



Hawaii Statements of Qualifications (HISOQ) Portal HRS §103D-304

Training Guide

Overview

Business Objectives

→ To educate you on how to utilize this vendor portal to participate in the HRS 103D-304 program.

What to Expect

You will learn how to:

- Create an account
- Manage your company's users
- Submit, update, and review statements of qualifications

Key Improvements

- Enhanced user experience and user interface



User Account Management

Objectives

Learn how to manage your account and other users' accounts within your company using HISOQ.



Objective 1

Create account and register company



Objective 2

Invite users to company



Objective 4

Manage company's users

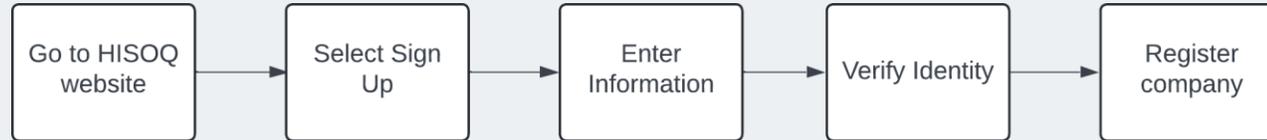


Objective 3

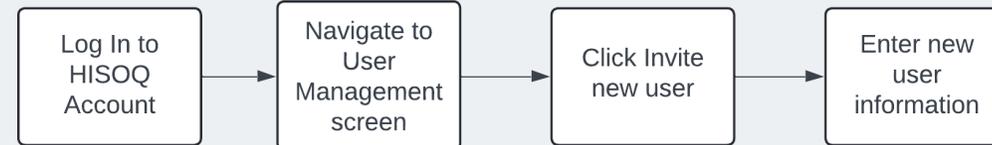
Update My Profile

Workflows

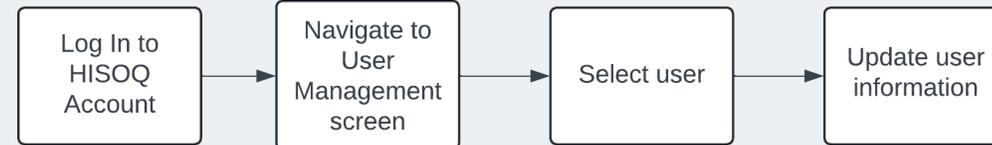
Create account and register company



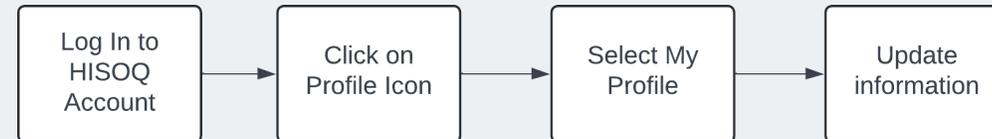
Invite users to company



Manage company's users



Update my profile





Create Account and Register Company

Objective 1

Create and Verify User Account

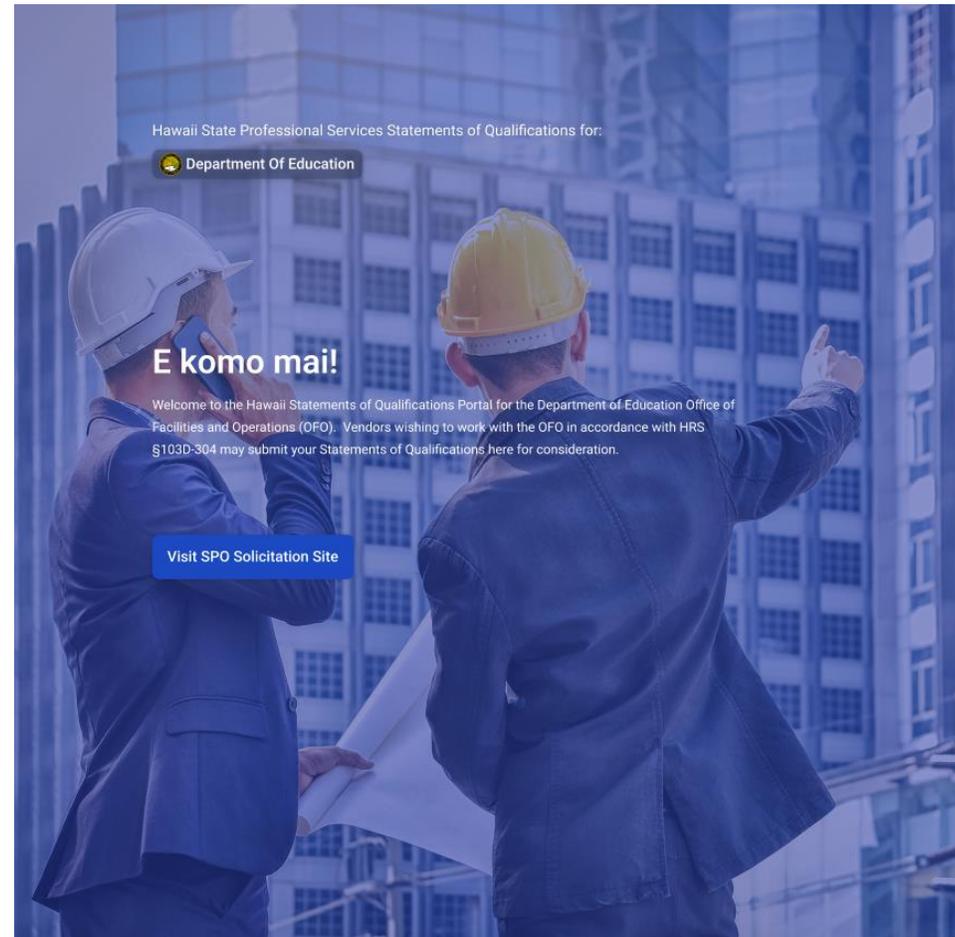


Step 1: Navigate to Sign Up and Create an Account

To **create an account**,

- Select Sign Up
- Enter required fields, marked with a red asterisk
- Click 'Continue'

This step is intended for new users or users not associated with a company. If this does not apply to you, please refer to step 3.



Sign Up

Sign up to get started.

First Name * **Last Name ***

0/50 0/50

Email Address *

Phone No. *

Password *

Your password must contain:

- At least 8 characters
- Lower case letters (a-z)
- Upper case letters (A-Z)
- Numbers (0-9)
- Special characters (e.g. !@#\$%^&*)

By creating an account, I agree to the [Terms and Conditions](#).

[Continue](#)

