

State Procurement Office
Webinar

Reporting/Posting Awards

SPO Workshop 141

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Reporting/Posting Awards Who this Workshop is for and What it is Intended to Do

- This workshop is designed for state personnel who:
 - are responsible posting award information;
 - conduct procurements and are responsible for ensuring the award information gets posted; and
 - Department/Jurisdiction Accounts Managers for PANS
- This workshop will:
 - demonstrate the mechanics of how to post awards;
 - review responsibilities for procurement personnel responsible for ensuring the information is posted; and
 - indicate some common mistakes made in posting awards.
- This workshop is not intended to:
 - teach you everything you need to know about procurement or award procedure. (There isn't enough time.) You must take the appropriate workshops for the method of procurement.

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Reporting/Posting Awards What Will be Covered

- About Webinars/Housekeeping
- Background
- What Must be Reported
- Timelines for Reporting
- Responsibilities and Working Together
- The Posting Site(s) and the Public Site
- Tools You Can Use
- Q & A

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Registration for SPO Workshops

- Registration for SPO workshops is now a 1 step process.
- On the Training Schedule and Registration page, select the date of the workshop and follow instructions for registering.
- For webinars, you will register on the webinar site. SPO will not send a webinar invitation.
- If attending a webinar as a group
 - All members of the group must register on the webinar site.

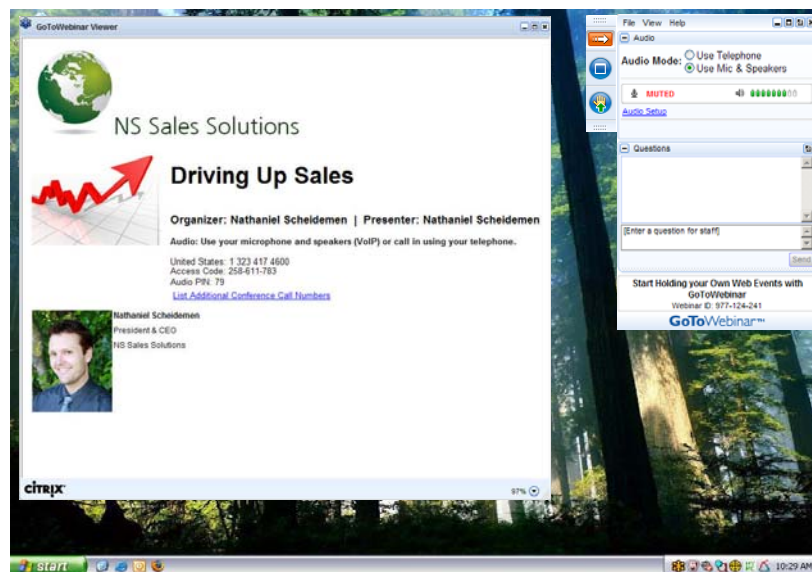
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About SPO Webinars

- Participation encouraged.
- If we cannot get to all your questions we will provide answers at a later date (FAQ, etc.)
- If there is more than one person participating at a single computer.
 - Everyone registers for this webinar.
 - All attendees in the group (including the person registered on the webinar site) complete the SPO Webinar Group Attendance form, scan it in and send it to: spo.training@hawaii.gov
 - If you attended by yourself (not as part of a group), no need to send in the group webinar attendance form.
 - **Send it in within 1 working day of the webinar**
- The SPO Webinar Group Attendance form is on the SPO training schedule along with the handouts.
<http://hawaii.gov/spo> > **Training and Informational sessions > Training for State and County Personnel**
- **DO NOT** send in the signed form prior to the workshop.

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The GoToWebinar Attendee View



Citrix online

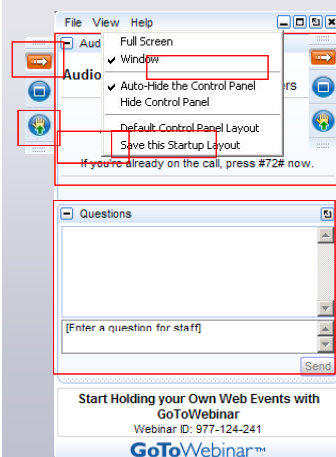
Webinar Viewer Window

- Having trouble seeing?
 - Maximize your viewer window; and/or
 - Increase the magnification in your viewer window (in lower right corner.)
- To exit full screen - GTW (GoToWebinar) control panel menu
 - click the button with the square on the tab or
 - View > window
- Note: Attendee Quick Reference is available
 - <http://hawaii.gov/spo>
 - Click **Training for State and County Procurement Personnel**
 - Click **About SPO Webinars** or wherever 'webinar' is a link
 - Click **FAQs and Quick Reference**



