

# **Woolpert Subconsultant Portal**

Before registration and profile setup

# Before you begin: required information

- company name
- website
- phone number
- email
- point of contact details
- year established
- state established
- type of entity
- TAX ID
- annual gross revenue
- 3-year annual receipts
- number of employees
- banking information (bank name and address)
- UEI number or DUNS number

**Review all information you will need to complete your company profile; this will make the overall process seamless. PDF, word documents accepted.**



# Before you begin: required documents

- **Required Files (Insurance):**

- Commercial General Liability
- Professional Liability
- Auto Liability
- Bodily Injury/Property Damage
- Excess/Umbrella Liability
- Worker's Compensation
- Cyber Security
- *Note can be the same document for each but will need to be uploaded in each spot. If you have any exemptions, please contact: DSP Admin help*

- **Required Files (Other):**

- Banking information, i.e., cancelled check
- Tax information, i.e., W9 form
- Diverse certificate, if applicable.

For questions or support please reach out to:  
[Jade.Deis@woolpert.com](mailto:Jade.Deis@woolpert.com)

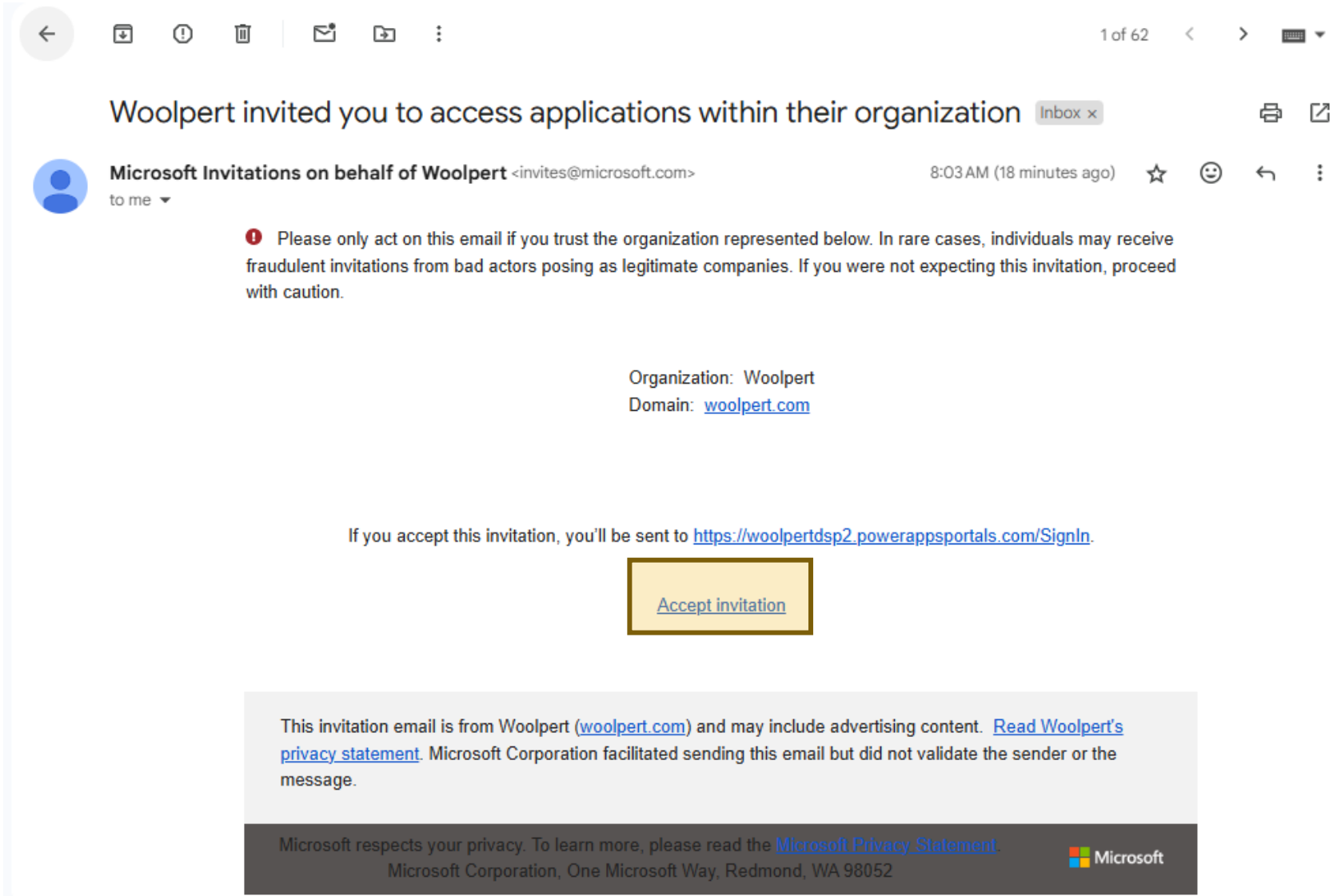
**Review all information you will need to complete your company profile; this will make the overall process seamless. PDF, word documents accepted.**