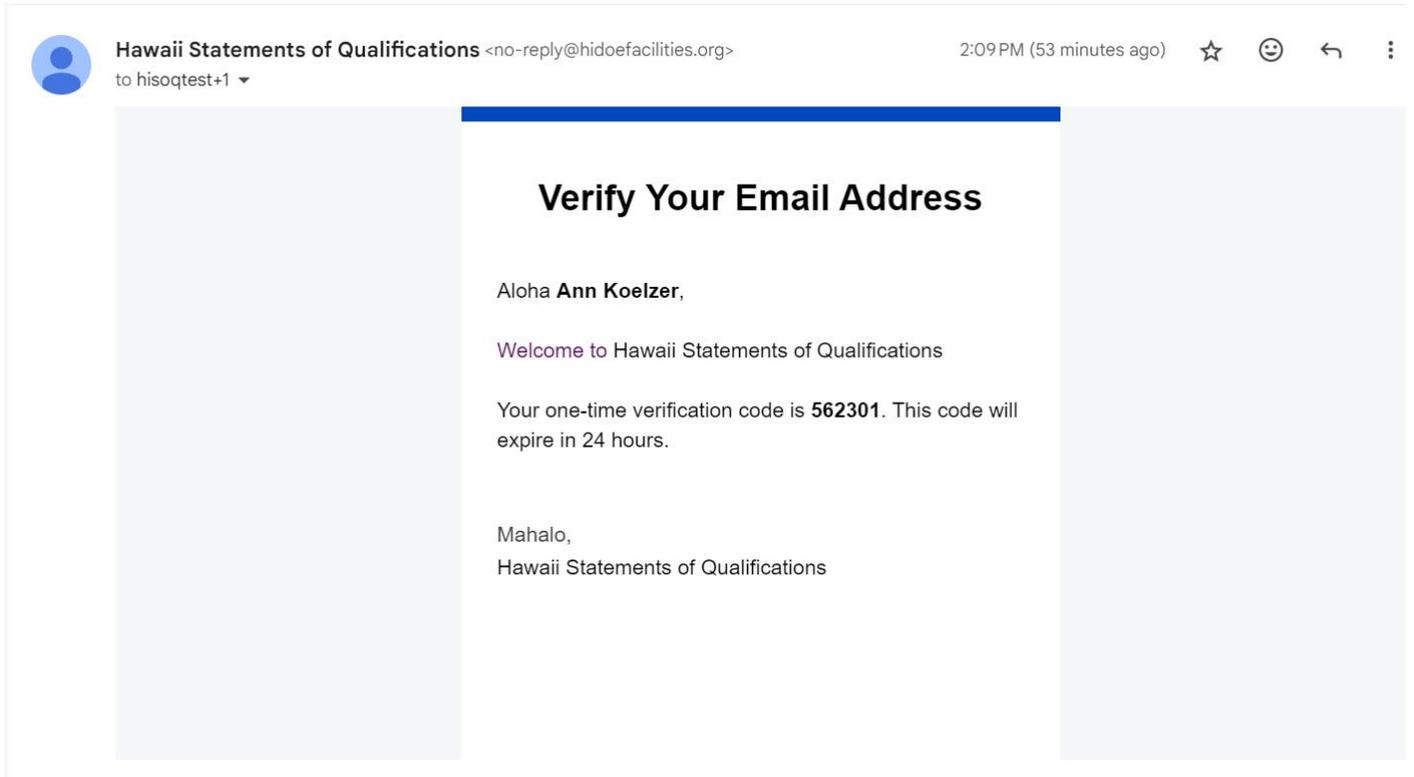
Already have an account? [Sign in](#)

Step 2: Verify Your Email Address

Next, verify your email address

- In your inbox, look for a message with the subject 'Verify Email Address – HISOQ'
- Enter the verification code in HISOQ
- Click 'Verify'

This step is intended for new users or users not associated with a company. If this does not apply to you, please refer to step 3.



Step 3: Sign In and Register Company

Now, sign in and register your company

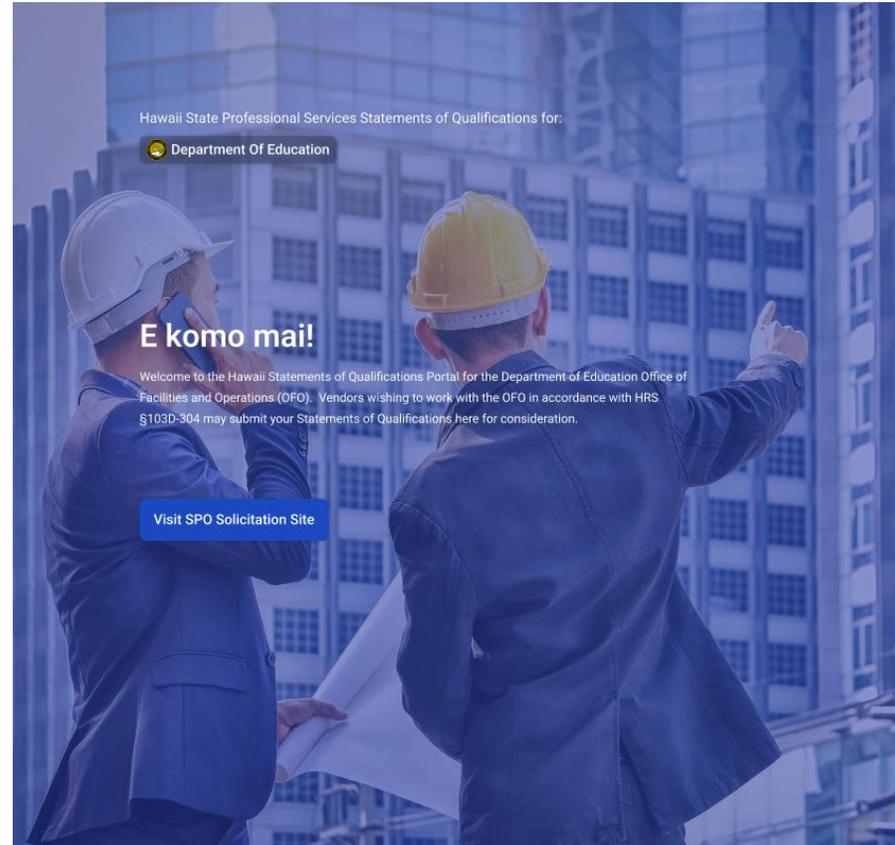
For existing users:

- Enter your username and password
- Click 'Sign In'

For new users or users not associated with a company:

- Enter your username and password
- Click 'Sign In'
- After sign in, you will see a Register Company screen
- Enter required information
- Click 'Register'

Your company is now registered.



Register Company

Enter your company's details to continue.

Firm Name *

Firm State *

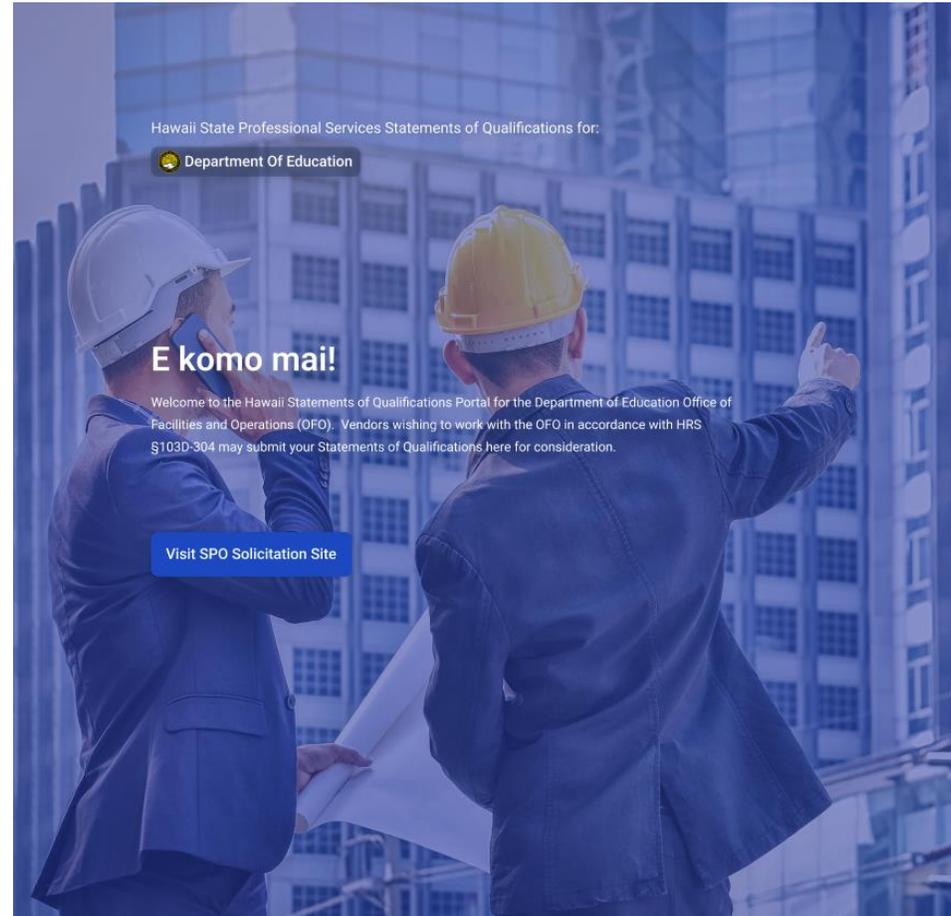
Hawaii EIN *

Forgot Password

If you forgot your password:

- On Sign In screen, select 'Forgot Password'
- Enter your email address
- Click 'Send Email'
- Navigate to your email, you will receive a password reset email
- Click 'Reset password' in the email body
- Enter your new password
- Confirm your new password
- Click 'Reset Password'

Your password is now updated.