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How to Participate Today



- Open and close your Panel
- View, Select, and Test your audio
- Submit text questions
- Raise your hand
- Q&A addressed at the end of today's session

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More About SPO Webinars

- If you log in you may see a pop-up stating the presenter has not arrived yet. You do not need to do anything further. When the presenter arrives the appropriate screen will appear.
- This most often happens on the few occasions webinars are scheduled one right after another.

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Before You Procure/Administer Contract: Written Delegated Authority and Training

Before you develop/draft/participate in a solicitation, review, approve, conduct, manage, or administer a procurement/contract, you must:

- **Have written delegated authority per signed and submitted (to SPO) Form SPO-036.**
Note: See Procurement Delegation Memorandum 2010-01, as amended. Informational sessions including a webinar were held for ASOs/BMOs and their staff.
 - See : <http://hawaii.gov/spo>
 - > For State & County Personnel
 - > [Required Procurement Delegation](#) (there is also a link to the required (mandatory) training requirements site)
- **Have taken all required training.**
Reference: Procurement Circular 2010-05, as amended
Note: Some requirements have changed. Check the website periodically.
 - See: <http://hawaii.gov/spo>
 - > Training & Informational Sessions
 - > Training for State and County Personnel
 - > Training Requirements: Which Workshops Do I need to Take?

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If You Only Post Awards .. And Never Participate in Procurement in Any Other Way...

- You must attend SPO 140 or SPO 141 within **6 months** of being designated as a PANS user.

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Background

- Prior to 2010, accounts (login/password) were distributed to any state employee who asked for one.
- Database had over 600 users.
- No way to discern which accounts were active. When staff left, didn't notify SPO. Sometimes other staff took over the account without notifying SPO. Other times, new accounts were opened. Estimated actual users was under 200, probably less.
- March 2010- Awards posting sites (PRS and CDRS) and RFP posting site (RFPW) for health and human services were compromised.
- Sites were shut down completely.
- User table was compromised. Had to be replaced. SPO entered awards for departments.
- June 2010 awards reporting site operational for users. New way of handling user accounts. This affected all awards except professional services awards.
- September 2011 – the Professional Services Awards Reporting Site and Procurement Notices site (except for HePS procurement notices for solicitations) were compromised. Site was activated within 2 days. ICSD entered the data for about 2 weeks until 10/2011
- October 2011 – New Procurement Notices and Professional Services Awards sites were activated. Users who had a PANS account for awards and HHS RFPs, were given an account with the same user ID (login). Users were sent an email by the system and given a link and instructions for selecting their own password.

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Awards Reporting Site Something Better

- Too many accounts + no control=security risk. (Age of Innocence is over)
- If the need to amend, divisions could not access all existing data from the posting site when there were multiple accounts.
- Guessing game to find what name the account might be under.
- Poor data entry. Lack of knowledge on part of personnel posting.
- Better use of resources-more efficient to have core trained personnel rather than everyone, including those who rarely post having to be trained/attend training.

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What has Changed

- Accounts are distributed by division by department Accounts Managers.
- To obtain an account: personnel shall contact their department Accounts Manager.
 - Each department has internal procedures for requesting access. Contact your Department Accounts manger to find out what they are.
 - Do not call SPO to obtain an account.
- There still 2 different systems for reporting awards.
 1. **All awards except** profession service awards; and **RFPs for Health and Human Services.**
 2. **Procurement Notices for solicitations; and Professional Services Awards** (as defined in HRS 103D-304);
- Both systems have the same user ID (or login) but may have different passwords; depending on the user.

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Why We Need to Report/Post

- Open and transparent procurement process
- For protest process: For goods and services, HRS 103D-701 states vendor must submit protest:
 - “within five working days after the **posting** of award...” (emphasis added)
- For health and human services, HAR 3-143-619, 3-144-602, 3-145-608, 3-146-602, and 3-147-601 require reporting of awards in a manner prescribed by the administrator.
- It is the right thing to do

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Roles and Responsibilities

- **Accounts Manager**
Manages accounts for the department.
- **User**
Posts the Award, amendments and final award amount/term information.
- **Procurement Personnel**
Provides info to the user about the award and ensures it is posted correctly.
- **Contact Administrator**
Provides info about amendments and final award amount/term and ensures it is posted correctly.

