for key person, click the applicable pencil or trash icon.

Resumes of Key Personnel Proposed for Project Category

Last Name DOE	First Name JOHN
Title Service Provided PRINCIPAL -IN-CHARGE	
Total Years of Experience 20	Years Experience with Current Firm 15
Firm Name PUKASHELL DESIGNS, LLC	Firm Location (City and State) HONOLULU, HAWAII

Education (Degree and Specialization)

Education. Provide information on the highest relevant academic degree(s) received. Indicate the area(s) of specialization for each degree.

Current Professional Registration (State and Discipline)

Provide information on current relevant professional registration(s) in a State or possession of the United States, Puerto Rico, or the District of Columbia

Other Professional Qualifications (Publications, Organizations, Training, Awards, etc.)

Provide information on any other professional qualifications relating to this contract, such as education, professional registration, publications, organizational memberships, certifications, training, awards, and foreign language capabilities

Relevant Projects

1. Relevant Projects

Title of Project Shell Collection of the 1990's	Location (City and State) Honolulu, Hawaii
Year Completed Professional Services 2015	Year Completed Construction (If Applicable)

Use dropdown menus to select applicable year.

Brief description (Brief scope, size, cost, etc.) and specific role

Provide information on up to five (5) projects in which the person had a significant role that demonstrates the person's capability relevant to her/his proposed role in this contract.

Use the check box below to indicate if the project was performed with any office of the current firm.

Add Relevant Project

Click to Add additional relevant projects. Enter a maximum of five (5) projects per key personnel.

Save

Cancel

PART I - EXAMPLE PROJECTS

- In this section you will be entering the information contained in Part I, Section F of the SFR330 Form.
- In the Qualification Editor companies may enter as many Example Projects as it would like to that best illustrate the Proposed Project Category Team's qualifications and where multiple team members worked together, if possible, that demonstrate the Team's capability to perform work required for the applicable Project Category. ** After the Qualification Editor is filed in, when completing a submission companies may select a maximum of ten (10) Example Projects per project category being submitted. (see page 31 of this Guide.)
- Click "Add Example Project" to begin.
- Please use the "SFR330 Example Template" Word Document to create the brief description of the Example Project and relevance to the respective Project Category. Save the Word document, convert it to a PDF document, and upload the PDF document to the Portal.

Example Projects Which Best Illustrate Firm's Qualifications For Project Category

Add Example Project

The list of all Example Projects for the company may be sorted by Title or Location using the dropdown menu.

Project Title	Location	Sort by:
Roundtop Wells VI	Honolulu, Hawaii	Title Location
Dales Reservoir Repairs VIII	Honolulu, Hawaii	

To edit or delete the information for an Example Project, click the applicable pencil or trash icon.

Qualification Editor

Part 1 - Specific Qualifications

Example Projects Which Best Illustrate Firm's Qualifications For Project Category

Title Roundtop Wells VI	Location (City and State) Honolulu, Hawaii	
Year Completed Professional Services 2020	Year Completed Construction (If Applicable)	
Project Owner Board of Water Supply	Point of Contact Name Carter Lovebird	Telephone Number 8087481234

Use dropdown menus to select applicable year.

Firms Involved With This Project

Firm 1.

Firm Name Pukashell Design, LLC	Firm Location (City and State) Honolulu, Hawaii	Role Prime A-E Civil Engineering
------------------------------------	--	-------------------------------------

Firm 2.

Firm Name Carter's Creations	Firm Location (City and State) Honolulu, Hawaii	Role Structural Engineer
---------------------------------	--	-----------------------------

You may remove any Firm.

[Remove Firm](#)

Firm 3.

Firm Name Drews Architects	Firm Location (City and State) Honolulu, Hawaii	Role Architect
-------------------------------	--	-------------------

[Remove Firm](#)

[Add Involved Firm](#)

Click to add Firms.

Brief Description of Project and Relevance To This Contract

Please download and upload a brief description of project and relevance to this contract (Include scope, size, and cost)

[Project Example Template Word Doc](#)

(Only PDF and no larger than 15MB)

Roundtop Wells VI Civil - Example Project 1.pdf

[Upload PDF](#)

X

[Save](#)

[Cancel](#)

Please use the "SFR330 Example Template" to create the brief description of the Project and relevance to the respective Project Category. Save the Word document, convert it to a PDF document and upload the PDF document to the Portal. The Template is an attachment to the Annual Ad and may also be downloaded from the Portal. Please note that while inclusion of pictures is not prohibited, they are not necessary, add to the size of the PDF document and are **highly discouraged**.

To remove a PDF click the "X".

Click "Save".

PART II - GENERAL QUALIFICATIONS

- Companies with branch offices must submit a separate Part II for each branch office that has a key role on the team.
- The information fields in this section follow the SFR330 Form Part II and require:

- ⊗ Firm Information
- ⊗ Point of Contact
- ⊗ Employees By Discipline
- ⊗ Profile of Firm's Experience
- ⊗ Annual Average Professional Services Revenues

Part II - General Qualifications

Add/Remove or Edit a branch/office that will seek work

Add Branch or Office

Click to Add a Branch or Office

The list of Firms or Branch Offices may be sorted by Name or location using the dropdown menu.

Firm Name

Location

Firm Name ▾

Pukashell Designs, LLC

Honolulu, Hawaii

Firm information may be edited or deleted by clicking the applicable icon.