Sign In

Please enter your credentials.

Email Address *
Enter Email Address

Password *
Enter Password [Forgot Password?](#)

[Sign In](#)

[Don't have an account? Sign up](#)



Invite Users to Company

Objective 2

User Management

Using the navigation side bar, select **User Management**

In this screen, you can:

- Invite new users to your company
- Resend email invite
- Set a primary contact
- View all users in your company
- Edit user information
- Deactivate user accounts

User Management

PS D23-0001 Professional Services - Educationally Related Professional Services

Vendor Submission Period: 04/01/2024 - 31/03/2025

Fiscal Year Period: 04/01/2024 - 31/03/2025

Primary Contact: Camrie Kubota

Primary Contact Email: camrie_kubota@datahouse.com

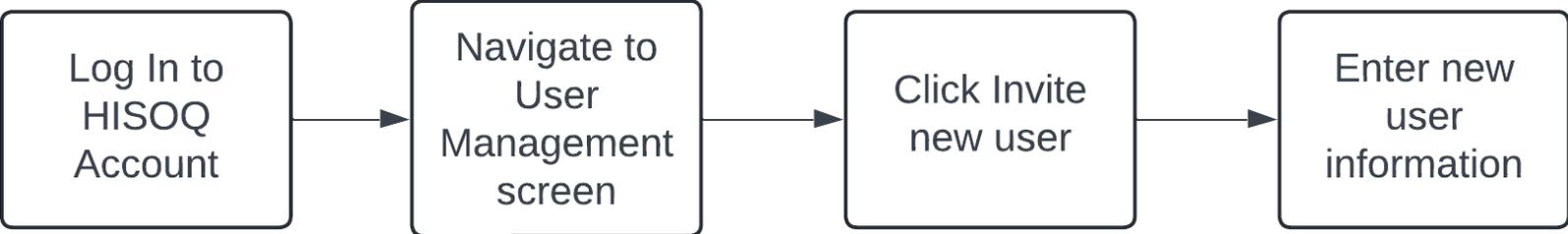
Search... Role Status Invite Accepted Invite Accepted Date + Invite new user

Name	Email	Role	Status	Invite Accepted	Invite Accepted Date	
Camrie Kubota Primary Contact	camrie_kubota@datahouse.com	USER	Active	Yes	05/29/2024	:
Ann Test Koelzer	annkoelzer@proton.me	USER	Pending	No	--	:
Ann Koelzer	ann_koelzer@datahouse.com	USER	Active	--	--	:

Showing 1-3 of 3 rows

Rows per page 10 < 1 >

Invite Users to Company



Invite New Users to Your Company

To **invite** new users to your company:

- Navigate to User Management
- Select 'Invite new user'
- Enter your required information marked with a red asterisk
- Click 'Invite User'

The user will receive an "Invitation to Join Company" email. Where they will be prompted to set up their account.

Invite a new user ✕

Enter the the user's name and email address to send an invite.

First Name *

Last Name *

Email Address *

Role *

[View role matrix](#) 

Resend Invitation Email to a User in your Company

To resend invitation email to a user in your company:

- Navigate to User Management
- Select the inline menu for the desired user
- Select 'Resend'

The user will receive an "Invitation to Join Company" email, where they will be prompted to set up their account.

The screenshot shows the 'User Management' interface for 'PS D23-0001 Professional Services - Educationally Related Professional Services'. It includes a sidebar with navigation icons, a top header with the user's name 'Ann Koelzer' and email 'ann_koelzer@datahouse.com', and a main content area with a table of users. The table has columns for Name, Email, Role, Status, Invite Accepted, and Invite Accepted Date. A dropdown menu is open for the first user, 'Ann Koelzer', showing options for 'Edit', 'Resend', and 'Delete'. The 'Resend' option is highlighted with a red box.

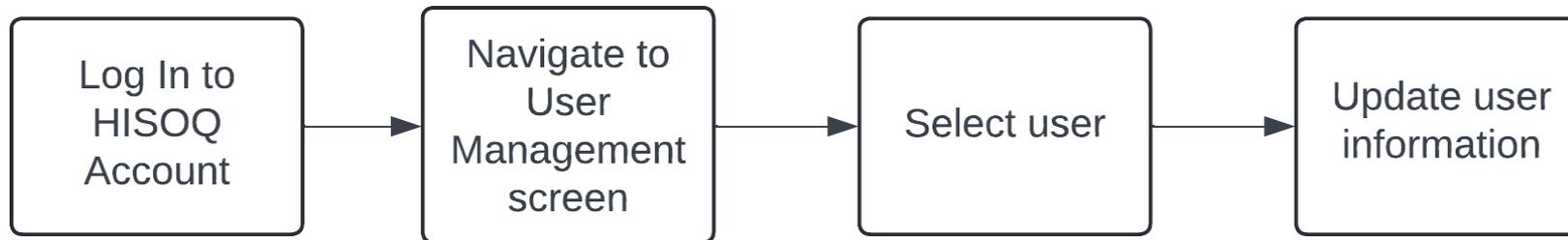
Name	Email	Role	Status	Invite Accepted	Invite Accepted Date
Ann Koelzer Primary Contact	ann_koelzer@datahouse.com	USER	Active	-	-
Ann Test Koelzer	annkoelzer@proton.me	USER	Pending	No	-
Camrie Kubota	camrie_kubota@datahouse.com	USER	Active	Yes	05/29/2024



Manage Company's Users

Objective 3

Manage Company's Users



Edit User Information

To edit a user in your company's information:

- Navigate to User Management
- Select the inline menu for the desired user
- Select 'Edit'
- Select any field and make the appropriate changes.
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

The screenshot displays the 'User Management' interface for 'PS D23-0001 Professional Services - Educationally Related Professional Services'. The background shows a table of users with columns for Name and Email. A modal window titled 'Edit user' is open, containing the following fields:

- First Name ***: Camrie
- Last Name ***: Kubota
- Email Address ***: camrie_kubota@datahouse.com
- Role ***: USER (dropdown menu)
- Invite Accepted ***: Yes
- Invite Accepted Date ***: 05/29/2024

At the bottom of the modal are 'Cancel' and 'Save' buttons. The background interface includes a search bar, a table with 3 rows, and a '+ Invite new user' button.

Set Primary Contact

The user designated as the Primary Contact will receive all company notifications.

To set a user as a Primary Contact:

- Navigate to User Management
- Select the inline menu for the desired user
- Select 'Set as Primary Contact'
- You will now see a Primary Contact tag next to the user's name

The screenshot shows the 'User Management' interface for 'PS D23-0001 Professional Services - Educationally Related Professional Services'. The interface includes a sidebar with navigation icons, a top header with the user's name 'Ann Koelzer' and email 'ann_koelzer@datahouse.com', and a main content area with summary cards for 'Vendor Submission Period', 'Fiscal Year Period', 'Primary Contact', and 'Primary Contact Email'. Below these is a table of users with columns for Name, Email, Role, Status, Invite Accepted, and Invite Accepted Date. The 'Ann Koelzer' user is highlighted with a 'Primary Contact' tag. An inline menu is open for this user, showing options: 'Edit', 'Set as Primary Contact' (highlighted with a red box), and 'Deactivate'. The table also shows 'Ann Test Koelzer' with a 'Pending' status and 'Camrie Kubota' with an 'Active' status.

Name	Email	Role	Status	Invite Accepted	Invite Accepted Date
Ann Koelzer Primary Contact	ann_koelzer@datahouse.com	USER	Active	--	--
Ann Test Koelzer	annkoelzer@proton.me	USER	Pending	No	--
Camrie Kubota	camrie_kubota@datahouse.com	USER	Active	Yes	05/29/2024

Deactivate a User in your Company

To deactivate a user in your company's information:

- Navigate to User Management
- Select the inline menu for the desired user
- Select 'Deactivate'
- A confirmation modal will appear, click 'Yes, deactivate' button

The screenshot shows the 'User Management' interface for 'PS D23-0001 Professional Services - Educationally Related Professional Services'. The interface includes a sidebar with navigation icons, a top navigation bar with the user's name 'Ann Koelzer' and email 'ann_koelzer@datahouse.com', and a main content area with filters and a table of users.

