

# Qualify

## *Frequently Asked Questions*

<a href="#"><u>Administrative</u></a>	2
<a href="#"><u>Using Qualify</u></a>	3
<a href="#"><u>Miscellaneous</u></a>	5

## Administrative

### **What is Qualify?**

Qualify is a Kahua application designed to help subcontractors manage prequalification.

### **Do I need a Kahua Platform License to use Qualify?**

You do not need a Kahua Platform License to use Qualify. A Kahua Platform License, however, is required to use Kahua's other apps, such as the apps in [Subcontractor Project Management](#).

### **How do I access Qualify?**

After creating your Kahua account and purchasing a Qualify license, you can access Qualify by [downloading Kahua's host application](#). Log in and find Qualify under the Apps menu in the top toolbar.

### **Does Qualify require any setup?**

Prior to using Qualify, you should add a company logo as well as an image to represent your signature. Both your company's logo and signature image are added to outgoing Statements of Qualifications for a professional look. See help category [Initial Steps](#).

### **How do I invite someone else at my organization to use Qualify?**

Add the person to your local contacts in the Contacts app (under the apps menu). Be sure to specify their organization and email address. After saving the contact, click Invite to Kahua. Kahua will send your contact a link to create an account. Note that a user does not need an invitation to create an account and can [create an account on their own](#).

Once a user creates an account, your organization's Kahua Domain Administrator will need to approve them. To approve a user to log in to your organizations domain in Kahua, access the Tasks app (from the top menu bar), select the task titled "Kahua Join Request" and click Approve.

### **Can multiple people work on a Statement of Qualifications at the same time?**

Kahua recommends a team-based approach to filling out your Statement of Qualifications. For multiple people to access Qualify simultaneously, each person needs their own Qualify license. Otherwise, the Kahua Domain Administrator must reassign the Qualify license to the person actively working on the Statement of Qualifications. See FAQ "How do I transfer the Qualify License to someone else at my organization?"

### **How do I reassign the Qualify license to someone else at my organization?**

Your organization's Kahua Domain Administrator can reassign your Qualify license to someone else at your organization with access to Kahua. In the Licenses app (under the apps menu), select Qualify. Select the user with the Qualify license and click Revoke. Then, select the newly available license and click Assign to specify the new holder of the Qualify license.

### **How do I make someone else a Kahua Domain Administrator for my organization?**

Your organization's Kahua Domain Administrator can give someone else at your organization administrative privileges. In the Groups app (under the apps menu), select Domain Administrator. Enter the person to whom you want to give privileges in the "Types names of people to add" field and click Add. From the same screen, you can remove privileges from any user (including yourself).

## Using Qualify

### **How come I'm not seeing recent changes to my Statement of Qualifications when I view the PDF of it?**

Depending on the amount of data you have entered, the PDF of your Statement of Qualifications may take a few moments to be created. In certain instances, Qualify will display a previous rendering of your Statement of Qualifications while it is still rendering your newest version. If this happens, wait a few minutes before viewing the PDF again to see your changes.

### **Some general contractors require a customized Statement of Qualifications. Can I create a custom view of the data in Qualify?**

Qualify does not support custom views of your qualification data. Your options are ConsensusDocs 721, General Qualification Statement, and Project Questionnaire (in addition to Cover Letter and Content List). However, you can export your qualification data from Qualify to copy and paste into custom forms. To export Qualify data, see help topic [Exporting Data from a Statement of Qualifications](#).

Alternatively, you can download the Qualify-produced PDF and edit it with a PDF editor, such as Adobe Acrobat. To download a PDF from Qualify, view the PDF in the Statement of Qualifications sub app (see help topic [Previewing Your Outgoing Statement of Qualifications](#)), and then click the PDF icon in the upper right-hand corner of the PDF. In the PDF viewer that opens, click download.

### **What should I do if a general contractor requires additional information not available in the Qualify app?**

Create a text document with the missing question and your response. In the Required Documents form, upload your document. When sending your Statement of Qualifications, include your document in your Composite PDF.

### **I'm creating a prequalification request but I can't find the right person to add in the Company Contact field. What do I need to do to make this person available for selection?**

The names available for selection come from your local contacts in Kahua. To add someone to your local contacts, access the Community app (under the apps menu). Search for your contact to check if they are already part of The Kahua Network. If you find them, click Add to Contacts to add them to your local contacts. Otherwise, access to the People tab and click New to create a new local contact. Be sure to enter an email address for your local contact if you intend to route a Statement of Qualifications to them.

### **What is a Composite PDF? Which PDFs should I include in my Composite PDF?**

Your Statement of Qualifications may have many attachments. Rather than emailing them as separate attachments, you can compile them into a single PDF so all of your information stays together in one file for general contractors to review. To create a Composite PDF, see help topic [Responding to a Prequalification Request](#).

Kahua recommends that you include a cover letter and content list in your Composite PDF. Additionally, you need to decide whether to send ConsensusDocs 721, General Qualification Statement, and/or Project Questionnaire:

- Include ConsensusDocs 721 when a project-specific qualification is requested. When using ConsensusDocs 721, there is no need to include the Project Questionnaire or the General Qualification Statement. Though, you may choose to include these forms as

supplements because they report the data in a different format and include some additional information about your company.

- Include the General Statement of Qualifications when you are responding to a general prequalification invitation (i.e., not related to a specific project). For this type of request, you do not need send ConsensusDocs 721 or the Project Questionnaire.
- Include the Project Questionnaire when you need to send out project-specific information without the rest of your qualifications. This might happen when a general contractor maintains a “Bidder List” of prequalified subcontractors and only needs project-specific qualifications.

Finally, you need to include any required documents in your Composite PDF.

#### **How do I preview my Composite PDF?**

After creating your Composite PDF, it may take about a minute for Qualify to stitch your documents together. You can check the status of your Composite PDF in the Documents section of your prequalification request. If it has a status of “Rendering,” Qualify is still compiling your Composite PDF and it is not available for preview. Once it has a status of “Rendered,” you can select your Composite PDF and click View to preview it.

#### **How do I change the cover letter and content list?**

Create your own cover letter document as a PDF or .doc file. In the Documents section of the Required Documents form, click upload to browse and attach your custom cover letter. During the process of building your Composite PDF, exclude the cover letter produced by Qualify and select the document you uploaded.

#### **Can I send a document as a separate attachment instead of as part of the Composite PDF?**

You can send a document as a separate attachment. In the Documents section of your prequalification request, select the document you want to send as a separate attachment and click Edit. Check the box for “Include on Send.”

## Miscellaneous

### **How can I obtain my financial strength rating (FSR)?**

Your bond agent is likely your best resource for this information.

### **On the Required Documents form, why is a sample Acord 25 requested instead of an actual Acord 25?**

Typically, an actual Acord 25 Certificate of Insurance is issued on a specific project basis after the award of the project.