# Registration and Profile Setup

# Registration

You will receive an invitation to Woolpert's Subconsultant portal. When you click to accept the invitation, follow the prompts to set up your Multi Factor Authentication.



The screenshot shows an email interface with a navigation bar at the top containing icons for back, forward, delete, and other actions. The subject line reads "Woolpert invited you to access applications within their organization" with an "Inbox x" label. The sender is "Microsoft Invitations on behalf of Woolpert" with the email address "<invites@microsoft.com>". The recipient is "to me". The email body contains a warning: "Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution." Below this, it states "Organization: Woolpert" and "Domain: [woolpert.com](https://woolpert.com)". A link is provided: "If you accept this invitation, you'll be sent to <https://woolpertdsp2.powerappsportals.com/SignIn>." A yellow button with a black border is labeled "Accept invitation". At the bottom, a grey box contains a disclaimer: "This invitation email is from Woolpert ([woolpert.com](https://woolpert.com)) and may include advertising content. [Read Woolpert's privacy statement](#). Microsoft Corporation facilitated sending this email but did not validate the sender or the message." The footer includes "Microsoft respects your privacy. To learn more, please read the [Microsoft Privacy Statement](#). Microsoft Corporation, One Microsoft Way, Redmond, WA 98052" and the Microsoft logo.




# Registration

The following screenshots show the process using Microsoft Authenticator, but you can choose other methods if you prefer.

## Keep your account secure

### Microsoft Authenticator



#### Start by getting the app

On your phone, install the Microsoft Authenticator app. [Download now](#)

After you install the Microsoft Authenticator app on your device, choose "Next".

[I want to use a different authenticator app](#)

[Next](#)


[I want to set up a different method](#)

# Registration

Continue to follow prompts for authentication setup.

## Keep your account secure

### Microsoft Authenticator



#### Set up your account

If prompted, allow notifications. Then add an account, and select "Work or school".

[Back](#) [Next](#)

[I want to set up a different method](#)

# Registration

Continue to follow prompts for authentication setup.

Keep your account secure

## Microsoft Authenticator

### Scan the QR code

Use the Microsoft Authenticator app to scan the QR code. This will connect the Microsoft Authenticator app with your account.

After you scan the QR code, choose "Next".



Can't scan image?

Back

Next

[I want to set up a different method](#)



# Registration

Continue to follow prompts for authentication setup.

Keep your account secure

Microsoft Authenticator



✔ Notification approved

Next

[I want to set up a different method](#)



# Registration

Continue to follow prompts for authentication setup.

## Keep your account secure

Success!

Great job! You have successfully set up your security info. Choose "Done" to continue signing in.

**Default sign-in method:**



Microsoft Authenticator

Done



# Registration

Continue to follow prompts for authentication setup.



## Subconsultant Portal

 Sign in

[Register](#)