Filters: Vendor Submission Period (04/01/2024 - 31/03/2025), Fiscal Year Period (04/01/2024 - 31/03/2025), Primary Contact (Camrie Kubota), Primary Contact Email (camrie_kubota@datahouse.com).

Name	Email	Role	Status	Invite Accepted	Invite Accepted Date	
Camrie Kubota Primary Contact	camrie_kubota@datahouse.com	USER	Active	Yes	05/29/2024	⋮
Ann Test Koelzer	annkoelzer@proton.me	USER	Pending	No	--	⋮
Ann Koelzer	ann_koelzer@datahouse.com	USER	Active	--	--	⋮

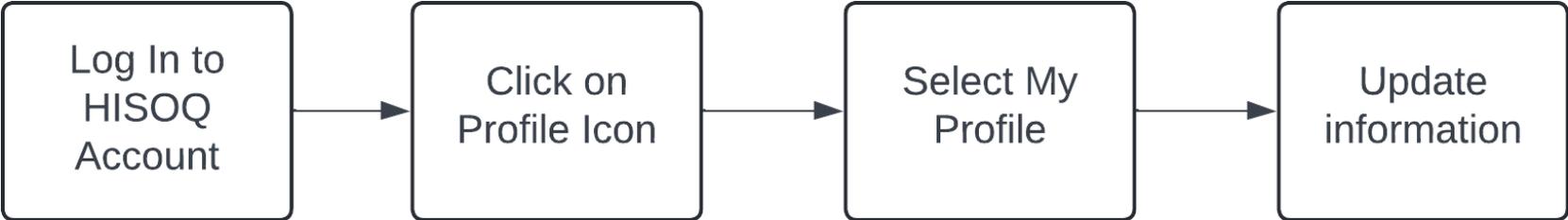
Showing 1-3 of 3 rows. Rows per page: 10. Context menu for the first row: Edit, Set as Primary Contact, Deactivate.



Update My Profile

Objective 4

Update My Profile



Manage Your Profile

In the top right corner, click your profile icon and select **My Profile**

Here, you can:

- Edit your first and last name
- Edit your phone number
- Update your password

To **edit** your profile:

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



Ann Koelzer Active

✉ hisoqtest@gmail.com

☎ +1 203 505 2277

Name

First Name *

Last Name *

Contact Information

Email Address *

Phone No. *

[Update password](#)

Update Your Password

To update your password:

- Navigate to My Profile
- Select 'Update Password'
- Enter your current password
- Click 'Verify'
- Enter your New Password and confirm your new password
- Your password is now updated

You will receive a "Password Updated" email. No action is required, it is only for your confirmation.

The screenshot shows a user profile for Ann Koelzer. The profile includes a circular avatar with the initials 'AK', the name 'Ann Koelzer' with a green 'Active' status, and contact information: email 'hisoqtest@gmail.com' and phone number '+1 203 505 2277'. Below the profile are two sections: 'Name' with input fields for 'First Name *' (containing 'Ann') and 'Last Name *' (containing 'Koelzer'); and 'Contact Information' with input fields for 'Email Address *' (containing 'hisoqtest@gmail.com') and 'Phone No. *' (containing '+1 203 505 2277'). A modal window titled 'Update Password' is open in the foreground, featuring a 'Current Password *' input field with a placeholder 'Enter Current Password' and a toggle icon. At the bottom of the modal are two buttons: 'Cancel' and 'Verify'.



Update Qualifications

Objectives

Learn how to update your company's Statements of Qualifications in HISOQ.



Objective 1

Update company information



Objective 2

Update discipline information



Objective 3

Update branch information



Objective 4

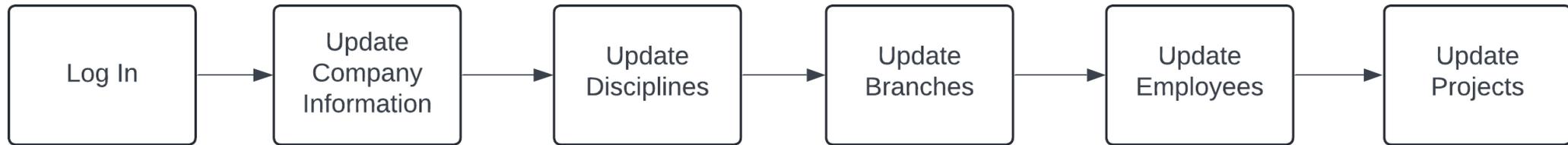
Update employee information



Objective 5

Update project information

Update Qualifications Workflow



Home Screen

Once you have successfully signed in, you will be navigated to the Home screen.

Here, you can:

- View current open selection periods
- Access a compilation of all submitted qualifications
- Review and submit your qualifications

The screenshot shows the user interface of the Hawaii Statements of Qualifications Portal. At the top right, the user is identified as Ann Koelzer (AK) with the email ann_koelzer@datahouse.com. The main heading is "Welcome back, Ann!" followed by the instruction "View, review, and submit qualifications all in one place." A light blue banner contains a help message: "Have questions about using HISOQ? Visit the help widget or watch our training video for guidance on site navigation and setting up your company." Below this, the "Opening Selection Period" section features a table with one row: Selection Period (07/01/2024 - 06/30/2025), Year (2025), Organization (DOE), and Deadline (03/30/2025 with 75 days left). A "Review & Submit" button is next to the deadline. The table footer shows "Showing 1-1 of 1 rows" and "Rows per page 10" with a page indicator "1". The "Your Submitted Qualifications" section has a table with one row: Selection Period (07/01/2024 - 06/30/2025), Year (2025), Organization (DOE), Submitter Name (Phuong Two), Title (QA), Email (phuong_vo+2@datahouse.com), and Submitted Date (12/24/2024). A "View" button is next to the submitted date. The footer also shows "Showing 1-1 of 1 rows" and "Rows per page 10" with a page indicator "1". A vertical navigation bar on the left contains icons for home, calendar, list, document, and user profile.

Hawaii Statements of Qualifications Portal

Welcome back, Ann!
View, review, and submit qualifications all in one place.

! Have questions about using HISOQ? Visit the help widget or watch our training video for guidance on site navigation and setting up your company.

Opening Selection Period

Selection Period ↑	Year ↑↓	Organization ↑↓	Deadline ↑↓	Action
07/01/2024 - 06/30/2025	2025	DOE	03/30/2025 (75 days left)	Review & Submit

Showing 1-1 of 1 rows

Rows per page 10 < 1 >

Your Submitted Qualifications

Selection Period ↓	Year ↑↓	Organization ↑↓	Submitter Name ↑↓	Title ↑↓	Email ↑↓	Submitted Date ↑↓	Action
07/01/2024 - 06/30/2025	2025	DOE	Phuong Two	QA	phuong_vo+2@datahouse.com	12/24/2024	View

Showing 1-1 of 1 rows

Rows per page 10 < 1 >



Update Company Information

Objective 1

Step 1: Navigate to Company Information Screen

To navigate to the Company Information screen, use the navigation bar and select Company Information.

PS D23-0001 Professional Services - Educationally Related Professional Services

[General Information](#) [Insurance & Required Documents](#) [Project Information](#)

Company Name * DataHouse Consulting, Inc. **Hawaii EIN *** 99-1234567 **Company Type *** Select a Company Type **Year Company Established *** 2024

State Company Established * Hawaii **Phone No. *** +1 808 942 8108 **Fax No.** +1 808 948 9595 **Person in Charge *** Ann Koelzer

Years Established in Hawaii * 50

Personnel
Enter the number of personnel with and without Hawaii licenses in your company.

Personnel with Hawaii Licenses * 352 **Personnel without Hawaii Licenses *** 5

Address

Address Line 1 * 711 Kapiolani Blvd **Address Line 2** Ste. 500

City * Honolulu **State *** Hawaii **Zip Code *** 96813

Cancel Save

Step 2: Update General Information

In the General Information tab, you can update your company's details.

