

**State Procurement Office**  
**Overview of the SPO Website  
and Posting Procurement Awards,  
Notices and Solicitations**

**Workshop SPO 140**

**An overview of the SPO Website and the  
systems for reporting/posting procurement  
awards, notices and solicitations**

1

**Overview of the SPO website and Reporting Systems (SPO 140)**

**Who this Workshop is For  
And What it is Intended to Do**

- This workshop is designed for state personnel who:
  - Have written delegated procurement authority for any method of procurement; or
  - Are contract administrators; or
  - Have been delegated to post or report procurement notices, awards or solicitations for goods, services or health and human services; or
  - Assist in procuring (purchasing) goods, services, construction or health and human services; or
  - Are interested in learning about information and resources available on the SPO website.
- This workshop will:
  - Help you take advantage of the resources on the SPO website by demonstrating the kinds of information available to both procurement personnel and the public; and
  - Provide an overview of the reporting/posting systems such as procurement notices and 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 you are conducting.
  - Serve in place of the handbooks/references SPO has produced and placed on the SPO website for reporting or posting procurement solicitations, notices, or awards. Should you need more detailed instruction on reporting/posting awards you may take SPO 141.

2

**SPO Website Overview and Reporting Systems (SPO 140)**

**What Will be Covered**

- Housekeeping (about webinars)
- In General
  - Why we post all the information – Transparency.
  - General organization of the SPO website.
  - Where to find information.
  - Brief overview of agency reporting requirements.
- Posting:
  - Procurement Notices
  - Solicitations
    - Health and Human Services RFPs
    - HePS
  - Awards
    - Hawaii Compliance Express
    - Posting Awards
    - Posting professional Services Awards
- Q & A

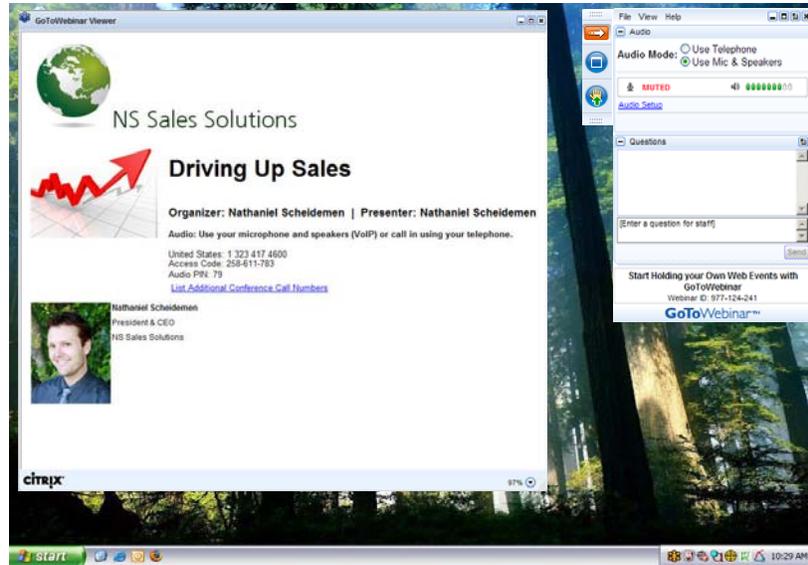
3

**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 [the email on the form](#)
  - 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> click **Training and Informational sessions > Training for State and County Personnel**
- **DO NOT send in the signed form prior to the workshop.**

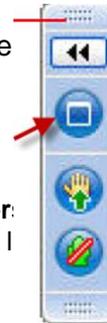
4

## The GoToWebinar (GTW) Attendee View

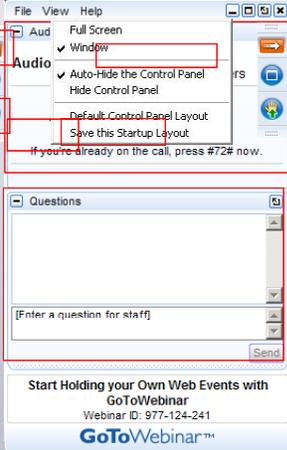


## Webinar Viewer Window

- 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 pane
  - 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 Per:**
  - Click **About SPO Webinars** or wherever 'webinar' is a l
  - Click **FAQs and Quick Reference**