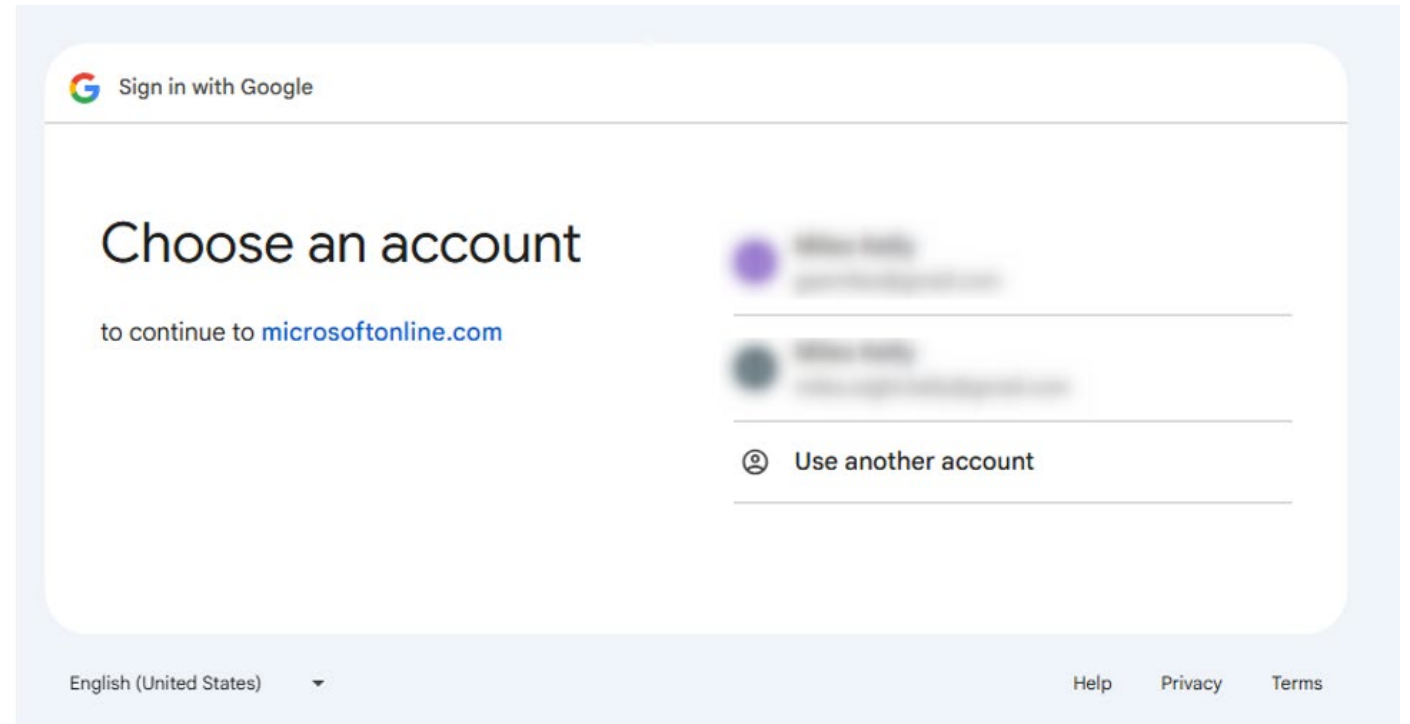
### Sign in with an external account

Sign In



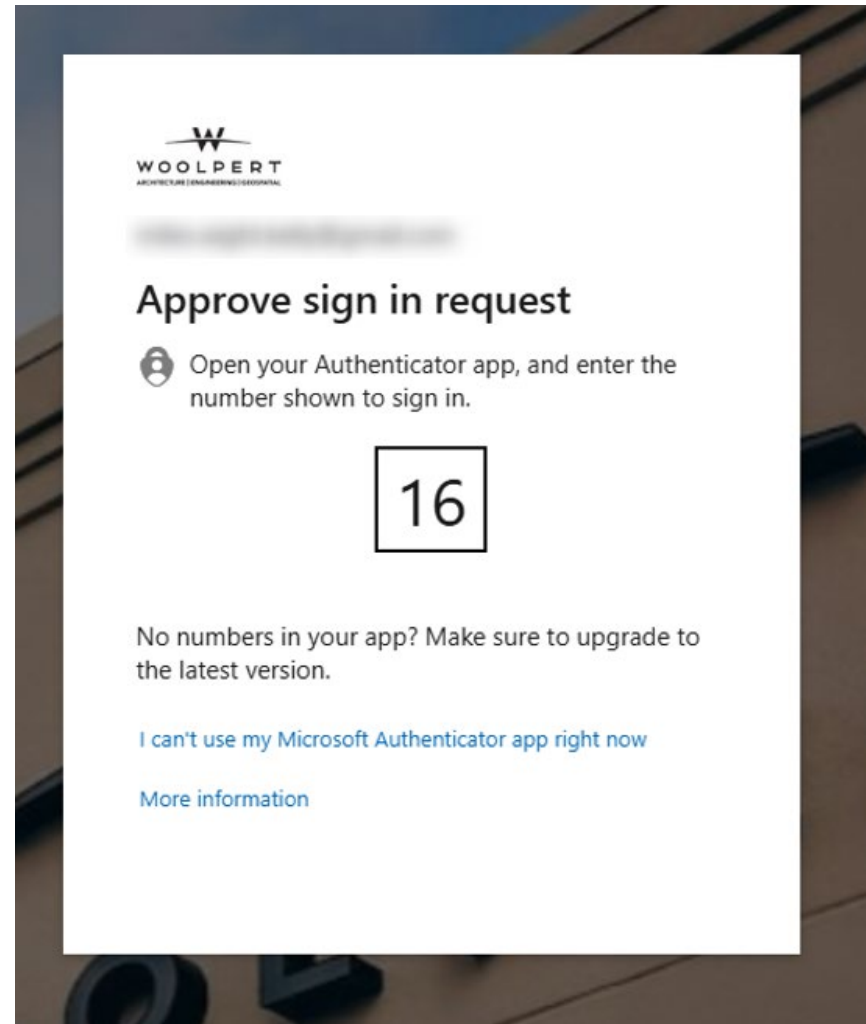
# Registration

You will get prompt to log in with your external email. Here is the screenshot if using Gmail. If your external account has MFA associated with it, you will be prompted for that at this point in the process.




# Registration

Continue to follow prompts for authentication setup.



# Registration

Continue to follow prompts for authentication setup.



Microsoft

Permissions requested

Power Portal Pages  
**unverified**

**This application is not published by Microsoft.**

This app would like to:

- ✓ View your basic profile
- ✓ Maintain access to data you have given it access to

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel Accept



# Registration

Within the DSP portal, enter your email address to register your account.



## Subconsultant Portal

### Register your external account

- The Email field is required.

**Email**

Provide an email address to complete the external account registration.

**Register**



# Registration


Complete the requested information and click Submit.


Required fields are noted with a red asterisk (\*)