✓ Firm Information

Firm (or Branch Office) Name *
PUKASHELL DESIGN, LLC

Name of Firm (if branch office)

Street *
630 S. Beretania Street

City *
Honolulu

State *
Hawaii

Zip code *
96843

Year Established *
1916

DUNS Number *
123456789

Ownership Type *
Limited Liability Corporation

Small Business Status *
N/A

Former Firm Names (If applicable)

Former Firm Name

Add Former Firm Name

Save

Cancel

✓ Point of Contact

Year Established

Point of Contact Name *
Kimo Aloha

Title *
Office Manager

Telephone Number *
8087485000

Email Address *
aloha.kimo@email.com

Save

Cancel

- Fill in the applicable Firm Information for your company and Point of Contact.
- Click "Save."

Employees By Discipline

Please list all the professional services specialty areas the firm has and the number of employees they have for each specialty area. Please use [Appendix list](#) for function code. If you do not see a specific speciality, please use the code 00 and fill in the discipline.

<u>Function Code/Discipline</u>	<u>Firm Employees</u>	<u>Branch Employees</u>
Discipline * 06 - Architect	No. * 3	No.
Discipline	No.	No.
+ Add Row		
Total	3	-

00 - Other Discipline

01 - Acoustical Engineer

02 - Administrative

03 - Aerial Photographer

04 - Aeronautical Engineer

05 - Archeologist

06 - Architect

07 - Biologist

08 - CADD Technician

[Save](#) [Cancel](#)

- Each person may be counted only once according to their primary function.
- If Part II is prepared for a firm (including all branch offices), enter the number of employees by disciplines in the “Firm Employees: column.
- If Part II is prepared for a branch office, enter the number of employees by discipline in the “Branch Employees” column and for the “Firm Employees” column.
- As disciplines are added they are greyed out from the selection box to prevent listing the same discipline more than once, however, the “00” code may be selected more than once to fill in disciplines that are not listed.

PROFILE OF THE FIRM'S EXPERIENCE

- Complete this section for the firm or branch office for which this Part II is prepared.
- Enter the experience categories which most accurately reflect the firm's technical capabilities and project experience from the dropdown Appendix list. Use code "XX" for any discipline not on the list and fill in the description.
- After the listed experience categories, write in any unlisted relevant project experience categories and leave the profile codes blank.
- For each type of experience, enter the appropriate revenue index number to reflect the professional services revenues received annually (averaged over the last 5 years) by the firm or branch office for performing that type of work.
- A particular project may be identified with one experience category, or it may be broken into components, as best reflects the capabilities and types of work performed by the firm. However, do not double count the revenues received on a particular project.

✔ Profile of Firm's Experience

Please list all the profile of firm's experience and annual average revenue for the last 5 years. If you do not see a specific experience, please use the code XX and fill in the discipline.

Please use [Appendix list](#) for Profile code. See the chart below for the "Revenue Index Number"

Profile Code / Experience

Profile Code / Experience *
C15 - Construction Management

<u>Profile Code / Experience</u>	<u>Revenue Index Number</u>
A01 - Acoustics, Noise Abatement	
A02 - Aerial Photography; Airborne Data and Imagery Collection and Analysis	
A03 - Agricultural Development; Grain Storage; Farm Mechanization	4
A04 - Air Pollution Control	1
A05 - Airports; Nav aids; Airport Lighting; Aircraft Fueling	2
A06 - Airports; Terminals and Hangars; Freight Handling	3
A07 - Arctic Facilities	4
A08 - Animal Facilities	
A09 - Anti-Terrorism/Force Protection	

[+ Add Row](#)

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

- | | |
|---|---|
| 1. Less than \$100,000 | 6. \$2 million to less than \$5 million |
| 2. \$100,000 to less than \$250,000 | 7. \$5 million to less than \$10 million |
| 3. \$250,000 to less than \$500,000 | 8. \$10 million to less than \$25 million |
| 4. \$500,000 to less than \$1 million | 9. \$25 million to less than \$50 million |
| 5. \$1 million to less than \$2 million | 10. \$50 million or greater |

Save

Cancel

✓ Annual Average Professional Services Revenues

Annual Average Professional Services Revenues of Firm for Last 3 Years.

Please use the chart below to identify the revenue index number for the following:

City and BWS Work

2

Non City and BWS Work

2

Total Work

4

- Enter the appropriate revenue index numbers to reflect the professional services revenues received annually (averaged over the last 3 years) by the firm or branch office.
- Indicate City and BWS work (performed directly for the City & County of Honolulu or BWS, either as the prime contractor or subcontractor), non-City and BWS work (all other domestic and foreign work).
- Enter the total work.

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

1. Less than \$100,000
2. \$100,000 to less than \$250,000
3. \$250,000 to less than \$500,000
4. \$500,000 to less than \$1 million
5. \$1 million to less than \$2 million
6. \$2 million to less than \$5 million
7. \$5 million to less than \$10 million
8. \$10 million to less than \$25 million
9. \$25 million to less than \$50 million
10. \$50 million or greater

Save

Cancel

When finished click "Save."



PREPARING AND SUBMITTING QUALIFICATIONS FOR INDIVIDUAL PROJECT CATEGORIES

SUBMITTING QUALIFICATIONS FOR PROJECT CATEGORIES

Using the Submission Dashboard, a company may select any number of **Project Categories** it wishes to submit qualifications for, complete all the fields for the Category using the information that inputted under the Qualification Editor, attach all required supporting documents, and submit the qualifications.

Submission Dashboard

ADD ALL PROJECT CATEGORIES YOUR COMPANY WISHES TO SUBMIT QUALIFICATIONS FOR.

#1 - Click "Add/Remove" "Project" to start a submission.