To edit:

- Navigate to the General Information tab
- Select any field and make the appropriate changes
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

Company Information

PS D23-0001 Professional Services - Educationally Related Professional Services

General Information Insurance & Required Documents Project Information

Company Name DataHouse Consulting, Inc. **Hawaii EIN *** 12-8845333 **Company Type *** Enter Company Type **Year Company Established *** 2000

State Company Established * Select State Company Established **Phone No. *** +1 **Fax No.** +1 **Person in Charge *** Enter Person in Charge

Years Established in Hawaii * Enter Years Established in Hawaii

Personnel

Enter the number of personnel with and without Hawaii licenses in your company.

Personnel with Hawaii Licenses * Enter Personnel with Hawaii Licenses **Personnel without Hawaii Licenses *** Enter Personnel without Hawaii Licenses

Address

Address Line 1 * Enter Address Line 1 **Address Line 2** Enter Address Line 2

City * Enter City **State *** Hawaii **Zip Code *** Enter Zip Code

Cancel Save

Step 3: Update Insurance & Required Documents

In the Insurance & Required Documents tab, you can enter insurance and legal information related to your company.

To edit:

- Navigate to the Insurance & Required Documents tab
- Select any field and make the appropriate changes
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

Company Types other than 'Individual', require a Certificate of Good standing OR Certificate of Vendor Compliance.

Checking 'Company has E&O Insurance' requires a Proof of Insurance document, Amount of Coverage per Claim, and Amount of Deductible.

Company Information

PS D23-0001 Professional Services - Educationally Related Professional Services

General Information **Insurance & Required Documents** Project Information

Company is bonded Company has E&O Insurance

Summarize litigation history the past 5 years

Enter Summarize litigation history the past 5 years 0/5000

Proof of Insurance

Show proof of insurance with amounts of coverage and deductible.

Amount of Coverage Per Claim Amount of Deductible

Enter Amount of Covera Enter Amount of Deduct

Company Insurance Documents

List of all uploaded company documents. Please make sure your company name is in your filename.

Search... Selection Year Document Type Upload file

<input type="checkbox"/>	Selection Year ↓	Document Type ↑↓	Document Name ↑↓	Upload Date ↑↓	Updated By ↑↓
No records to display					

Cancel Save

Step 4: Upload Company Insurance Documents

You can also upload Company Insurance Documents in the Insurance & Required Documents tab.

To upload Company Insurance Documents:

- Select 'Upload File' button
- Select your Document Type and upload the file
- Click 'Upload'

The new document will display in the listing.

The screenshot displays the 'Company Information' page for 'PS D23-0001 Professional Services - Educationally Related Professional Services'. The 'Insurance & Required Documents' tab is active. A modal window titled 'Upload file' is open, prompting the user to select a document type and upload a file. The modal includes a text area for the current selection year, a dropdown for document type, and a file upload area with a 'Drop file here or select file' prompt. The background shows the 'Company Insurance Documents' listing table with columns for Selection Year, Document Type, Document Name, Upload Date, and Updated By.

Step 5: Update Project Information

In the Project Information tab, you can update your company's project information.

To edit:

- Navigate to the Project Information tab
- Select any field and make the appropriate changes
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

Company Information AK Ann Koelzer
hisqtest@gmail.com

PS D23-0001 Professional Services - Educationally Related Professional Services

General Information Insurance & Required Documents **Project Information**

Explain firm's project assignment *
 0/5000

Explain firm's project management structure *
 0/5000

Explain firm's project workflow *
 0/5000

Explain firm's quality control process *
 0/5000

Summary

A summary of your firm's completed and present projects during the last 10 years.

As a Prime A/E Consultant

Total No. of Completed Projects *	Total No. of Present Projects *	Total Est. Constr. Cost of Completed Projects *	Total Est. Constr. Cost of Present Projects *
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

Step 6: Create New Project Type

You can also create a Class of Work and Project Type Specialization in the Project Information tab.

To create Project Type Specializations:

- Select 'Create new project type'
- Enter required information, marked with a red asterisk
- Click 'Add'

The new project type will display in the listing.

The screenshot displays the 'Company Information' page for 'PS D23-0001 Professional Services - Educationally Related Professional Services'. The 'Project Information' tab is active. A modal dialog box titled 'Create new project type' is open, allowing the user to enter details for a new project type. The dialog box includes the following fields:

- Project Year:** 2024
- Project Type:** Select a Project Type
- No. of Completed Projects:** 0
- Total Est. Construction Cost:** \$ 0.00
- Total Est. Project Size (G.S.F.):** 0

Buttons for 'Cancel' and 'Add' are located at the bottom of the dialog box. The background interface shows a table with columns for 'Project Year' and 'Project Type', and a '+ Create new project type' button.



Update Discipline Information

Objective 2

Step 1: Navigate to the Disciplines screen

To navigate to the Disciplines screen, use the navigation bar and select Disciplines.

Here, you can:

- Create disciplines
- Edit disciplines
- Delete disciplines

Disciplines AK Annie Koelzer ann_koelzer@datahouse.com

PS D23-0001 Professional Services - Educationally Related Professional Services

Search... Discipline + Create new discipline

<input type="checkbox"/>	Discipline ↑↓	Associates ↑↓	Created By ↑↓	Created Date
<input type="checkbox"/>	Construction Management	Annie Koelzer	Annie Koelzer	06/01/2023
<input type="checkbox"/>	Community Planning	Annie Koelzer	Annie Koelzer	05/22/2023
<input type="checkbox"/>	Engineering Planning & Design - Civil - General	Annie Koelzer	Annie Koelzer	05/22/2023
<input type="checkbox"/>	Construction Management	Annie Koelzer	Annie Koelzer	05/22/2023
<input type="checkbox"/>	Community Planning	Annie Koelzer	Annie Koelzer	05/22/2023

Showing 1-5 of 5 rows Rows per page 10 1

Step 2: Create New Discipline

To **create** a new discipline,

- Navigate to the Disciplines screen
- Select 'Create new discipline'
- Enter required information, marked with a red asterisk
- Click 'Add'

The new discipline will display in the listing

The screenshot shows the 'Disciplines' management interface. At the top, the page title is 'Disciplines' and the user is identified as 'Ann Koelzer' with the email 'hisqtest@gmail.com'. Below the title, the breadcrumb path is 'PS D23-0001 Professional Services - Educationally Related Professional Services'. A search bar is present, and a '+ Create new discipline' button is visible in the top right. A modal window titled 'Create new discipline' is open in the center, containing the following fields:

- A text input field with a note: 'Please make sure your company name is in your filename.'
- A required dropdown field labeled 'Discipline *' with the placeholder 'Select Discipline'.
- A required dropdown field labeled 'Associates *' with the placeholder 'Enter name of firm or individual(s)'.
- An 'Upload File(s)' section with a dashed border and a link: 'Drop files here or select files'.
- 'Cancel' and 'Add' buttons at the bottom.

The background shows a table with columns: Discipline, Associates, Created By, Created Date, Updated By, and Updated Date. The table is currently empty.

Delete Disciplines

To **delete** a discipline:

- Select the inline menu of the discipline
- Select 'Delete'
- To delete, click the 'Yes, delete' button
- To cancel, click the 'No, keep record' button

Disciplines

PS D23-0001 Professional Services - Educationally Related Professional Services

Search... Discipline + Create new discipline

<input type="checkbox"/>	Discipline	Associates	Created By	Created Date	Updated By	Updated Date	
<input type="checkbox"/>	Energy Performance Engineering	Samantha Drake	Ann Koelzer	06/06/2024	Ann Koelzer	06/06/2024	:
<input type="checkbox"/>	Construction Management	Designers, Inc.	Ann Koelzer	06/06/2024	Ann Koelzer	06/06/2024	Edit Delete
<input type="checkbox"/>	Community Planning	Ann Koelzer, John Doe	Ann Koelzer	06/06/2024	Ann Koelzer	06/06/2024	:

Showing 1-3 of 3 rows

Rows per page 10 < 1 >

Edit Disciplines

To **edit** a discipline:

- Select the inline menu of the discipline
- Select 'Edit'
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

Disciplines / Construction Management / Edit

AK Ann Koelzer
hisoqtest+1@gmail.com

Construction Management

Edit discipline details.