Return here to view profile information anytime

Home > Profile

## Profile

 Profile name

 Security  
Manage external authentication

## Personal Profile

**First Name \***

**Last Name \***

**E-mail \***

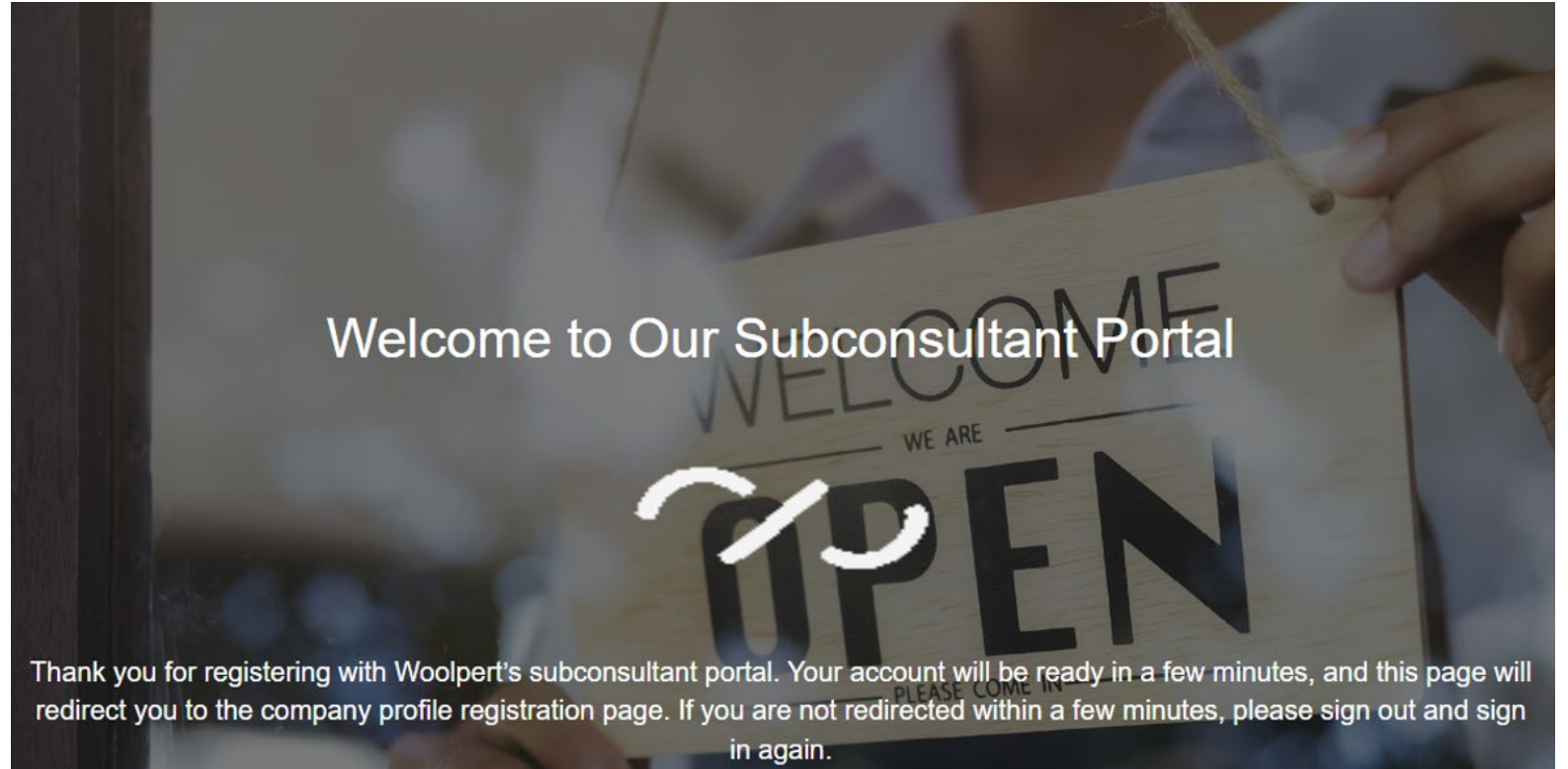
**Business Phone**  
Provide a telephone number

**Company Name \***

Submit

# Registration

Wait a few minutes for the account to be ready. If you are not redirected within a few minutes, sign out and sign in again.



Thank you for registering with Woolpert's subconsultant portal. Your account will be ready in a few minutes, and this page will redirect you to the company profile registration page. If you are not redirected within a few minutes, please sign out and sign in again.

# Profile Setup – General Information

## Required Fields:

- Company Name
- Website
- Phone (Company)
- Company Email (default to user email)
- Point of Contact First Name
- Point of Contact Last Name
- Point of Contact Title
- Point of Contact Email
- Point of Contact Phone
- HQ (Headquarters) Street Address 1
- HQ City
- HQ State/Province
- HQ Zip
- Procurement Information, check if same as Point of Contact. If not the same, please include contact information.
- Remittance Address, check if same as HQ Address

### General Information

<p><b>COMPANY PROFILE</b></p> <p><b>Name of Company *</b>  <input type="text" value="Company Name"/></p> <p><b>Website *</b>  <input type="text" value="http://companywebsite.com"/></p> <p><b>Company Description</b>  <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></p> <p><b>Phone *</b>  <input type="text" value="000-000-0000"/></p> <p><b>Company Email *</b>  <input type="text" value="name@companyname.com"/></p>	<p><b>Points