Add/Remove Project

Select Project Category


Please select a project category or categories from the list provided.

#2 - Select the appropriate Division and Project Category from the dropdown menus.

Division * ▼ Project Category * ▼

Add Project

#3 - Click "Add Project."

Division	Project Category	Submitted Date	
Capital Projects	22-01CP: Archaeological Services	N/A	
Water Quality	22-05WQ: Environmental Assessments & Project Management Services	N/A	

As Project Categories are added they will appear in the list.

Click the trash icon to remove a category,

#4 - Once all desired categories have been added and appear in the list, click Continue.

Continue

From the Submission Dashboard page, you may:

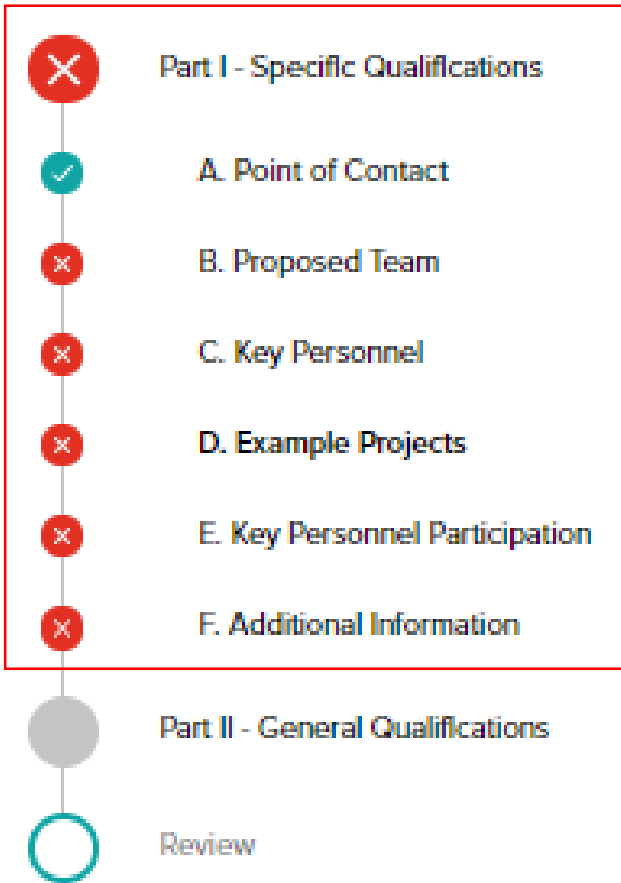
- Edit / complete a Project Category submission that has not been submitted.
- See the submission date of the categories that have been submitted.
- View, download/ save a PDF copy of the submission. Please see pages 40-43 of this Guide for download/save instructions.

Submission Dashboard

Add/Remove Project

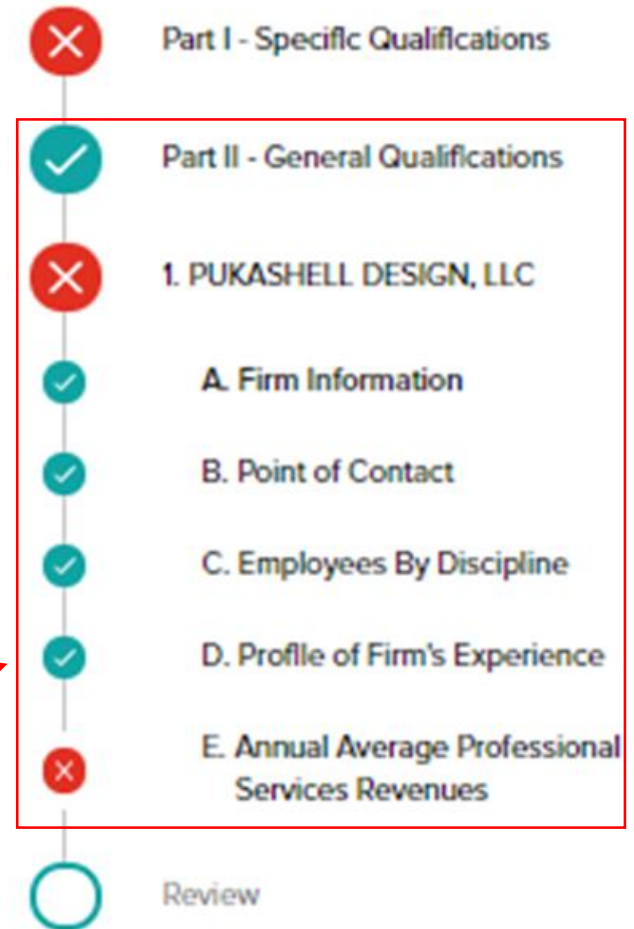
Division	Project Category	Submitted Date		
Capital Projects	22-02CP: Architectural Services	5/24/2021 19:06	PDF	Edit
Water Quality	22-05WQ: Environmental Assessments & Project Management Services	5/28/2021 1:15	PDF	Edit
Information Technology	22-07IT: SharePoint Consulting Services	N/A	PDF	Edit
Executive Support Office	22-01ESO: Legal Counsel	N/A		Edit
Finance	22-03F: Investment Services	N/A	PDF	Edit


SUBMISSION DASHBOARD NAVIGATION PANEL





- While completing a Project Category submission you may use the side navigation panel to jump to different sections.
- The icons indicate the status for each section.
- For project categories that require a SFR330, the side navigation panel will be split between two main sections of:


- Part I - Specific Qualifications and
- Part II - General Qualifications.



 The green check mark icons will indicate that all required fields have been completed.