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Responsibilities Accounts Manager

- Point of contact with SPO.
Users do not contact SPO for accounts.
- Delegate user accounts; report users to SPO.
Form SPO-040
- Oversight to ensure account security is maintained.
For example: Ensure users know cannot share account with everybody.
- Ensure info is entered correctly.
*Check public site periodically.
Monthly/quarterly as appropriate.
Look for obvious problems. For example: fails to complete fields; small purchase w/award amount of \$300,000; basis for exemption code is obviously wrong, etc.*
- Department PANS Accounts Managers are online at: <http://hawaii.gov/spo>
>For State and County Personnel
> Department and CPO Jurisdiction Administrators, Managers or Contacts for SPO Programs
- (There is also a link on the PANS page)

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Delegating Users

- Users must have some knowledge of computers and the internet.
Have to be able to navigate to the site and enter data.
- It is helpful if users have some knowledge of procurement.
 - Can serve as a check and balance.
 - Data entry forms can be completed by procurement officer or personnel conducting the procurement can assist and decrease the extent of the procurement knowledge necessary.
- Form SPO-040 to delegate users has instructions.

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Responsibilities Accounts Users

- Maintain security of your account.
- Enter data in a timely fashion.
- Check your work on the public site.

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Responsibilities Procurement Personnel

- **Know your internal procedures and who the person responsible for posting is.**
- **Submit the data for posting to the person who posts in a timely manner.**
 - Most data must be posted within 7 days.
- **Submit the information in a manner the person posting will understand.**
 - The person posting may not be knowledgeable of your contract or procurement; recommend using the appropriate data entry form and emailing it to the person responsible for posting.
- **Once posted, note that date actually posted and check that the award information is complete and correct.**
 - Vendors have 5 working days after the first date it is posted to protest (for procurements of goods, services and construction pursuant to HRS 103D).

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Responsibilities Contract Administrators

- **Know your internal procedures and who the person responsible for posting is.**
- **Submit the data for posting to the person who does post in a timely manner.**
 - Most data must be posted within 7 days.
- **Submit the information in a manner the person posting will understand.**
 - The person posting may not know your contract or procurement; recommend using the appropriate data entry form and emailing it to the person responsible for posting.
- **Once posted, note that date actually posted and check that the **award information** is complete and correct.**
 - If a protest should arise, the date award was actually posted is important in determining the deadline for protests.

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Award Information to be Reported Goods, Services and Construction

Method of Procurement, Exemption, Amendment or Contract End	Dollar Threshold or Condition
Competitive Sealed Bids	All Awards
Competitive Sealed Proposals	All Awards
Small Purchase Request for Quote	\$2,500 and above*
Sole Source	\$2,500 and above
Emergency	\$2,500 and above
Exemptions from HRS 103D	\$2,500 and above
Amendments, Change Orders, Supplemental Agreements, Extensions, etc.	When the change affects: •Funding amount or •Length of contract
Final Contract Amount and Term	All Awards
* Dollar threshold has changed for small purchases	

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Award Information to be Posted Professional Services Awards

- All awards of \$5,000 and greater procured pursuant to HRS Chapter 103D-304 Professional Services
- Must be posted no later than **7** days of date of award.
- Data remains on website for at least 36 months. Will automatically be removed. Do NOT delete.

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Award Information to be Posted Professional Services Awards

- Names of applicants submitted to the head of the purchasing agency;
- Awardee name;
- Contract dollar amount;
- Name of the head of the purchasing agency or designee making the selection;
- Any relationship of the principals to the official making the award.
- Names of review and selection committee members. ******

– Reference HRS Section 103D-304(i)
(******Mandatory for Executive Branch. Required by CPO.)