of Contact</b></p> <p><b>POC First Name *</b>  <input type="text" value="First"/></p> <p><b>POC Last Name *</b>  <input type="text" value="Last"/></p> <p><b>POC Title *</b>  <input type="text" value="Title"/></p> <p><b>POC Email *</b>  <input type="text" value="POC@company.com"/></p> <p><b>POC Phone *</b>  <input type="text" value="300-000-000"/></p> <p><input type="checkbox"/> Procurement Same as POC</p> <p><b>Procurement First Name</b>  <input type="text" value="First"/></p> <p><b>Procurement Last Name</b>  <input type="text" value="Last"/></p> <p><b>Procurement Title</b>  <input type="text" value="Title"/></p> <p><b>Procurement Email</b>  <input type="text" value="POC@company.com"/></p> <p><b>Procurement Phone</b>  <input type="text" value="300-000-000"/></p>	<p><b>HQ Address</b></p> <p><b>HQ Street Address 1 *</b>  <input type="text" value="123 Main Street"/></p> <p><b>HQ Street Address 2</b>  <input type="text" value="Suite 1"/></p> <p><b>HQ City *</b>  <input type="text" value="Dayton"/></p> <p><b>HQ State/Province *</b>  <input type="text" value="OH"/></p> <p><b>HQ Zip *</b>  <input type="text" value="45420"/></p> <p><b>Remittance Address</b></p> <p><input checked="" type="checkbox"/> Same as HQ Address</p> <p><b>Street 1</b>  <input type="text" value="123 Main Street"/></p> <p><b>Street 2</b>  <input type="text" value="Suite 1"/></p> <p><b>City</b>  <input type="text" value="Dayton"/></p> <p><b>State/Province</b>  <input type="text" value="OH"/></p> <p><b>ZIP/Postal Code</b>  <input type="text" value="45420"/></p> <p><b>Additional Office Location(s)</b>  <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div></p>
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**Next**