 The red X icons will indicate there are incomplete required fields.

 The open circle indicates that users are currently in progress of a section.

 Grey circle indicates that the section has not been viewed by any user yet.



PART I

SPECIFIC QUALIFICATIONS

COMPLETING A PROJECT CATEGORY SUBMISSION

- Part I - Sections A-E (i.e., Point of Contact, Proposed Team, Key Personnel, Example Projects) have dropdown menus that allow you to select information entered in the Qualification Editor. (See screenshots below.)
- When completing a project category submission, if you want to add information that was not entered in the Qualification Editor, use the dropdown menu and select the option to enter “New” information in that particular project category submission.

Part I - Specific Qualifications

A. Point of Contact

Please select or fill in the detail below for the point of contact for this project.

Select Point of Contact *

This field is required

- Aloha, Kimo
- Puka, John
- Shell, Jane
- New Point of Contact-

Save and Exit

< Back

Next Step >

Qualification Editor

Part I - Specific Qualifications

Point of Contact

Proposed Project
Category Team

Key Personnel

Example Projects

Part II - General Qualifications

- **Note:** If you add in “New” information while entering the project category submission information, the new information added will not save and update in the Qualification Editor for future use.
- If you wish to be able to select the information for other project categories, click “Save and Exit” in the upper right corner of the page and return to the Qualification Editor to add the information in the appropriate section and save the information. When you return to the Submission Dashboard the updated information will appear in the applicable dropdown menu.

Part I - Specific Qualifications

Save and Exit

B. Proposed Team

Please select or fill in the proposed team for this project.

Select Proposed Team *

- Architectural Services
- Civil Engineering
- Legal Services
- Mechanical Engineer
- New Proposed Team-

➤ For each section use the dropdown menu to select the applicable information that you entered in the Qualification Editor or enter New information.

➤ Click "Next Step".

< Back Next Step >

B. Proposed Team

Please select or fill in the proposed team for this project.

Title of Proposed Team Set
Architectural Services

What is the role status for the proposed team?

Prime JV Partner Subcontractor

Firm Name
Pukashell Designs, LLC

Roles In This Contract
Prime Consultant

Address
630 S. Beretania Street, Honolulu, HI 96743

Check if branch office

Remove Team

What is the role status for the proposed team?

Prime JV Partner Subcontractor

Firm Name
Consultants R-US

Roles In This Contract
Electrical Engineer

Address
630 S. Beretania Street, Honolulu, HI 96743

Check if branch office Add Another Team

Organizational Chart

An Organizational Chart is required for the proposed team for submission.

Please upload your proposed team's organizational chart.
(Must be: PDF and no larger than 15MB)

ORGANIZATION CHART UPLOAD FOR THE CONSULTANT PORTAL.pdf X



Upload Chart

< Back

Next Step >

➤ Verify the information that populates from the Qualification Editor.

➤ Remember that any changes made to the information that populates from a dropdown menu selection will not be automatically saved in the Qualification Editor section. If you wish to be able to select the information for other project categories, click "Save and Exit" in the upper right corner of the page and return to the Qualification Editor to add the information in the appropriate section and save the information then return to the Submission Dashboard to edit the project category.

➤ Click "Next Step."

➤ In Part I Sections C (Key Personnel) and D (Example Projects) once a selection is made from the dropdown menu the selection will gray to avoid inserting duplicate entries.

➤ The selections also appear in the Submission Dashboard on the left side of the screen.

Part I - Specific Qualifications

Save and Exit

C. Resumes of key personnel who will provide services for this project category

Select Key Personnel*

Add Key Personnel

- ALOHA, KIMO — MECHANICAL ENGINEER
- PUKA, JOHN — PRINCIPAL -IN-CHARGE
- SHELL, JANE — PROJECT ENGINEER
- New Key Personnel-

	Name	Title	First Name ▾
1.	SHELL, JANE	PROJECT ENGINEER	
2.	PUKA, JOHN	PRINCIPAL -IN-CHARGE	

< Back Next Step >

➤ Companies may add as many key personnel for each project category as applicable by using the dropdown menu and clicking “Add Key Personnel.”

Part I - Specific Qualifications

A. Point of Contact

B. Proposed Team

C. Key Personnels

1. SHELL, JANE

2. PUKA, JOHN

D. Example Projects

1. Dales Reservoir Repairs VI

E. Key Personnel Participation

F. Additional Information

Part II - General Qualifications

Review

Part I - Specific Qualifications

Save and Exit

D. Example Projects which best illustrate the firm's qualifications for this project category

Present up to **10 projects** with emphasis on previous City and Board of Water Supply projects.

Select Example Project*

Roundtop Wells VI

Dales Reservoir Repairs VIII

Add Example Project

-New Example Project-

Example Project Title

1.	Dales Reservoir Repairs VIII	
----	------------------------------	--

< Back Next Step >

➤ Companies may add up to ten (10) Example Projects for each project category submitted.

E. Key Personnel Participation

Place a "✓" under project key number for participation in same or similar role.

Name of Key Personnel	Role in Example Project	Example Projects Listed in Section E									
		1	2	3	4	5	6	7	8	9	10
FUKA, JOHN	PRINCIPAL -IN-CHARGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SHELL, JANE	PROJECT ENGINEER	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ALOHA, KIMO	MECHANICAL ENGINEER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Example Project Key

No.	Title of Example Project (from Section F)	No.	Title of Example Project (from Section F)
1	Dales Reservoir Repairs VIII Honolulu, Hawaii	6	
2	Roundtop Wells VI Honolulu, Hawaii	7	
3	Birdie Nest Unlimited Honolulu	8	
4		9	
5		10	

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Next Step >

➤ The selections made for Key Personnel and Example Projects will automatically be inserted to Section "E – Key Personnel Participation" tables.