Discipline *
Construction Management

Associates *
Designers, Inc. x

Upload File(s)
Drop files here or select files

Cancel Save



Update Branch Information

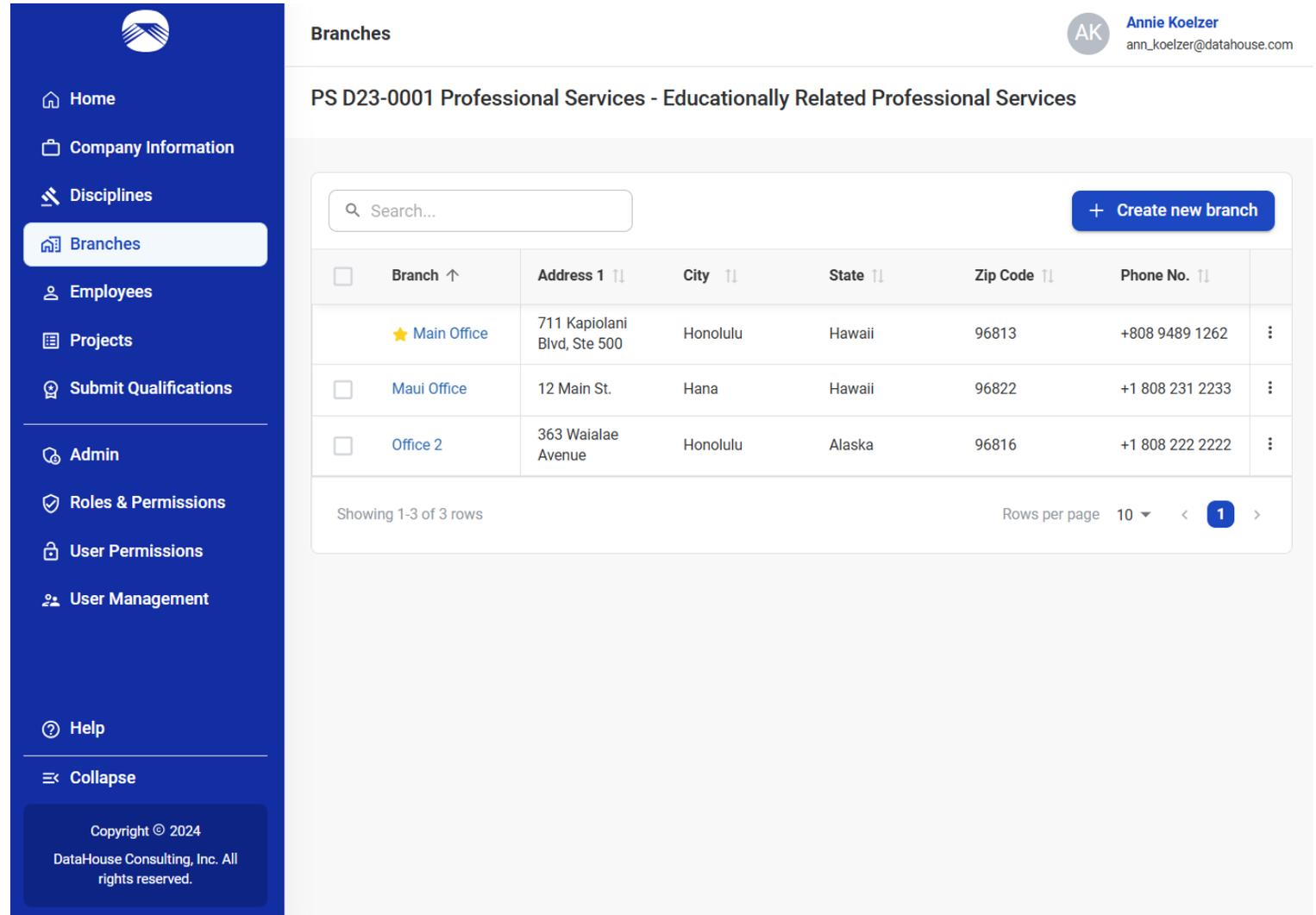
Objective 3

Step 1: Navigate to the Branches screen

To navigate to the Branches screen, use the navigation bar and select Branches.

Here, you can

- Edit branches
- Delete branches
- Create branches



Branches

PS D23-0001 Professional Services - Educationally Related Professional Services

Search... [+ Create new branch](#)

<input type="checkbox"/>	Branch ↑	Address 1 ↑↓	City ↑↓	State ↑↓	Zip Code ↑↓	Phone No. ↑↓	
<input checked="" type="checkbox"/>	★ Main Office	711 Kapiolani Blvd, Ste 500	Honolulu	Hawaii	96813	+808 9489 1262	⋮
<input type="checkbox"/>	Maui Office	12 Main St.	Hana	Hawaii	96822	+1 808 231 2233	⋮
<input type="checkbox"/>	Office 2	363 Waiialae Avenue	Honolulu	Alaska	96816	+1 808 222 2222	⋮

Showing 1-3 of 3 rows Rows per page 10 < 1 >

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Step 2: Create New Branch

To **create** a branch,

- Navigate to the Branches screen
- Select 'Create new branch'
- Enter required information
- Click 'Add'

The new branch will be displayed in the listing.

Branches / Create new branch

Ann Koelzer
hisoqtest@gmail.com

Create new branch

Enter the required fields and click Add to create an branch.

Branch Name *
Enter Branch Name

Person in Charge *
Enter Name

Address Line 1 * Street address, P.O. box, company name
Address Line 2 * Apartment, suite, unit, building, floor, etc.

City * Enter City
State * Select a State
Zip Code * XXXXX

Phone No. * +1
Fax No. * +1

Engineers
Enter the number of engineers in your branch.

Mechanical * 0
Electrical * 0
Civil * 0
Other * 0

Other Personnel

Cancel Add

Delete Branches

To **delete** a branch:

- Select the inline menu
- Select 'Delete'
- To delete, click the 'Yes, delete' button
- To cancel, click the 'No, keep record' button

A branch cannot be deleted with an employee associated to it.

To **delete** a branch with an employee:

- Navigate to the Employees screen
- Select the inline menu of employees under the branch you want to delete
- Click 'Edit'
- Add the employee to a different branch or delete the employee

You can now delete the branch.

Branches

PS D23-0001 Professional Services - Educationally Related Professional Services

Search... [+ Create new branch](#)

<input type="checkbox"/>	Branch ↑	Address 1 ↑↓	City ↑↓	State ↑↓	Zip Code ↑↓	Phone No. ↑↓	
<input checked="" type="checkbox"/>	★ Main Office	12 Main St.	Honolulu	Hawaii	96814	+1 203 444 4444	⋮
<input type="checkbox"/>	Maui Branch	144 South St.	Hana	Hawaii	96612	+1 808 443 1234	⋮

Showing 1-2 of 2 rows

Rows per page 10 < 1 **Delete**

Edit Branches

To **edit** a branch:

- Select the inline menu
- Select 'Edit'
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

Main Office branch is automatically created based on address information entered in 'General Information'.

To **edit** the Main Office branch:

- Select the inline menu
- Select 'Edit'
- Select the hyperlink *Edit Address Information in Company Information Section*
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

The screenshot shows the 'Edit Branches' interface for the 'Main Office' branch. The breadcrumb navigation is 'Branches / Main Office'. The user is identified as 'Ann Koelzer' with email 'hisotqtest+1@gmail.com'. The main heading is 'Main Office' with a star icon, and the sub-heading is 'Edit main office details.' The form contains the following fields:

- Branch Name ***: Main Office
- Person in Charge ***: John Chung
- Address Line 1 ***: 12 Main St.
- Address Line 2**: Apartment, suite, unit, building, floor, etc.
- City ***: Honolulu
- State ***: Hawaii
- Zip Code ***: 96814
- Phone No. ***: +1 203 444 4444
- Fax No.**: +1

Below the address fields is a link: [Edit Address Information in Company Information Section](#). At the bottom of the form is the 'Engineers' section, which asks to 'Enter the number of engineers in your branch.' and includes four input fields: Mechanical * (0), Electrical * (0), Civil * (0), and Other * (0). At the bottom right of the page are 'Cancel' and 'Save' buttons.



