

INSTRUCTIONS FOR COMPLETION OF ONLINE PREQUALIFICATION APPLICATION  
VIA PLANETBIDS PREQUALIFICATION PORTAL

<https://www.planetbids.com/portal/portal.cfm?CompanyID=15331>

IF YOUR FIRM IS BIDDING AN UPCOMING PROJECT, BE CERTAIN TO INDICATE THE CAMPUS, PROJECT NAME, AND BID DATE, IN THE FIRST QUESTION OF THE GENERAL QUESTIONNAIRE SECTION OF THE APPLICATION

**VENDOR PROFILE:** Complete all information PlanetBids Requires (indicated by \*) as appropriate for contracting purposes.

- **COMPANY NAME:** Use name as licensed in the State of California. If the firm is a DBA, enter the licensed Company Name in the indicated 'Company Name' field and the DBA name in the indicated 'DBA' field. If the firm is *NOT* a DBA, leave the DBA field blank.
- **CONTACT INFORMATION:** enter both an email address and alternate email address. The email addresses entered should correspond to the person(s) completing the application. All correspondence regarding application status will be sent to *both* addresses provided.
- **CLASSIFICATIONS/LICENSES**
  - *CA Department of Industrial Relations (DIR) Public Works Registration:* provide DIR Public Works Registration Number and date of expiration; for more information, refer to <http://www.dir.ca.gov/Public-Works/PublicWorks.html>.
  - *Contractor's License:* Enter a valid California State Contractors License and expiration date. Select *all* classifications pertaining to the license. Firms must have held the relevant classification for a minimum of 3 complete years. The information provided will be verified with the CSLB.

After completing the 'New Vendor Registration' or logging in to an existing PlanetBids account, select the 'Prequalification' Tab to apply for the CSU system-wide financial prequalification.

**TYPE OF PREQUALIFICATION:** Indicate 'Prospective Bidder (Prime) Prequalification' for system-wide financial prequalification.

**FINANCIALS:** Enter the Date, Current Assets, and Current Liabilities *exactly* as presented in the Financial Statement.

- **REQUIRED Attachment**
  - Financial Statement: The firm's most recent audited or reviewed financial statement, including the CPA's report that reflects the information provided in this application. A CPA audited or reviewed financial is required and must be less than fifteen months old. Draft financials, compilations, internal Profit & Loss statements, and Tax returns are not accepted in place of the required financial statement.
- **OPTIONAL Attachment**
  - Letter of Credit Form: When using information on a Line of Credit form to augment working capital, the Prequalification Administrator will not utilize a value higher than working capital. This attachment is optional and is only used to augment working capital, if needed. Financial Statements with negative working capital may not be augmented. The bank may issue the Line of Credit Letter on their own letterhead if they prefer, however, it must conform to substantially the same provisions found on our form. No deviations will be considered.

**SAFETY WORKSHEET:** Once all required information is entered, a composite score will be generated automatically. An overall score of 25 points or more is required; failure to achieve an overall score of 25 points will result in disqualification. Should the firm's score fall below 25 points, continue with the prequalification process and the Prequalification Administrator will review the submittal and make a final determination.

- **OSHA INFORMATION:** Enter the total number of Lost Workday *incidents* (Column H on OSHA Form 300 or 300A Summary), total number of Recordable *incidents* (Sum of Columns G, H, I and J of OSHA 300 or 300A), and Total Employee Hours (Found on OSHA 300A Summary) for each year for the past three (3) years. No fields may be left blank. All applicable zeroes must be entered.
- **EXPERIENCE MODIFICATION RATE:** Enter WCIRB or California Intrastate EMR rating. Workers' Compensation Providers commonly display EMR as a percentage. Convert to a decimal to enter. Firm's that do not qualify for an EMR enter '1.00.'

- **REQUIRED Attachments**
  - OSHA Forms: For California operations ONLY, upload OSHA form no. 300 (*Log of Work-Related Injuries and Illnesses*) and OSHA form no. 300A (*Annual Summary of Work-Related Injuries and Illnesses*) covering the past three (3) years. Both OSHA Forms 300 & 300A are required for the last 3-complete years. **The forms for all three years must be combined into one PDF to upload.**
  - EMR Documentation: Current WCIRB Issued Experience Rating Form (EMR).  
<https://www.wcirb.com/guide-to-workers-compensation/experience-rating/experience-rating-wksheet>
  - Certificate of Insurance: Proof of current workers' compensation insurance. If Self-Insured, upload Certificate of Self-Insurance.

**OWNERS:** At least one owner must be entered. This will be the addressee on official documentation, including approval letters.

- **OPTIONAL attachment**
  - If your firm has five or less primary officers, enter the names individually as required under 'Owners'. For a more extensive listing, upload a complete listing of officers indicating each officer's name and position with the firm. This attachment is only required if your firm has more than five officers.

**CLIENTS/REFERENCES:** Enter no less than five (5) project references. All projects to be used as references must have been completed in California within the last 5 years. At least three (3) of the projects entered must have contract values in excess of \$600,000. **PREQUALIFICATION RENEWAL APPLICANTS MUST INCLUDE PROJECTS COMPLETED WITHIN THE LAST FIFTEEN (15) MONTHS.**

- **REQUIRED Attachment**
  - Project History List: Upload a list of all public works & private sector projects completed by your firm in the past 5 years for projects over \$600,000, and include all projects performed for the California State University System in the past 7 years. The project listing shall include name of project and location, total value of construction (including change orders), project completion date (specify month and year, then list in chronological order, with most recently completed projects first), project owner (specify name of public agency or private entity), and owner reference point of contact (include contact name and current e-mail address). The information listed above is required for each project on the project history list. For your convenience, we have provided a template. The use of the template is not required, as long as your firm's documentation concisely presents all required information. **THIS IS A SEPARATE REQUIREMENT FROM THE PROJECT REFERENCES TYPED IN TO THE APPLICATION.**

**BONDING INFORMATION:** Enter all information exactly as stated on the provided surety letter.

- **REQUIRED Attachment**
  - Letter from Bonding Company: Provide a currently dated letter from the firm's bonding company addressed to The Trustees of The California State University confirming your firm's current bonding capacity on a per project basis and on an aggregate basis. Further, the letter shall indicate whether claims have ever been made against the surety, and explain these claims. The address to be used is 401 Golden Shore, Long Beach, California 90802.

**GENERAL QUESTIONNAIRE**

- **QUESTION 1:** If your firm is interested in bidding an upcoming project, provide the Campus Name, Project Name, and Bid Due Date.
- **QUESTION 2:** Provide DIR Registration number and expiration date under the 'Vendor Info/Classifications' tab.
- **QUESTION 3:** If yes, provide a certificate of self-insurance in the 'Certificate of Insurance Coverage' upload location.
- **ALL REMAINING QUESTIONS:**
  - **If yes is answered to ANY** remaining questions, an explanation is a **REQUIRED Attachment** in the Litigation Details and/or the Bankruptcy Information file upload location(s).