➤ Please place a "✓" for the Example Project(s) that each Key Personnel participated in the same or similar role.

➤ Click "Next Step."

Part I - Specific Qualifications

F. Additional Information

Save and Exit

Provide any additional information at your discretion.

This field is only required if a PDF is not uploaded.

0/1500

For each project category being submitted that requires the SFR330 Form to be completed, companies must include the "SECTION F: ADDITIONAL INFORMATION" listed in the Notice to Providers of Professional Services. Please use the SFR330 Additional Information Template provided below for the Additional Information, save the document, convert it to a PDF document, and upload it to the Portal. Upload a maximum of ten (10) PDF documents, each no larger than 15MB.

 [SFR330 Additional Information Template](#)

 [Project Category 22-02CP Additional Information.pdf](#) 

To remove uploaded documents, click the "X".

Upload PDF

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Next Step >

➤ **Please download and use the "SFR330 Additional Information Template" Word document from Portal or the Notice to include the information and convert the Word document to a PDF to upload to the Portal.**

➤ **A maximum of ten (10) PDF documents, each no larger than 15MB may be uploaded for Section F.**

➤ **Click "Next Step"**

PART I SECTION F ADDITIONAL INFORMATION

➤ **For each project category being submitted that requires the SFR330 Form to be completed, companies must include the "SECTION F: ADDITIONAL INFORMATION" listed in the Notice to Providers of Professional Services.**

SECTION F: ADDITIONAL INFORMATION:

Providers shall upload the information listed below as separate PDF attachments under section "F Additional Information" in the Portal. Please use the "SFR330 Additional Information Template" provided with this Notice for information that the firm wishes to submit for this section and convert the document to a PDF to upload to the Portal. Please limit the number of attachments uploaded for Section F to a maximum of ten (10) attachments each no larger than 15MB.

1. Letter of interest indicating the specific categories in which services are offered.
2. A Certificate of Vendor Compliance as issued by the State Procurement Office via an online system, also referred to as "Hawaii Compliance Express". Details regarding this online application process can be viewed at: <http://vendors.ehawaii.gov/hce/>
3. The following: Please use the "Attachment F Template" to provide the following information and convert the Word document to a PDF to upload to the Portal.
 - a. The names and phone numbers of up to five (5) clients who may be contacted, including at least two (2) for whom services were rendered during the preceding year;
 - b. A listing of all projects currently under contract with the Board of Water Supply and/or the City and County of Honolulu;
 - c. A listing of all Board of Water Supply projects in the last 10 years.
 - d. Past record of performance on contracts with respect to cost control, quality of work, and ability to meet schedules
 - e. Other pertinent data related to the project category;
 - f. Any promotional or descriptive literature that the firm desires to submit and

Please note that while photos of projects are not prohibited, the inclusion of photos is discouraged. Focus should be given to providing the information requested in organized, concise, comprehensive narratives that give BWS a clear understanding of the firm and proposed team's qualifications, experience, history of working together, and commitment to provide the described professional services.



PART II

GENERAL QUALIFICATIONS

PART II GENERAL QUALIFICATIONS

22-02CP: Architectural Services

- ✓ Part I - Specific Qualifications
- ✗ Part II - General Qualifications
- Review

Part II - General Qualifications

Save and Exit

If a firm has branch offices, complete for each specific branch office seeking work

Add all firms and branches that are seeking work for this project category

Select Branch or Firm *

PUKASHELL DESIGN, LLC, Honolulu Hawaii

-New Firm or Branch Office-

Add Firm/Branch

Firm/Branch Name

City, State

< Back

Next Step >

- When completing the information for a specific project category, Part II allows users to select information that was inputted in the Qualification Editor to automatically populate the fields or a new information and input the information directly into the submission.
- If you select a company that is listed in the dropdown menu, all the information inputted for the company in the Qualification Editor will automatically populate for you to review and edit if necessary.

- ✓ Part I - Specific Qualifications
- ✓ Part II - General Qualifications
- ✗ 1. PUKASHELL DESIGN, LLC
- ✓ A. Firm Information
- ✓ B. Point of Contact
- ✓ C. Employees By Discipline
- ✓ D. Profile of Firm's Experience
- ✗ E. Annual Average Professional Services Revenues

Review all information for sections A-E and make changes if necessary.

A. Firm Information

Save and Exit

Firm (or Branch Office) Name *
PUKASHELL DESIGN, LLC

Name of Firm (if branch office) *

Street *
630 S. Beretania Street

City *
Honolulu

State *
Hawaii

Zip code *
96843

Year Established *
1916

DUNS Number *
123456789

Ownership Type *
Limited Liability Corporation

Small Business Status *
N/A

< Back **Next Step >**

B. Point of Contact

Save and Exit

Point of Contact Name *
Kimo Aloha

Title *
Office Manager

Telephone Number *
8087485000

Email Address *
aloha.kimo@email.com

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C. Employees By Discipline

Please list all the professional services specialty areas the firm has and the number of employees they have for each specialty area

Please use [Appendix list](#) for function code. If you do not see a specific specialty, please use the code 00 and fill in the discipline.

Save and Exit

Function Code/Discipline	Firm Employees	Branch Employees
Discipline * 06 - Architect	No. * 3	No.