Update Employee Information

Objective 4

Step 1: Navigate to the Employees screen

To navigate to the Employees screen, use the navigation bar and select Employees.

Here, you can

- Edit employees
- Delete employees
- Create employees

Employees AK Annie Koelzer ann_koelzer@datahouse.com

PS D23-0001 Professional Services - Educationally Related Professional Services

Search... Status Level Type + Create new employee

<input type="checkbox"/>	Employee Bra... ↓	Name ↑↓	Status ↑↓	Resident ... ↑↓	Job Title ↑↓	Level ↑↓	Type ↑↓	
<input type="checkbox"/>	▼ ★ Main Office							
<input type="checkbox"/>		Ann Koelzer	Full Time	Hawaii	Business Analyst	Principal	Architect	⋮
<input type="checkbox"/>	> Maui Office							

Showing 1-2 of 2 rows Rows per page 10 < 1 >

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Step 2: Create New Employee

Here you can update your company's employee information.

To **create** a new employee:

- Navigate to the Employees screen
- Select 'Create new employee'
- Enter required information
- Click 'Add'

Employees with Level: '1 – Principal' and '2 – Associate', require all tabs (Education, Membership, Licensure, and History) to be filled out.

To **save as draft**:

- Select 'Create new employee'
- Enter information
- Click 'Save as draft'
- To access this draft, select 'Create new employee'
- Select 'Load Draft'.

Employees / Create new employee

Create new employee
Enter the required fields and click Add to create an employee.

General Information Education Membership Licensure History

Employee Branch * First Name * Last Name * Resident of *
Select Employee Branch Enter First Name Enter Last Name Select State

Job Title * Level * Type * Status *
Enter Job Title Select Level Select Type Select Status

Experience

Total years of experience * Years of experience with this firm *
0 0

Name of last firm
Enter name of last firm

Years of experience with last firm Years of experience with other firms
0 0

Years of experience as principal in this firm Years of experience as principal in other firms
0 0

Years of experience as other than principal
0

Cancel Save as draft Add

Edit Employee

To **edit** an employee:

- Select the inline menu
- Select 'Edit'
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

Employees / John Dott

Ann Koelzer
hisoqtest+1@gmail.com

John Dott

Edit employee details.

[General Information](#) Education Membership Licensure History

Employee Branch *	First Name *	Last Name *	Resident of *
Main Office	John	Dott	Hawaii
Job Title *	Level *	Type *	Status *
Project Manager	3 - Technical	1 - Architect	Full Time

Experience

Total years of experience *	Years of experience with this firm *
12	1
Name of last firm	
Enter name of last firm	
Years of experience with last firm	Years of experience with other firms
0	0
Years of experience as principal in this firm	Years of experience as principal in other firms
0	0
Years of experience as other than principal	
0	

Cancel Save

Delete Employee

To **delete** an employee:

- Select the inline menu
- Select 'Delete'
- To delete, click the 'Yes, delete' button
- To cancel, click the 'No, keep record' button

Employees AK Ann Koelzer hisoqtest+1@gmail.com

PS D23-0001 Professional Services - Educationally Related Professional Services

Search... Status Level Type + Create new employee

<input type="checkbox"/>	Employee Branch ↓	Name ↑↓	Status ↑↓	Resident of ↑↓	Job Title ↑↓	Level ↑↓	Type ↑↓	
<input type="checkbox"/>	> ★ Main Office							
<input type="checkbox"/>	▼ Maui Branch							
<input type="checkbox"/>		Samanatha Chase	Full Time	Hawaii	Architect	Technical	Architect	⋮

Showing 1-2 of 2 rows Rows per page 10 < 1

Edit
Delete



Update Project Information

Objective 5

Step 1: Navigate to the Projects screen

To navigate to the Projects screen, use the navigation bar and select Projects.

Here, you can

- Edit projects
- Delete projects
- Create projects

Projects

AK Annie Koelzer
ann_koelzer@datahouse.com

PS D23-0001 Professional Services - Educationally Related Professional Services

All Projects
List a maximum of 10 projects for each type of work being applied for. List projects that reflect your ability to provide quality work for your requested projects.

Search... Role Project Type + Create new project

<input type="checkbox"/>	Project Name ↑	Owner Name ↑↓	Role ↑↓	Project Type ↑↓	Year ↑↓	
<input type="checkbox"/>	Consulting	Thao Nguyen	Associate	Archaeology	2020	
<input type="checkbox"/>	Tets	Ky Pham	Associate	Architectural Planning and Design	2019	

Showing 1-2 of 2 rows Rows per page 10 < 1 >

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Step 2: Create New Project

To **create** a new project,

- Navigate to the Projects screen
- Select 'Create new project'
- Enter required information, marked with a red asterisk
- Click 'Add'

The new project is displayed in the listing.

Projects / Create

AK Ann Koelzer
hisoqtest@gmail.com

Create new project

Enter the required fields and click Add to create a project.

Project Information
Enter the project's details.

Project Year * **Project Name ***

Role * **Project Type ***

Project Description *
 0 / 5000

Design Duration (Months) * **% Design Completed *** **% Construction Completed *** **Total Est. Construction Cost ***

Time Frame *

Address
Enter the address of where the project took place.

Address Line 1 * **Address Line 2**

Edit Project

To **edit** a project:

- Select the inline menu
- Select 'Edit'
- To save, click the 'Save' button
- To cancel, click the 'Cancel' button

The screenshot shows the 'Projects' page in the DataHouse application. At the top right, the user 'Annie Koelzer' (AK) is logged in. The page title is 'PS D23-0001 Professional Services - Educationally Related Professional Services'. Below this, there is a section for 'All Projects' with a search bar and filters for 'Role' and 'Project Type'. A table lists two projects:

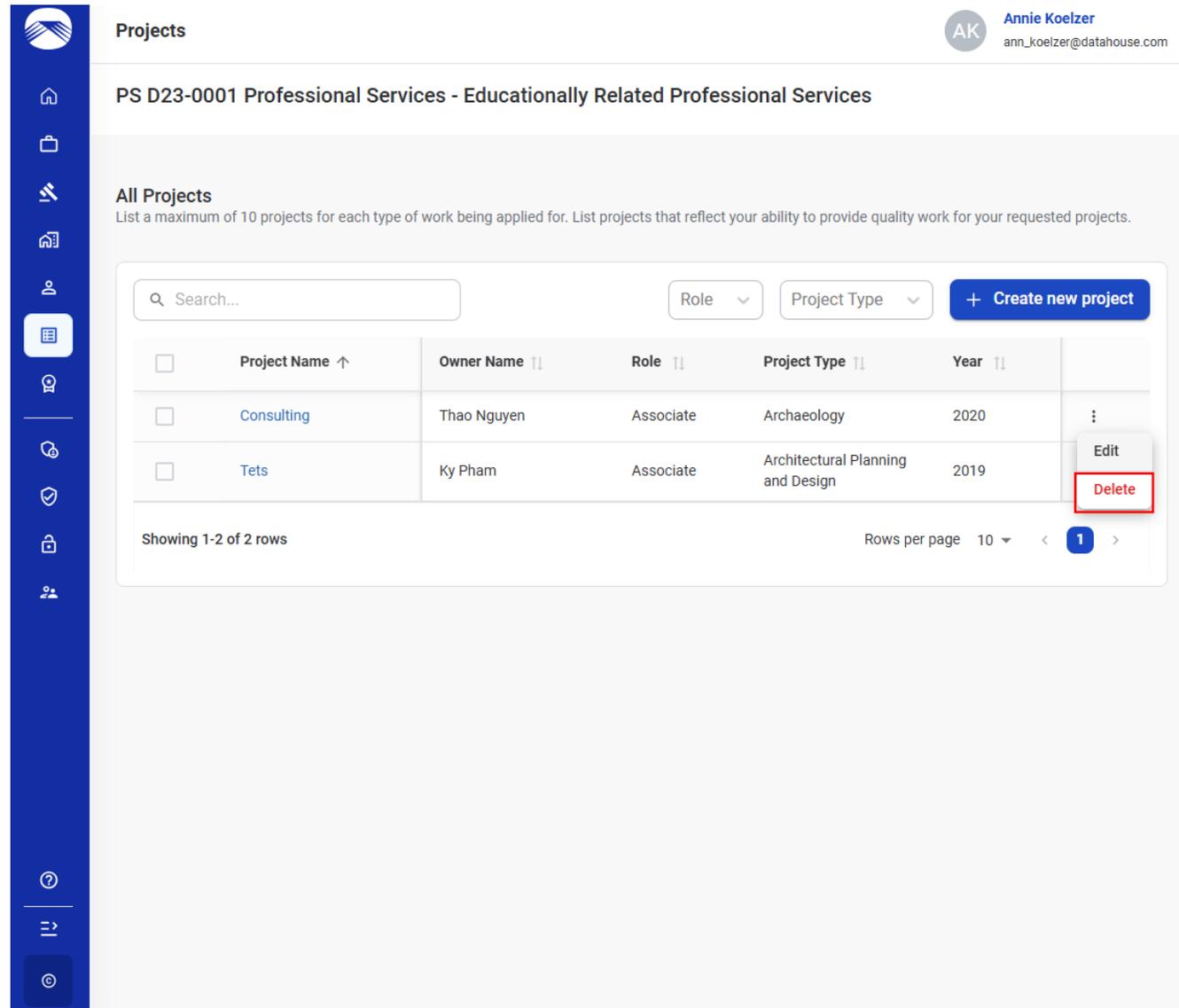
<input type="checkbox"/>	Project Name ↑	Owner Name ↑↓	Role ↑↓	Project Type ↑↓	Year ↑↓	
<input type="checkbox"/>	Consulting	Thao Nguyen	Associate	Archaeology	2020	⋮ Edit Delete
<input type="checkbox"/>	Tets	Ky Pham	Associate	Architectural Planning and Design	2019	