## How to Participate Today



The screenshot shows a GoToWebinar control panel. The 'Audio' section is highlighted with a red box and contains the following options: 'Full Screen', 'Window', 'Auto-Hide the Control Panel', 'Hide Control Panel', 'Default Control Panel Layout', and 'Save this Startup Layout'. Below the 'Audio' section is a 'Questions' section with a text input field containing '[Enter a question for staff]' and a 'Send' button. At the bottom of the panel, there is a banner that reads 'Start Holding your Own Web Events with GoToWebinar Webinar ID: 977-124-241'.

- 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

cinjux online

## 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.

8

## Just a Reminder:

- This workshop does not cover everything required for reporting. It is an overview. Refer to:
  - Posting Procurement Awards, Notices & Solicitations  
<http://hawaii.gov/spo> > For State and County Personnel > Posting Procurement Awards, Notices & Solicitations (PANS)
  - Hawaii Revised Statutes (HRS)
  - Hawaii Administrative Rules (HAR);
  - Procurement Circulars;
  - Manuals/Handbooks; and
  - Other workshops, as appropriate.

9

## Why We Post all this Information

We use taxpayer funds; Our “shareholders” are the taxpayers (everyone). Like the private sector, we want best value. As the public sector we have additional obligations:

- 1. We must be open/transparent.**
  - Everyone has a right to know and have easy access.
- 2. We must be fair to all qualified vendors.**
  - Everyone has the right to compete.
- 3. We ARE accountable.**
  - Keep an auditable trail. (document, document, document!)
  - Follow standardized rules and procedures.  
(Statutes, Administrative Rules, Procurement Circulars, Internal Procedures)

10

## 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. Informational sessions including a webinar were held for ASOs/BMOs and their staff. Previous delegation remained in place until 4/30/11 or new delegations received, whichever was first.
  - See : <http://hawaii.gov/spo>
    - > For State & County Personnel
    - > [Procurement Delegation](#) (there is also a link to the required (mandatory) training requirements site)
- **Have taken all required training.**  
*Reference: Procurement Circular 2010-05*  
**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?

11

## The SPO Website:

- <http://hawaii.gov/spo>
- Bookmark this page.
- Access all other SPO web pages from here.
- When giving information to the public, always use the SPO homepage, followed by “click <link>”.  
For example:  
<http://hawaii.gov/spo>  
click **Procurement Notices**.
- **Why? Website addresses change.**

12

## Some Shortcuts in Instructions

- You may see instructions with a > between 2 links.  
For example:
- <http://hawaii.gov/spo> > Training > Who registered
- The > means **click**
- **click *Training*, then click *Who registered***

13

## General Organization of the Website

More than one way to get to information.

Goal : make information easier to find.

- **Points of view**
  - Vendors, procurement personnel, legislators, advocates, etc.
- **Categories of information**
  - Reference (HAR, HRS, Procurement Circulars or Directives),
  - training materials (manuals, guides, FAQs, etc.)
- **Information based on function**
  - Solicitations, award, contracting
  - Method of procurement

14

State Procurement Office  
 Overview of the SPO Website and  
 Posting Procurement Awards, Notices and Solicitations (SPO 140)

<b>Methods of Procurement</b>		
<b>Method</b>	<b>Bases for Use</b>	<b>Bases of Award</b>
Competitive Sealed Bids	Always used unless it is not feasible or practicable.	Lowest responsive, responsible bid.
Small Purchases	Purchases of smaller quantities for goods and services of less than \$100,000 and construction less than \$250,000.	Lowest responsive, responsible quotation.
Competitive Sealed Proposals	Competitive sealed bidding is not practicable; price is not the most critical factor.	Based on RFP evaluation criteria.
Multi-step Bid	Used when pre-qualification of offerors necessary before considering price.	Lowest bidder of qualified offerors.
Sole Source	Only one source for the required good, service, or construction.	Approved single source at agreed prices.
Emergency	Used to respond the needs that are immediate and serious that are a threat to life, public health, welfare, or safety.	Lowest responsive and/or responsible offeror.
Professional Services	Professional services as defined in rules and statutes	Qualified respondent that meets determined criteria; prices are agreed to.
Request for Interest (For Federal Grants)	Used prior to applying for the Federal grants where time is limited or economic situations require a "quick" selection process.	Criteria determined in RFI. 15