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What Must be Reported Health and Human Services

Method of Procurement, Exemption, Amendment or Contract End	Dollar Threshold or Condition
Competitive Method of Procurement (RFP)	All Awards
Competitive After-the-Fact-Secondary	All Awards
Restrictive Method of Procurement	All Awards
Treatment Method of Procurement	All Awards
Small Purchase Request for Quote	All Awards
Crisis Method of Procurement	All Awards
Exemptions from HRS Chapter 103F	All Awards
Final Contract Amount and Term	All Awards

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Timelines for Reporting/Posting Goods, Services and Construction

Method of Procurement, Exemption, Amendment or Contract End	Number of Days
All Methods of Procurement	7
Exemptions from HRS Chapter 103D	7
Amendments	7
Final Amount and Term	60

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Timelines for Reporting/Posting Health and Human Services

Method of Procurement, Exemption, Amendment or Contract End	Number of Days
All Methods of Procurement	7
Exemptions from HRS Chapter 103D	7
Amendments	7
Final Amount and Term	90

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Questions?

- Any questions?
- How are we doing so far?

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**Reminder: Responsibilities
Contract Administrators
What must be reported**

- Amendments/change orders/supplemental agreements that involve changes in:
 - Funding amount
 - Term of the contract
- End of Contract
 - Final awarded amount
 - Any changes in the contract term (final end date)

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Some Changes in Posting

- Reordered listing of methods of procurement/exemption.
- Basis codes for exemption/sole source are updated.
- Notice of award date is mandatory. (No longer states Notice of Award/PO date.)

Entries were reflecting notice of Award/PO as after services delivered.

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The Awards User/Posting Site

- <http://hawaii.gov/spo>
 - For State and County Personnel
 - Posting Procurement Awards, Notices and Solicitations (PANS)
 - Where to Post/Report
 - Awards

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Professional Services Awards Posting Site

- <http://hawaii.gov/spo>
- Contract Awards & Info
- Contracts for Goods, Services & Construction
- Professional Services Awards
- Lower right hand corner '**Log in**'

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Questions?

- Are you still with us?
- On to a demo...
 - <http://hawaii.gov/spo>
 - For State And County Personnel
 - Posting Procurement Awards, Notices and Solicitations (PANS)
 - Where to Post/Report

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The Public Site

- Where to direct vendors and the public
- Where to check to make sure your award, amendment and/or final expenditure posted correctly.
- <http://hawaii.gov/spo> > **Contract Awards and Info**
- **For awards except professional services**
 - Search
 - Search by Dept., then Division and either contract number or key word
- **For Professional Services Awards**
 - Professional Services Awards
 - Select your department from the dept list
 - Use search box to find your award

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Common Mistakes

- **Supplemental Agreements** are forms of amendments and should be entered as such. They are not to be entered as new contracts.
- Make sure the **basis for exemption** or sole source is correct and matches what is being purchased.
- **Notice of Award** means just that. The date **must** be before goods or services are delivered. It is not when the vendor is paid.
- Each **payment** to a single vendor is recorded as part of the award. Paying by multiple POs does not mean each **PO** is a new award. If you pay by multiple POs, enter a contract or first PO number. You may place the additional PO numbers in the comments field.
- Awards for HePS solicitations meeting the criteria stated earlier shall be posted. HePS does NOT do it for you.

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Supplemental Agreements

- Supplemental Agreements are not to be entered as separate contracts/awards. They are amendments.

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Tips on Entering Data:
Funding Amount Fields, Amendments

- In original amount, enter an ***estimate*** of the total amount to be expended if the contract is not a fixed price contract.
- When contract ends, enter the amount actually expended in the **final expended amount** field.
- Amendment Amount: the amount of the change to the original award in the amendment, not the total contract amount. Amendment increases award by \$28,000, enter 28000 as the amendment amount.

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**Awards Reporting
Do's and Don'ts**

- Entries that are not acceptable in the description field:
 - RFP-ADR-06-22
(Do not only enter the RFP number)
 - Consulting Services
(Consulting services for what?)
 - Leaving the description field blank
 - “Year two of maintenance agreement...” (Is this part of another contract? An improper procurement?)

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Tips on Entering Data

- Complete all fields!
- Enter a brief but informative description in the description field.
- Remember open and transparent.
 - Do NOT use parens, commas, semi-colons, colons, etc or acronyms in the description field.
- **Important:** Review your entry on the public site to ensure it is correct.

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Departmental Allocation of Accounts

- SPO recommends one account per division with a primary user and 1 or 2 persons serving as back up. SPO does not need to know who the back up is.
- When you log in you will only be able to see/amend the awards entered in the account name.
 - If the primary person goes on vacation; and
 - the secondary person has their own account and enters a new award,
 - only the secondary person will be able to amend the award.
 - When the primary person returns, the only way the primary person will know an award has been entered is to look at the **public** site.