At the bottom of the table, it says 'Showing 1-2 of 2 rows' and 'Rows per page 10'. The 'Edit' button in the table is highlighted with a red box.

Delete Project

To **delete** a project:

- Select the inline menu
- Select “Delete”
- To delete, click the “Yes, delete” button
- To cancel, click the “No, keep record” button



The screenshot shows the DataHouse interface for managing projects. At the top, the user is identified as Annie Koelzer (AK) with the email ann_koelzer@datahouse.com. The main heading is "Projects" and the specific project being viewed is "PS D23-0001 Professional Services - Educationally Related Professional Services".

Below the heading, there is a section titled "All Projects" with a sub-heading "List a maximum of 10 projects for each type of work being applied for. List projects that reflect your ability to provide quality work for your requested projects." This section contains a search bar, filters for "Role" and "Project Type", and a "+ Create new project" button.

The main content is a table with the following data:

<input type="checkbox"/>	Project Name ↑	Owner Name ↑↓	Role ↑↓	Project Type ↑↓	Year ↑↓	
<input type="checkbox"/>	Consulting	Thao Nguyen	Associate	Archaeology	2020	⋮ Edit
<input type="checkbox"/>	Tets	Ky Pham	Associate	Architectural Planning and Design	2019	Delete

At the bottom of the table, it says "Showing 1-2 of 2 rows" and "Rows per page 10" with a page indicator "1".



Review & Submit Qualifications

Objectives

Learn how to review and submit your company's Statements of Qualifications for consideration in HISOQ.



Objective 1

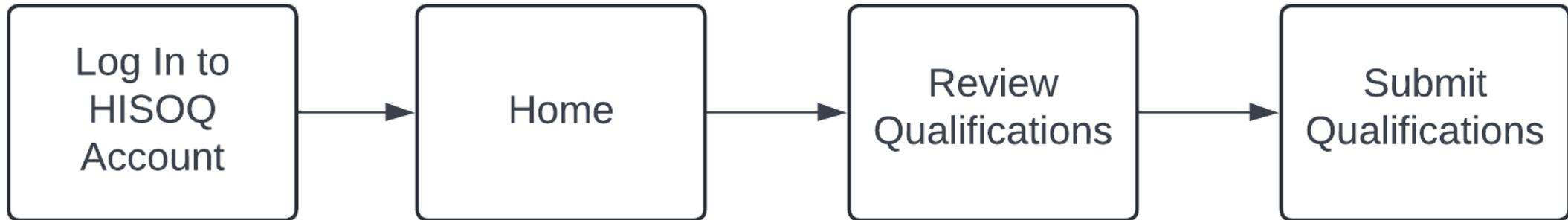
Review Qualifications



Objective 2

Submit Qualifications

Review and Submit Qualifications





Review Qualifications

Objective 1

Step 1: Navigate to Qualifications

To **navigate** to your company's qualifications for the current selection period,

→ Navigate to Home Screen

→ Select 'Review & Submit' button

Hawaii Statements of Qualifications Portal

Welcome back, Ann!
View, review, and submit qualifications all in one place.

Opening Selection Period

Selection Period ↑	Year	Organization	Deadline	Action
06/30/2023 - 06/29/2024	2024	DOE	05/30/2024	Review & Submit
06/30/2023 - 06/29/2024	2024	SFA	05/30/2024	Review & Submit

Showing 1-2 of 2 rows

Rows per page 10 < 1 >

Your Submitted Qualifications

Selection Period ↓	Year	Organization	Submitter Name	Title	Email	Submitted Date	Action
06/30/2023 - 06/29/2024	2024	DOE	Ann Koelzer	Business Analyst	ann_koelzer@datahouse.com	05/28/2024	View

Showing 1-1 of 1 rows

Rows per page 10 < 1 >

Step 2: Review Qualifications

To **review** your company's qualifications for the current selection period,

- View qualifications, missing information will be highlighted in red
- To update the missing information, select 'Go to page' button
- Update all missing information
- Click 'Save'.

You can now submit your qualifications.

Home / Submit Qualifications

Ann Koelzer
ann_koelzer@datahouse.com

Submit to Organization *
DOE

PS D23-0001 Professional Services - Educationally Related Professional Services
Selection period: 01/07/2023 - 30/06/2024

Carefully review all provided information prior to submission.

General Information [Go to page](#)

Company Name Ann Test	Hawaii EIN 11-1111332	Company Type Corporation	Year Company Established 1999	State Company Established Hawaii
Phone No. +808 9489 1262	Fax No. +808 1111 1111	Person in Charge Ann Koelzer	Years Established in Hawaii 20	

Personnel

Personnel with Hawaii Licenses 1	Personnel without Hawaii Licenses 1
-------------------------------------	--

Address

Address Line 1 711 Kapiolani Blvd, Ste 500	Address Line 2 apt 12	City Honolulu	State Hawaii	Zip Code 96813
---	--------------------------	------------------	-----------------	-------------------

Insurance & Required Documents Missing Certificate of Good Standing [Go to page](#)

Company is bonded Company has E&O Insurance

Summarize litigation history the past 5 years
--

Proof of Insurance

Amount of Coverage Per Claim Amount Deductible

[Cancel](#) [Submit](#)



Submit Qualifications

Objective 2

Step 3: Submit Qualifications

To **submit** your company's qualifications for the current selection period,

→ Click 'Submit'

→ Enter your Position Title you wish to submit to

→ Click 'Submit'

The screenshot displays a web application interface for submitting qualifications. The main page is titled "PS D23-0001 Professional Services - Educationally Related Professional Services" with a selection period of "01/07/2023 - 30/06/2024". A "Submit to Organization" dropdown menu is set to "DOE". A "Confirm submission" dialog box is overlaid on the page, containing the following fields and text:

- Position Title ***: A text input field with the placeholder "Enter Position Title".
- Submit to Organization ***: A dropdown menu currently showing "DOE".
- Text: "Once submitted, you will have to re-submit these qualifications for any future changes. Are you sure you want to submit?"
- Buttons: "Back to Review" and "Submit".

The background page shows sections for "General Information" (Company Name, Phone No., Address) and "Insurance & Required Documents" (checkboxes for "Company is bonded" and "Company has E&O Insurance").

Recap

After completing this training, you are now able to:

- Create an account and register company.
- Manage users in your company.
- Manage your profile.
- Update your company's qualifications.
- Review and Submit your company's qualifications.

Now, you're ready to **submit your statements of qualifications!**

Mahalo

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