### SPO Website Logic

- **Points of view:**
  - State and County Procurement Personnel
    - For State and County Personnel (bookmark this page)
  - Vendors, Contractors and Service Providers
    - Doing Business with the State
  - The public
- **Other (Function and/or Category):**
  - Goods, Services and Construction
  - Health and Human Services
  - HAR, HRS, Procurement Circulars
  - Procurement Notices, Solicitations
  - Awards and contracts

## **PANS - Posting/Reporting Procurement Awards, Notices and Solicitations**

- Each department has appointed an Accounts Manager.
  - <http://hawaii.gov/spo>
  - *For State and County Personnel*
  - Department and CPO Jurisdiction Administrators, Managers or Contacts for SPO Programs
- Accounts are assigned by the Accounts Mgr. One account for each division/ administratively attached office - developed by SPO.
  - Accounts Mgrs. (not individuals) may request additional accounts.

17

## **Procedures for Obtaining Accounts**

- Each primary user completes & signs Form SPO-040
  - indicating that they will maintain security and attend required training.
  - *(There are instructions for form SPO -040. Read before completing.)*
- Form is signed and submitted only by **Accounts Mgr.**
- **Each division/branch, depending on size, should have one account.**
  - **Records entered cannot be moved from one account to another.**
  - **If someone leaves, another person needs to take over the account in case amendments need to be made.**

18

## Requiring An Account (Login/password)

- **For Notices and Solicitations:**
  - Procurement Notices \*
  - Health and Human Service RFPs\*\*
  - HePS\*\*\*
- **For Awards**
  - All awards except professional services\*\* (HRS 103D and 103F)
  - Professional Services\*
- **Hawaii Compliance Express**
- **Questions?**
  - HRS 103D Wendy Orita (and any HCE questions)
  - HRS 103F Corinne Higa (and training questions)

19

## 2 Systems Same Login

- When the procurement notices for solicitations site and the professional awards site were compromised **some time ago**, we anticipated it would move to all one system.
- But that was not to be...yet.

20

## **PANS Users have 2 different accounts**

- First account
  - Professional Services Awards; and
  - Procurement Notices of Solicitation
  - SPO established login (user ID) -system asks the user to establish a new password.
- Second account
  - Awards and
  - Health and Human Service RFPs
  - SPO established login (User ID) and password,
  - User may change the password after logging in.

21

## **How to Make the Passwords the Same**

- For awards reporting and Health and Human Services RFP:
  - Log in.
  - Look at the lower right menu.
  - Select change password.
- For Procurement Notices of Solicitations and Professional Services Awards:
  - **reset** your password.

22

## Accounts for HePS

- **Hawaii eProcurement System**
  - In order to have access, the following is required:
  - [Delegated Authority](#) (Form SPO-36)(Complete for method of procurement and HePS)
  - Taken [all required workshops](#)
  - Access is given by your **Department HePS Administrator**, not SPO.
  - Questions about HePS?
    - **Contact Your HePS Department Administrator!**
    - **Mara Smith**
    - **Wendy Ebisui**
    - **Bonnie Kahakui**

23

## Sites Requiring a Login/Password Additional Info – De-Activation

- **PANS**
  - Deactivation upon notification by Department /Jurisdiction Accounts Managers
  - (Generally –we don't want to de-activate –instead change the user
- **HePS**
  - No login for one year, or no procurements for two years, Deactivation by your Dept/Jurisdiction HePS Administrators.