## Required Information

Year Established

State Established

Type of Entity

XBE Type (multiple selection a large business or does not apply)

TAX ID (TIN)

Annual Gross Revenue

3-Year Annual Receipts

Number of Employees

Banking Information (text field address of the bank)

## Other Fields

UEI Number (Unique Entity Identifier issued by SAM)

DUNS # (Replaced by UEI number)

SPRS Score (Supplier Performance Score)

CMMC Certification Level (Cyber Maturity Model Certification)

Currency

NAICS Code

## Business Information

### Basic Information

Year Established \*

1911

State Established \*

OH

Type of Entity \*

Corporation (Multiple Shareholders)

XBE Types \*

SDVOSB (Service Disabled Veteran Owned Small Business) +16

UEI Number

DUNS #

TAX ID \*

123-45-6789

SPRS Score

CMMC Certification Level

Select

Currency

US Dollar

Annual Gross Revenue \*

3-Year Annual Receipts \*

Select

Number of Employees \*

Select

Banking Information \*

NAICS Codes - Please choose a primary code and associate additional codes, if applicable

Primary NAICS Code

Additional NAICS

Associate

Code ↑ Description

There are no records to display.

Lookup records

engineer

Code ↑

Description

237990

Other Heavy and Civil Engineering Construction

321215

Engineered Wood Member Manufacturing

541330

Engineering Services

541715

Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

Selected records

541330

Currency

US Dollar

Annual Gross Revenue \*

4578963210

3-Year Annual Receipts \*

\$14M - \$33.5M

Number of Employees \*

501 - 1000

Banking Information \*

Test for Banking Information provided by Client

Optional Information - Tell us more about your company. Have you worked with us previously? Any awards won? Anything else we need to know about your company?

Additional Company Information

Additional Company Information

Woolpert Service Interests

Select or search options

Previous

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name and address of bank



# Federal Acquisition Regulation (FAR)

Federal Acquisition Regulation (FAR) 52.204-10. It is designed to gather information about your firm's federal contracts, grants, and executive compensation reporting requirements.

Please review the following questions and check the box if the answer is "Yes" to any of the questions.

If you have any questions or need further assistance, feel free to reach out to our support team.

22%

## FAR 52.204-10 (Federal Acquisition Regulation)

In the preceding fiscal year, did your firm receive 80% of its annual gross revenues in Federal contracts (and subcontracts), loans, grants (and sub grants), and cooperative agreements?

FAR 52-1

In the preceding fiscal year, did your firm receive \$25,000,000 or more in Federal contracts (and subcontracts), loans, grants (and sub grants), and cooperative agreements?

FAR 52-2

Does the public have access to information about the compensation of the senior executives through period reports filed under Section 13(a) or 15(d) of the Security and Exchange Act of 1934 (15 U.S.C 78m(a), 78o(d) or Section 6104 of the Internal Revenue Code of 1986?

FAR 52-3

Executive Compensation must be reported ONLY if you answered YES to the first two questions but NO to the third. If all three answers are NO, no reporting is necessary.

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# Profile Setup – Capabilities

Click Associate

Search for skill and or capabilities

Select as many necessary

Click add

## Corporate Skills and Capabilities

Please associate all applicable Skills and Capabilities with your Company

Associate

Name ↑

There are no records to display.