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Tools You Can Use All on the SPO Website

- Toolbox
 - Guide for Reporting/Posting Awards
(Have it open every time you post an award)
 - Quick reference - info you access quickly
(Do I have to report this how long to I have to get it posted?)
 - Data entry forms
 - Award
 - Amendment
 - Contract Close (Coming Soon)
 - FAQs
 - Reference (HAR, HRS, Procurement Circulars)
 - Watch for updates to these documents

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In Summary

- There are 2 sections for each awards site (Goods, services and Construction and Health & Human services):
 - User site: where users enter data, and
 - Public site: where all awards entered properly are visible to everyone. (<http://hawaii.gov/spo> > Contract Awards & Info)
- Once logged in on the user site , each account (login/password) can only see what has been entered by that account.
- User accounts are allocated by your department/jurisdiction accounts manager (Not SPO).
 - There is a link to Accounts Managers on the SPO website on the **For State and County Personnel** and the **PANS** pages

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In Summary

Continued

- **What:** (award information to be posted):
 - Awards
 - Amendments that change
 - funding amount, or
 - term of contract
 - Final amount awarded and final end date
- **When:**
 - notice of award : 7 days (or sooner), or
 - amendments: 7 days
 - final amount and term of contract:
 - 60 days (Goods, Services and Construction) or
 - 90 days (Health and Human Services) .

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In Summary

Continued

- There are 2 different systems for posting awards, notices and solicitations.
- The user ID (login) will be the same.
- Passwords may be different.
 - Depends on what the user chooses.
- Users can change their passwords.
 - Different processes for each system.

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Hints:

- Use the **Guides for Posting Awards** when you are posting
- Questions? Check the **Reporting/Posting Awards FAQ**.
- Not sure if something needs to be posted or when? Check the **Quick Reference**.

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State Procurement Office

The end. Thanks for attending!

If you attended as part of a group remember to complete any group attendance forms and email them to

spo.training@hawaii.gov

within 1 working day of the webinar.

Questions?

<http://hawaii.gov/spo>

- Mara Smith 587-4704
mara.smith@hawaii.gov
- Wendy Ebisui 586-0563
Wendy.mo.ebisui@hawaii.gov

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Useful Info on the SPO Website

<http://hawaii.gov/spo>

- For State and County Personnel (*bookmark this page*)
 - [Department and CPO Jurisdiction Administrators, Managers or Contacts for SPO Programs](#) (Who to call in your dept for HePS, pCard, PANS, Training)
 - [Written procurement delegation authority](#)
 - [Compliance, Procurement Code of Ethics](#)
 - Procurement:
[Purchasing Goods, Services and Construction](#)
(pages with information on each method of procurement)
 - [PANS- Info on posting...](#)
 - [Travel Services...](#)
 - [Purchasing Card](#) (pCard)
- SPO Forms
- Contract Awards and Info (Awards Public Site)
- Price and Vendor List Contracts
- Training and Info Sessions
- Procurement References
 - Hawaii Revised Statutes & Hawaii Administrative Rules
 - Procurement Circulars

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State Procurement Office Contacts for General and Specific Info

- **Donn Tsuruda-Kashiwabara** 586-0565
donna.tsuruda-kashiwabara@hawaii.gov
RFPs, specifications, emergency, sole source, professional svcs., exemptions
- **Mara Smith** 587-4704
mara.smith@hawaii.gov
HePS, PANS (Reporting/Posting Awards, Notices & Solicitations), SPO website (overall)
- **Kevin Takaesu** 586-0568
kevin.s.takaesu@hawaii.gov
IFBs, preferences, emergency, sole source, professional svcs., exemptions
- **Bonnie Kahakui** 587-4702
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Travel, pCard, emergency, sole source, professional svcs., exemptions, HePS
- **Wendy Orita** 586-0563
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Hawaii Compliance Express (HCE), Price & Vendor List Contracts, HePS
- **Stanton Mato** 586-0566
stanton.d.mato@hawaii.gov
Price & Vendor List Contracts
- **Corinne Higa** 587-4706
corinne.y.higa@hawaii.gov
Health & Human Services (all procurement methods, reporting, posting)
- **Stacey Kauleinamoku** 586-0571
stacey.L.kauleinamoku@hawaii.gov
Training, Delegated Procurement Authority

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