24

## Procurement Notices for Solicitation

- This site has changed on the public view. Direct vendors to <http://hawaii.gov/spo> > **Procurement Notices for Solicitations**.
- Solicitations for IFBs conducted on HePS are not manually entered. HePS posts automatically, but only for solicitations (not for awards).
- There are 2 ways to log in to post solicitations that are not on HePS, here is one:
  - <http://hawaii.gov/spo>
  - For State and County Personnel
  - PANS
  - Where to log in and Post

25

## Procurement Notices

*continued*

- You may enter all info prior to the official posting date, it will automatically post on the date you indicate.
- Enter contact person, phone number, e-mail.
- Attached 'legal ad' format (if using one) **must** be .htm or .txt.
- If attaching a copy of the solicitation, format must be .pdf.
- Print copy of the notice **from the website on the first day it is advertised!** Complete attestation.
- Keep description concise and to the point.

26

### **Procurement Notices for Solicitation What Must be Posted**

- Competitive Sealed Bids
- Competitive Sealed Proposals
- Professional Services
- Requests for Interest for Federal Grants
- Multi-step Competitive Sealed Bids
- Requests for Information
- Requests for Proposals for Health and Human Services

27

### **Procurement Solicitation Notices Tips**

- Check the public site after uploading.
- Print the notice.
- If you wish to include Attachments, they should not be too large. (2-4 mg). If your document is larger, break it into parts.
- You may not have 2 files with the same name in each solicitation notice.

28

### **Procurement Solicitation Notices Do's and Don'ts**

- **Don't enter this:** The State of Hawaii, Department of Transportation, Division of Accounting, is requesting...
  - Too long- no one wants to read it
- **Do this-examples of acceptable entries:**
  - Bridge repair for the XX bridge...
  - Repair roofing at Kuhio Park Terrace.
  - Services to assist small businesses in applying for XXX federal grant program...

29

### **Procurement Solicitation Notices Conducted on HePS**

- Do not post manually on the Procurement Notices website. Once you have entered your solicitation in HePS, it will be posted automatically. For small purchases posted when open to all registered vendors
- Public site for HePS procurement Notices:
  - From Quicklinks: Procurement Notices > Procurement Notices for Hawaii eProcurement Solicitations
- To print a copy of the notice, use the search to find your solicitation and print.

30

## Procurement Notices for Solicitations Resources

- Use the [Procurement Notices for Solicitations Quick Reference](#)
  - For State and County Personnel
  - Posting Procurement Awards, Notices, and Solicitations (PANS)
  - Toolbox
  - Procurement Notices for Solicitations Quick Reference

31

## Hawaii Compliance Express (HCE)

- <http://hawaii.gov/spo>  
click **Hawaii Compliance Express**
- Government Employees can obtain access to HCE at no cost. Refer to FAQ...
- “Real Time” basis.
- Non-compliant vendor’s should contact the respective department to obtain compliance. **(Not SPO)**
- Substituted for tax clearance, labor cert., and COGS per HAR section 3-122-112.
- Allow for 10 working days for compliance status when first signing up.
- To obtain an account as a procurement personnel, create an account **using your work e-mail**. Send request to email indicated in Procurement Circular 2005-04 Amendment 3. Note: This process may be changing. Stay tuned.

32

## Hawaii Compliance Express (HCE)

- If vendor is registered in HCE, it is the responsibility of the purchasing agency to verify compliance and print/save the certificate.
  - Reference: Procurement Circular 2005-04, Amendment 3
- **Note:** If procuring on HePS, system will interface with HCE and obtain the compliance information when you select the award button.
- Reference:
  - HRS Section 103D-310
  - HAR Section 3-122-112
  - Procurement Circular 2005-04 and amendments 1-3

33

## Conditions under which

### Proof of Compliance is Required

- Proof of Compliance is required for the following Methods of Procurement:
    - Competitive Sealed Bid/Invitation for Bid (IFB);
    - Competitive Sealed Proposal/ Request for Proposal (RFP);
    - Professional Services;
    - Sole Source; **and**
    - Small Purchases of **\$2,500** and above\*
- \*Reference, Act 190, SLH 2011

34

## Proof of Compliance Required Before Award

- You do not want this to happen to you:
  - Vendor is given the notice to proceed.
  - Vendor cannot get the compliance documentation.
  - You, representing the state have authorized delivery.– Vendor is due his pay.
  - Vendor cannot be paid due to non-compliance.
  - Result:
    - Procurement Violation; and
    - Possible Administrative fine.