Previous

Next

### Lookup records

Search



✓ Name ↑

- Aerial Photography
- Architecture
- As-Built/ALTA Surveys
- Asset Management
- Aviation Design Service
- Boundary/ROW Surveys

< 1 2 3 4 5 6 >

Selected records

Aerial Photography ✕

Add

Cancel

## Insurance Information

You may use the same document for each file type (I.e., certificate of insurance) if it shows the required information. But each file must be uploaded.

### Required Files:

Commercial General Liability

Professional Liability

Auto Liability

Bodily Injury/Property Damage

Excess/Umbrella Liability

Worker's Compensation

Cyber Security

### Click: Create

Select Coverage Type

Coverage Expiration Date

Coverage Amount

Upload Files

Click: Submit

Repeat for each required file.

PDF, Word documents accepted.

44%

## Insurance Information

Please create Insurance Policy records and upload Certificates of Insurance here. For Partner Application, the following types of insurance are required: Commercial General Liability, Professional Liability, Auto Liability, Bodily Injury/Property Damage, Excess/Umbrella Liability, Worker's Compensation and Cyber Security.  
Specialized coverage may be required for certain projects, as applicable

Create

Status	Coverage Type	Coverage Amount	Coverage Start Date	Coverage Expiration Date	Created On
There are no records to display.					

Previous Next

Create

Coverage Type \*  
Select

Coverage Start Date  
M/D/YYYY

Coverage Expiration Date \*  
M/D/YYYY

Coverage Amount \*

Upload Files \*  
Choose Files No file chosen

Submit

Status	Coverage Type	Coverage Amount	Coverage Start Date	Coverage Expiration Date	Created On
Received	Cyber Security	\$0.00	1/1/2026	1/10/2025 2:51 PM	
Received	Workers Compensation	\$0.00	1/1/2026	1/10/2025 2:50 PM	
Received	Excess/Umbrella Liability	\$0.00	1/1/2026	1/10/2025 2:50 PM	
Received	Bodily Injury/Property Damage	\$0.00	1/1/2026	1/10/2025 2:50 PM	

< 1 2 >

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## Required Files:

Tax Documentation: W-9

Banking Information: Canceled check, ACH information, any item with banking details

Diverse Supplier Information certification

## Additional Files if applicable:

Anti-Slavery

Anti-Money Laundering

Anti-Bribery

Subconsultant Code of Content

Click: Create

Name: description of file (I.e., cancelled check, WBE certificate)

Select Document Type

Expiration Date, if applicable

Upload Files

Click: Submit

Repeat for each required file.

PDF, Word documents accepted.

55%

## Tax Documentation, Banking and Diverse Supplier Information

Please upload the following documents:

- **Tax Documentation:** Upload a W-9 form or any other relevant tax documentation required for tax purposes.
- **Banking Information:** Upload a canceled check or ACH information to provide banking details.
- **Diverse Supplier Information:** If applicable, upload any certifications or documentation that verify status as a diverse supplier (e.g., minority-owned, women-owned, veteran-owned, etc.).

Create

Name SubConsultant Document Type Expiration Date Status Created On

Create

There are no records to display

Previous

Next

Document Types: Banking Information, Tax Documentation, Diverse Certification

Name \*

Document Type \*

Select

Expiration Date (if Applicable)

M/D/YYYY

Upload Files \*

Choose Files No file chosen

Submit

diverse supplier (e.g., minority-owned, women-owned, veteran-owned, etc.).

Create

Name	SubConsultant	Document Type	Expiration Date	Status	Created On
XBE	Company Name	Diverse Certification Type		Received	1/10/2025 3:17 PM
Canceled Check	Company Name	Banking Information		Received	1/10/2025 3:17 PM
W-9	Company Name	Tax Documentation		Received	1/10/2025 2:58 PM

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Next



# Profile Setup – Document Uploads

You will need to have uploaded all required documents to move ahead.

If any of the items with a \* are not checked, you must hit before upload.

Once all are checked you may move ahead by choosing “next”.