< Back **Next Step >**

D. Profile of Firm's Experience and Annual Average Revenue for Last 5 Years

Please list all the profile of firm's experience and annual average revenue for the last 5 years. If you do not see a specific experience, please use the code XX and fill in the discipline.

Please use [Appendix list](#) for profile code. See the chart below for the "Revenue Index Number"

Save and Exit

Profile Code / Experience	Revenue Index Number
Profile Code / Experience * C15 - Construction Management PROFESSIONAL SERVICES REVENUE INDEX NUMBER	2

1. Less than \$100,000
2. \$100,000 to less than \$250,000
3. \$250,000 to less than \$500,000
4. \$500,000 to less than \$1 million
5. \$1 million to less than \$2 million
6. \$2 million to less than \$5 million
7. \$5 million to less than \$10 million
8. \$10 million to less than \$25 million
9. \$25 million to less than \$50 million
10. \$50 million or greater

< Back **Next Step >**

E. Annual Average Professional Services Revenues of Firm for Last 3 Years

Please use the chart below to identify the revenue index number for the following:

City and BWS Work 2

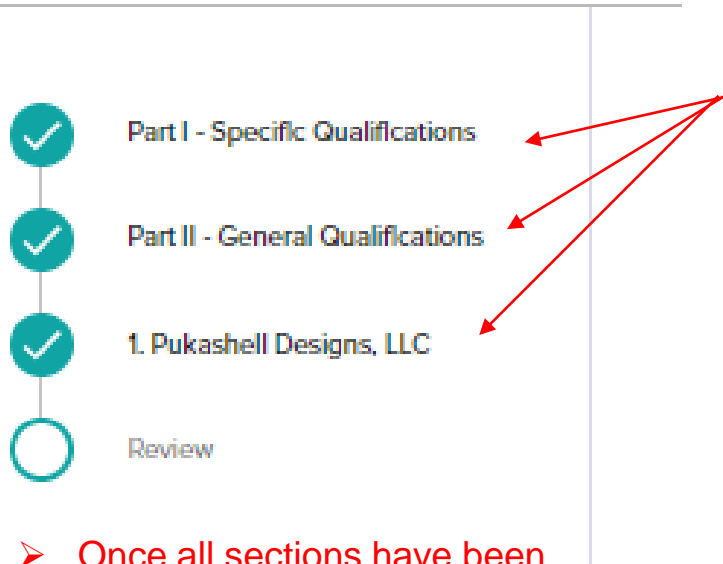
Non City and BWS Work 1

Total Work 3

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

1. Less than \$100,000
2. \$100,000 to less than \$250,000
3. \$250,000 to less than \$500,000
4. \$500,000 to less than \$1 million
5. \$1 million to less than \$2 million
6. \$2 million to less than \$5 million
7. \$5 million to less than \$10 million
8. \$10 million to less than \$25 million
9. \$25 million to less than \$50 million
10. \$50 million or greater

< Back **Next Step >**

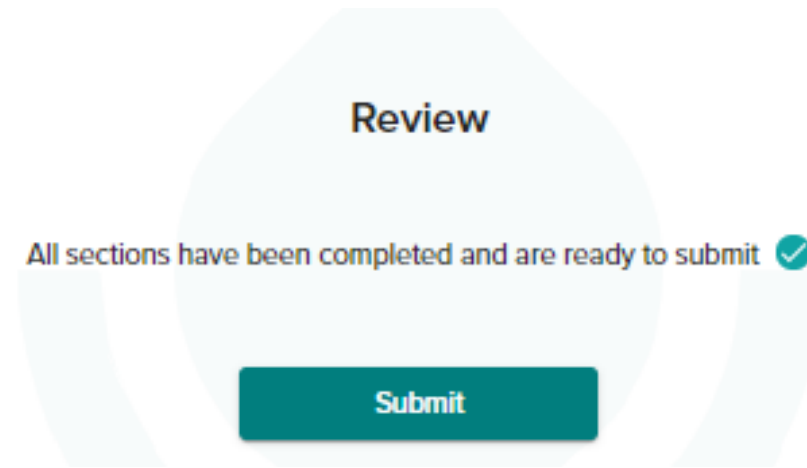


- Once all sections have been completed the qualifications may be submitted. Only users with a “Company Admin” Role may submit the qualifications by checking the box and clicking the “Submit” button.
- See the User Management Guide for additional information on managing user logins

- **Please review the entire submission before submitting. Once submitted, you will no longer be able to make changes to your qualifications for the submitted project category.**

SUBMITTING QUALIFICATIONS

- You may download and save a copy of the submission by jumping to any section and clicking the “Save and Exit” button on the top right corner of the screen to go back to the Submissions Dashboard. **(Note: Download/Save a PDF copy is not available to submissions that do not use the SFR330 format.)**



Only users with a role designation of a “**Company Admin**” may complete this section to submit qualifications on behalf of the company.

By submitting this information, the authorized representative of the company certifies that to the best of their knowledge and belief, all information provided is true and correct and understand that they may be contacted to verify and/or clarify the information provided herein. Additionally, the representative certifies that the company and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any federal department or agency;
 2. Have not within a three-year period preceding this submission been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, State or County) transaction or contract under a public transaction; violation of federal or State antitrust statutes or commissions of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, State or County) with commission of any of the offenses enumerated in paragraph 2 of this section;
 4. Have not within a three-year period preceding this submission had one or more public transactions (federal, State or County) terminated for cause or default;
 5. Does not have any conflict of interest in performing services for the Board of Water Supply and/or the City and County of Honolulu;
 6. Acknowledge and understand that it is the BWS's intent for the prime consultant to retain all necessary specialty subconsultants required for a project and have no objections to retaining specialty subconsultants (i.e., environmental, geotechnical, etc.) required for the work under the prime contract with the BWS.
- By checking this box, I agree that I am an authorized representative of the company and approve of the statements made in this submission.