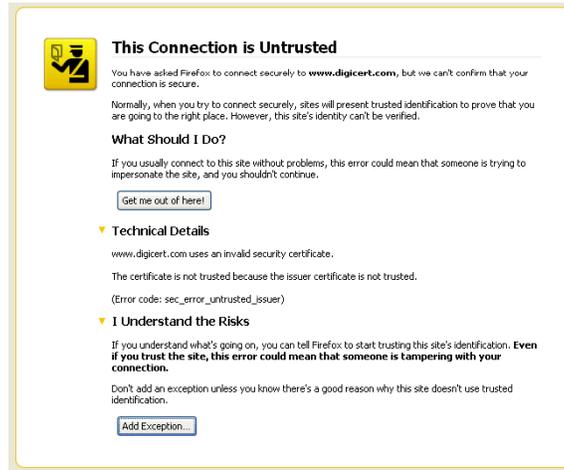
35

## Posting Awards

- <http://hawaii.gov/spo>
- **For State and County Personnel > Posting Procurement Awards, Notices & Solicitations (PANS).**
- On the website: Detailed instructions/manuals Procurement Circulars, Quick Reference, data entry forms, etc.
- The system records date posted and the most recent date it was saved(updated), you cannot change them.
- Users may only access awards posted by the user (login/password). **Cannot access another users posted awards.**

36

## When you first log in ... You May See Some Security Screens



**This Connection is Untrusted**

You have asked Firefox to connect securely to [www.dgicert.com](http://www.dgicert.com), but we can't confirm that your connection is secure.

Normally, when you try to connect securely, sites will present trusted identification to prove that you are going to the right place. However, this site's identity can't be verified.

**What Should I Do?**

If you usually connect to this site without problems, this error could mean that someone is trying to impersonate the site, and you shouldn't continue.

[Get me out of here!](#)

**Technical Details**

[www.dgicert.com](http://www.dgicert.com) uses an invalid security certificate.

The certificate is not trusted because the issuer certificate is not trusted.

(Error code: sec\_error\_untrusted\_issuer)

**I Understand the Risks**

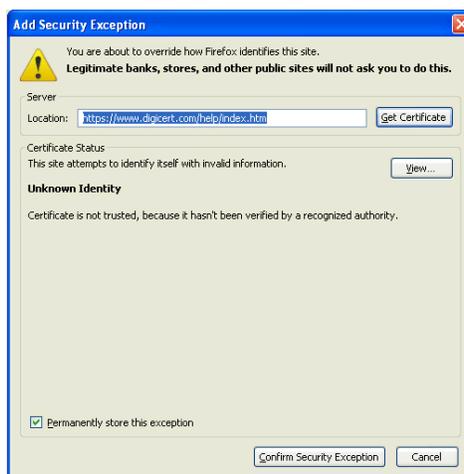
If you understand what's going on, you can tell Firefox to start trusting this site's identification. **Even if you trust the site, this error could mean that someone is tampering with your connection.**

Don't add an exception unless you know there's a good reason why this site doesn't use trusted identification.

[Add Exception...](#)

37

## -Security - Confirm Security Exception



**Add Security Exception**

You are about to override how Firefox identifies this site.  
**Legitimate banks, stores, and other public sites will not ask you to do this.**

Server

Location:  [Get Certificate](#)

Certificate Status

This site attempts to identify itself with invalid information. [View...](#)

**Unknown Identity**

Certificate is not trusted, because it hasn't been verified by a recognized authority.

