

State Procurement Office

SPO Website and Reporting Systems Overview

SPO Workshop 140

An overview of the SPO Website and the
various reporting systems.

What Will be Covered

- In General
 - Why we post all the information.
 - General organization of the SPO website.
 - Where to find information.
 - Brief overview of agency reporting requirements.
- Specific Systems
 - Procurement Notices
 - Procurement Reporting System
 - Professional Services
 - Hawaii eProcurement System (HePS)
 - Hawaii Compliance Express
- Planned Changes
- Q & A

Note:

- This workshop does not cover everything required on the various reporting systems. Please refer to the:
 - Hawaii Revised Statutes (HRS)
 - Hawaii Administrative Rules (HAR);
 - Procurement Circulars;
 - Manuals/Handbooks; and
 - Other workshops, as appropriate.

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)

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**.

General Organization of the Website

- There will usually be more than one way to get to information.
- Goal : make information easier to find
- Two points of view:
 1. State and County Procurement Personnel
 2. Vendors, Contractors and Service Providers

Sites Requiring A Login/password

- **For Solicitations:**
 - Procurement Notices* (HRS 103D and 103F)
 - RFP Website** (HRS 103F)
 - Professional Services* (HRS 103D)
 - **For Awards**
 - Procurement Reporting System ** (HRS 103D)
 - Contracts Database Reporting System** (HRS 103D)
 - **Hawaii Compliance Express**
 - **Questions?**
 - HRS 103D Wendy Orita (and any HCE questions)
 - HRS 103F Corinne Higa (and training questions)
- Note: ** *RFPW, PRS and CDRS may use same login/password,*
* *PNS, Professional Services may use same login/password*

Sites Requiring Login/Password (continued)

- **Hawaii eProcurement System**
 - In order to have access, the following is required:
 - Delegated Authority (Form SPO 36F)
 - Taken all required workshops
 - Access is given by your **department HePS system administrator**, not SPO.
 - Questions about HePS?
 - **Mara Smith**
 - **Wendy Orita**
 - **Bonnie Kahakui**

Sites Requiring a Login/Password Additional Info

- Procurement Notices and Professional services
 - 90 days no use, account deactivated, contact Wendy for re-activation.
 - Award sites
 - must be on state network to access. If you receive a “forbidden” message, contact Wendy or Corinne.
- Note:** An exception will be processed through ICSD which may take several days.

Procurement Notices

- <http://hawaii.gov/spo>
- **For State and County Procurement Personnel, click Procurement Notices.**
- 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 **must** be .htm or .txt.
- If attaching a copy of the solicitation, format must be .pdf.
- You must print copy of the legal ad **from the website** on the first day it is advertised! Complete attestation.
- Keep description concise and to the point.

Procurement Notices 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 (HRS Ch. 103F)

Procurement Notices Tips

- Do NOT use parens, commas, semi-colons, colons, etc in the description field.
- After clicking "Add Notice" screen turns orange if it is accepted. If no orange screen, something went wrong...
- Attachments should not be too large. (2mg)

Procurement Notices Do's and Don'ts

- **Don't enter this:** The State of Hawaii, Department of Transportation, Division of Accounting, is requesting...
- **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...

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.
- 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, create an account using your work e-mail. Send request to email indicated in Procurement Circular 2005-04 Amendment 3.

Hawaii Compliance Express (HCE)

- If vendor is registered in HCE, it is the responsibility of the purchasing agency to log in, verify compliance and print 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 3-122-12
 - Procurement Circular 2005-04 and amendments 1-3

Posting Awards Procurement Reporting System

- <http://hawaii.gov/spo>
- **For State and County Procurement Personnel, click Awards Posting.**
- Prior to requesting access, individual must obtain approval from department authority.
- Detailed instructions: PRS Manual and Procurement Circulars
- The system records date posted, you cannot change it.
- Users may only access awards uploaded by the user (login/password). Divisions/branches may want to share one login/password.

Procurement Reporting System Solicitations 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	\$15,000 and above	7
Sole Source	\$2,500 and above	30
Emergency	\$2,500 and above	30

Procurement Reporting System What Else Must be Reported

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

Procurement Reporting System
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.)

Procurement Reporting System
Purchases that Should Not be Posted
(continued)

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

Note: This listing is not complete. See the PRS Manual for a complete listing.

Procurement Reporting System Tips on Entering Data

- Complete all fields!
- Enter a brief but informative description in the description field.
 - 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.

Procurement Reporting System 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?)

Procurement Reporting System Tips on Entering Data: Amount Fields

- 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.

Awards for Professional Services Method of Procurement

- <http://hawaii.gov/spo>
click **For State & County Procurement Personnel**
- click **Professional Services Method of Procurement Awards**
- Prior to requesting access, individual must obtain approval from department authority.
- Detailed instructions: Prof. Services Manual and Procurement Circulars.
- The system records date posted, you cannot change it.
- Users may only access awards uploaded by the user (login/password). Divisions/Branches may want to have only one password.

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

- 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 40 months. Will automatically be removed. Do NOT delete.

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.)

Other Useful Sites on the SPO Website

<http://hawaii.gov/spo>

- Forms
- Information on Methods of Procurement and Online Procurement Manuals
- Awards Public Site
- 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

State Procurement Office

<http://hawaii.gov/spo>

The End

- Questions?
 - Visit the Website
 - Contact SPO

Mara Smith 587-4704 mara.smith@hawaii.gov

Wendy Orita 586-0563 wendy.m.orita@hawaii.gov

Bonnie Kahakui 587-4702 bonnie.a.kahakui@hawaii.gov

Corinne Higa 597-4706 corinne.y.higa@hawaii.gov