➤ To submit the qualifications, a Company Admin user must check the box and click "Accept & Submit."

Note: Once submitted, you will no longer be able to make changes to your qualifications for this project category.

→ **Accept & Submit**

[Cancel](#)

no-reply@mg.boardofwatersupply.com

To: John.Doe@email.com, Jane.Doe@email.com

CC: Professionalservices@hbws.org

Subject: Project Category 22-02CP Archaeological Services - Pukashell Design, LLC

A confirmation email will be sent to the email address for:

- The Company Admin User who completed the submission.
- The company contact.
- Board of Water Supply Procurement Office.



Aloha,

This email is to confirm that the Board of Water Supply has received your submission of professional service qualifications for **Project Category:22-02CP Archaeological Services.**

Thank you for your interest in providing professional services to the Board of Water Supply.

Thank you,

Board of Water Supply

Procurement Office

(808) 748-5071

Professionalservices@hbws.org

✔ Qualifications have been submitted

Return to Dashboard

- Return to the Submission Dashboard to download/save a PDF copy of the final submission for your records. (Note: download/save a PDF copy is not available for to submissions that do not use the SFR330 format.)




Download/Save Instructions

Users completing submissions for project categories that use the SRF330 format may download/save a PDF copy of the submission at any time prior to submitting, and after the qualifications have been submitted from the Submission Dashboard.

- From any screen in the Qualification Editor, click the **Save** button at the bottom of the screen and then click the “Submission Dashboard” in the left navigation panel.
- From any screen in a submission, click the **Save and Exit** button at the top right of the screen and you will automatically return to the Submission Dashboard page.

Submission Dashboard

Add/Remove Project

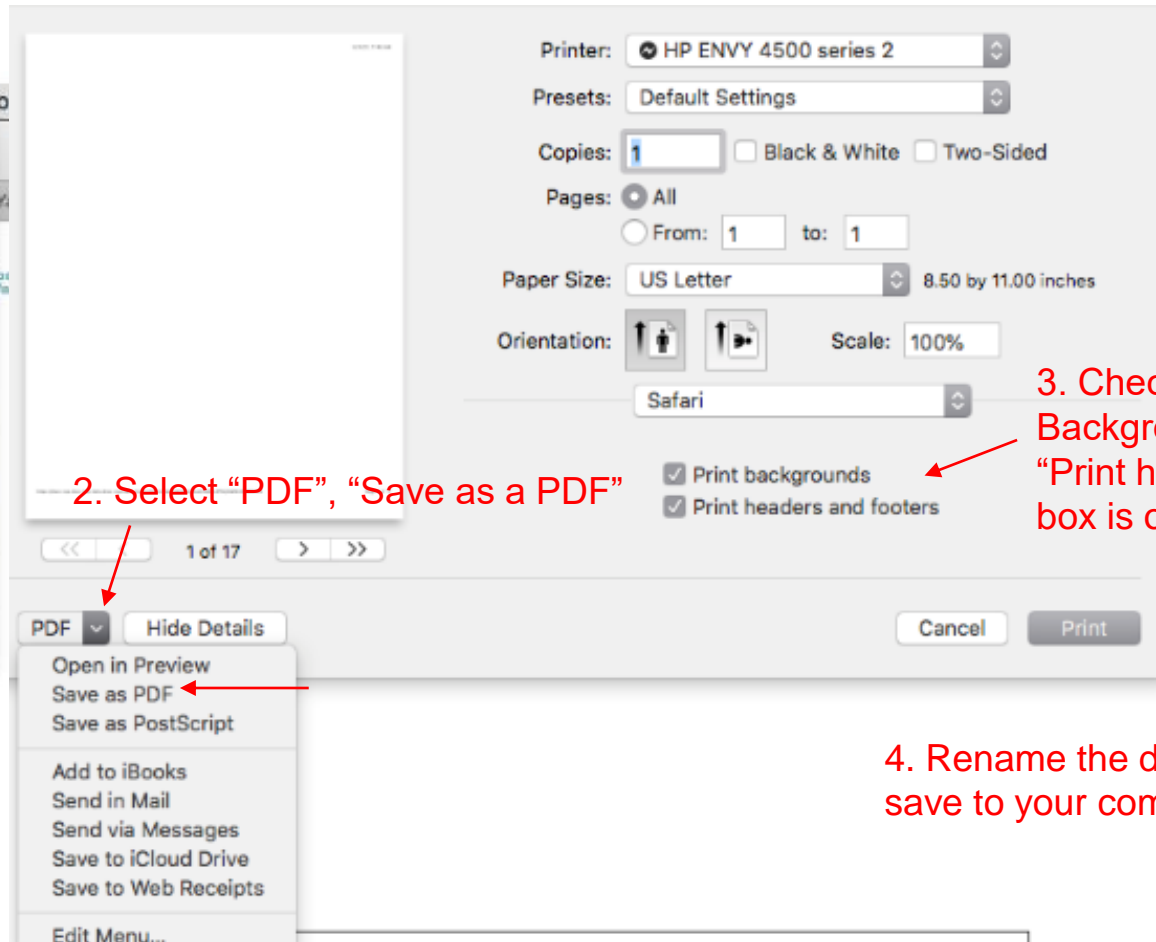
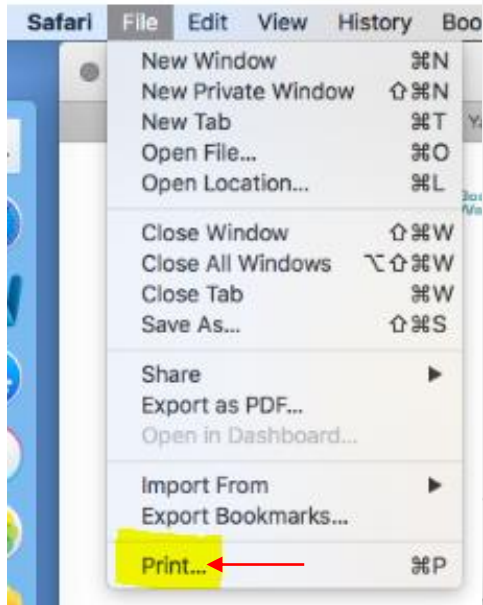
Division	Project Category	Submitted Date		
Water Quality	22-05WQ: Environmental Assessments & Project Management Services	5/28/2021 1:15	 PDF	Edit
Information Technology	22-07IT: SharePoint Consulting Services	5/29/2021 18:22	 PDF	Edit
Capital Projects	22-02CP: Architectural Services	N/A	 PDF	Edit