Permanently store this exception

[Confirm Security Exception](#) [Cancel](#)

38

## Security for Posting Awards Click 'Yes'



39

## Awards that Must be Reported

Procurement Method	Dollar Thresholds	No. of Days of Award within which it must be Reported
Competitive Sealed Bids	All awards	7
Competitive Sealed Proposals	All awards	7
Small Purchases	<b>\$2,500 and above</b>	7
Sole Source	\$2,500 and above	7
Emergency	\$2,500 and above	7

40

**Awards Reporting System**  
**Other Awards that Must be Reported**

<b>What Must be Reported</b>	<b>Conditions Requiring Entry in Awards Reporting Site</b>	<b>No. of Days of Award within which it must be Reported</b>
Exemptions from HRS Chapter 103D	Awards \$2,500 and over	7
Amendments, extensions, change orders	Whenever the change affects: •Contract Term •Contract Amount	7

41

- Purchases that Should Not be Posted**
- Purchases from SPO Price/Vendor Lists.
  - Payments to/on behalf of employees for salaries, fringe benefits, professional fees, reimbursements.
  - Payments to satisfy obligations the State must pay: such as fees, settlements, subsidies, refunds, etc.
  - Dues and fees of organizations in which the state or its officers/employees are members.
  - Entitlement programs established by federal law (public, assistance, unemployment, workers comp, etc.)
- 42

## **Awards that Should Not be Posted** *(continued)*

- Utilities whose prices are regulated.
- Interisland airfare under current SPO exemption.

*Note: This listing is not complete. Check the handbook for a complete listing.*

43

## **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.

44

## 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?)

45

## 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.

46

## Supplemental Agreements

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

47

## Awards for Professional Services Method of Procurement

- <http://hawaii.gov/spo>
  - >Awards
  - >Awards for Goods, Services and Construction
  - > Professional Services Awards
- Or <http://hawaii.gov/spo/psa>
- Detailed instructions are on the PANS Toolbox site.
- The system records date posted, you cannot change it.
- Users may only access awards uploaded by the user (login/password).
- This is part of the same system as Procurement Notices for Solicitations.
- Previous awards are on the site but cannot be accessed.

48

### **Professional Services Awards What Awards Must be Posted**

- All awards of **\$2,500** 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 40 months. Will automatically be removed. Do NOT delete.

49

### **Professional Services Awards Award Information that Must be Posted**

- 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.)

50

### Useful Info on the SPO Website

<http://hawaii.gov/spo>

- [For State and County Personnel](#) (*bookmark this site*)
  - Posting Procurement Awards, Notices and Solicitations
- Forms
- Information on Methods of Procurement and Online Procurement Manuals
- Contract Awards and Info
- Price and Vendor Lists
- Travel Services
- Inventory Management and Excess Property
- pCard Information
- Training for State and County Procurement Personnel
- Procurement References
  - [Hawaii Revised Statutes & Hawaii Administrative Rules](#)
  - Procurement Circulars

51

### SPO Website Right Sidebar

- **Information**
  - Notices for Solicitation
  - Awards
- **Toolbox**
  - SPO Forms, AG Contract Forms
  - HCE
  - Additional info depending on location in the SPO website
- **Reference**
  - Statutes and Administrative Rules

52

## State Procurement Office

<http://hawaii.gov/spo>

The End

- Questions?
  - Visit the Website
  - Contact SPO

Mara Smith 587-4704 [mara.smith@hawaii.gov](mailto:mara.smith@hawaii.gov)

Wendy Ebisui 586-0563 [wendy.mo.ebisui@hawaii.gov](mailto:wendy.mo.ebisui@hawaii.gov)

Bonnie Kahakui 587-4702 [bonnie.a.kahakui@hawaii.gov](mailto:bonnie.a.kahakui@hawaii.gov)

Corinne Higa 587-4706 [corinne.y.higa@hawaii.gov](mailto:corinne.y.higa@hawaii.gov)

53

## State Procurement Office

*The end. Thanks for attending!*

*Remember to complete and email group attendance forms to  
[state.procurement.office@hawaii.gov](mailto:state.procurement.office@hawaii.gov)  
within 1 working day of the webinar.*

Questions?

<http://hawaii.gov/spo>

Click Hawaii eProcurement System (HePS)

HePS

- Mara Smith 587-4704  
[mara.smith@hawaii.gov](mailto:mara.smith@hawaii.gov)
- Bonnie Kahakui 587-4702  
[bonnie.a.kahakui@hawaii.gov](mailto:bonnie.a.kahakui@hawaii.gov)
- Wendy Ebsui 586-0563  
[wendy.mo.ebisui@hawaii.gov](mailto:wendy.mo.ebisui@hawaii.gov)

54