- Click the download/PDF and follow the instructions on the next page based on the browser that you are using.



Apple Safari

1. Select "Print" from the "File" menu.



2. Select "PDF", "Save as a PDF"

3. Check the "Print Background" box. (The "Print headers and footers" box is optional.)

4. Rename the document and save to your computer.



Google Chrome

Back	Alt+Left Arrow
Forward	Alt+Right Arrow
Reload	Ctrl+R
Save as...	Ctrl+S
Print...	Ctrl+P
Cast...	
Translate to English	
View page source	Ctrl+U
Inspect	Ctrl+Shift+I

1. Anywhere on the page “right click” your mouse and select “Print” from the menu.
2. Select “Save as PDF” from the “Destination” dropdown menu.
3. Check off “Background graphics” in “Options” (“Headers and footers” are optional.)
4. Click the “Save” button.
5. Rename and save the document to your computer.

Print 16 pages

Destination: Save as PDF

Pages: All

Layout: Portrait

More settings

Paper size: Letter

Pages per sheet: 1

Margins: Default

Scale: Default

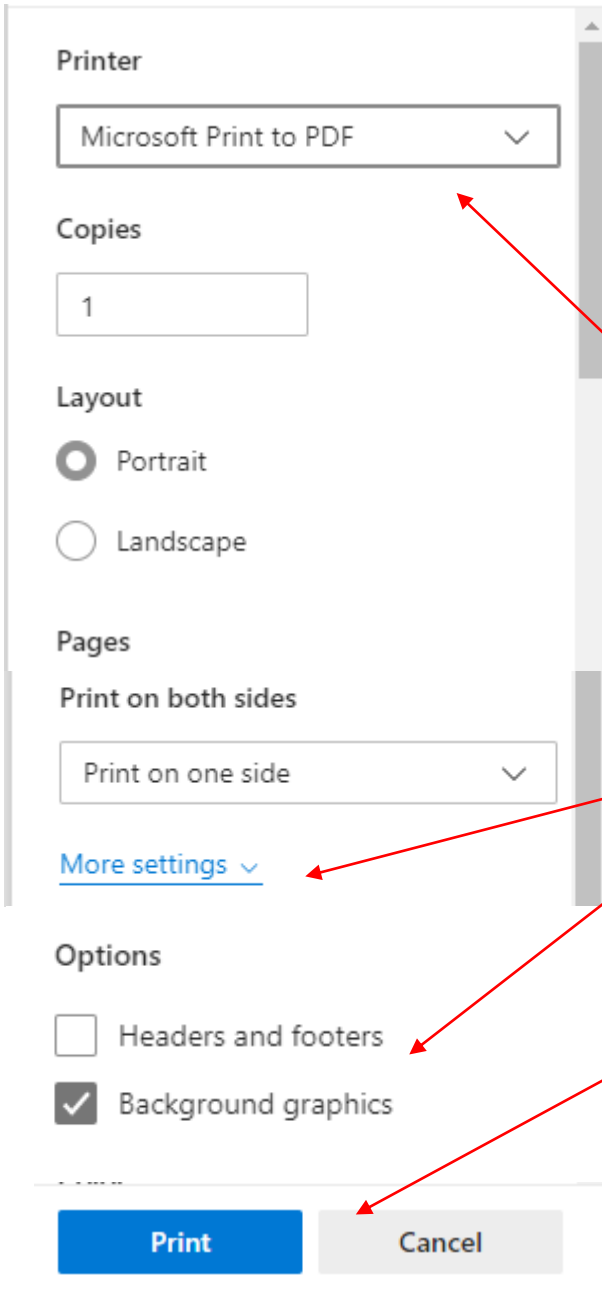
Options

- Headers and footers
- Background graphics

Save Cancel



Microsoft Edge



1. Press CTRL+P to open the print dialog menu.
2. Select “Microsoft Print to PDF” from the “Printer” dropdown menu.
3. Open the “More settings” dropdown check off “Background graphics” in “Options” (“Headers and footers” are optional.)
4. Click the “Print” button. Rename and save the document to your computer.



**Mahalo for
expressing an
interest in partnering
with the Board of
Water Supply!**

**For Assistance, please contact the BWS
Procurement Office via email at
Professionalservices@hbws.org or by
phone at (808) 748-5071**