62%

## Documents Upload Status

### Required Insurance Policies

- Uploaded Commercial General Liability \*
- Uploaded Professional Liability \*
- Uploaded Auto Liability \*
- Uploaded BI/PD \*
- Uploaded Excess/Umbrella \*
- Uploaded Workers Comp \*
- Uploaded Cyber Security \*

### Other Required Documents

- Uploaded Tax Documentation \*
- Uploaded Banking Information \*

### Required if Diverse

- Uploaded Diverse Certificate \*

### Other Documents

- Uploaded Other Documents
- Uploaded Subconsultant Code of Conduct

### Policies if Applicable

- Uploaded Watercraft Liability
- Uploaded Aircraft Liability
- Uploaded Other Insurance
- Uploaded Employer Liability
- Uploaded Anti-Slavery
- Uploaded Anti-Bribery
- Uploaded Anti-Money Laundering

[Previous](#) [Next](#)



# Profile Setup

Open the Woolpert Supplier Code of Conduct and check the box.

77%

## Woolpert Supplier Code of Conduct

[Open Woolpert Supplier Code of Conduct](#)

**By accepting this Code of Conduct, I acknowledge that I have read, understood, and agree to comply with all the terms and conditions set forth. I understand that any violation may lead to disciplinary actions as outlined in the relevant policies \***

[Previous](#) [Next](#)



# Profile Setup - Submission

Click Submit

88%

## Submission

Your application is in draft status. Please click the button below to submit your application. Thank You!

Previous

Submit

Submission completed successfully.



# Activity Log

Your submission is now in review, you can track the status from the Activity Log.

Emails from [dsp.service@woolpert.com](mailto:dsp.service@woolpert.com) will keep you updated on submission status and document status.

In the case where documents are rejected, a portal admin will contact you with more information. You will be able to resubmit.

Time for approval is approximately 3 days



## Requires Action

Record Type	Title	Activity Type	Created On ↓
There are no records to display.			

## All activities

Record Type	Title	Activity Type	Created On ↓
Account	Subconsultant Application Submitted	Submitted	1/10/2025 3:24 PM



# Purchase Orders & Invoices

After approval, you will find tab for purchase order. This will be related to any project you are working on with Woolpert.

Here you can attach invoices for the posted purchase orders (PDF).

**WOOLPERT Subconsultant Portal**

Home | Company Profile | Insurance | Documents | Projects | Purchase Orders | Invoices | Activity Log | Resources | [Dropdown]

Below is a list of Purchase Orders that are associated with your organization

Name	Delivery Date ↓	Project	PO Status
PUPO0010600	7/10/2024	SUB - AAM	Open Order

Please Create Invoice Records here and Upload PDF Invoices for each Invoice entered.

Name ↑	Purchase Order	Vendor Invoice #	Project	Date Submitted	To
1234	PUPO0000224	test	Construction Ins WSSI Phase 2 Tuscio	10/7/2024	R4
INV1244	PUPO0010600	INV1244	SUB - AAM	10/28/2024	R5
INV28101311	PUPO0010600	INV28101311	SUB - AAM	10/28/2024	R7
INV567		Invoice from DSP Admin		10/7/2024	R7
invoice 0810_portal	PUPO0010600	Test0810_portal	SUB - AAM	10/8/2024	R4

< 1 2 3 4 5 6 >

**Posted Invoices**

Invoice Number	Total Amount	Settlement
ARFT0000013	R13,500.00	No
ARFT0000004	R13,500.00	No
ARFT0000008	R13,500.00	No
ARFT0000011	R13,985.31	No
ARFT0000017	R17,386.34	No

**Create**

Lookup records

Search [ ]

Choose one record and click Select to continue

<input checked="" type="checkbox"/>	Project Header	Project #	Project	Delivery Date	PO Status
<input type="checkbox"/>	R-44240 - INDOT I-65 Boone County 2025	10017607.01.004	Sub B&N - Subconsultant Inspection	6/9/2025	Open Order
<input type="checkbox"/>	Safety Design 2024 - T1_D2-WOO-420	10019371.01.095	T1-Sub Burgess & Niple	5/19/2024	Open Order
<input type="checkbox"/>	GRE-675-8.95 Grange Hall Interchange	10005202.00.095	P1 - Sub B&N	12/20/2023	Open Order
<input type="checkbox"/>	ODOT, 2024, HAM-75/275 Interchange	10019907.00.070	P1 - Sub Burgess & Niple	4/17/2025	Open Order

Select Cancel Remove value



# Purchase Orders & Invoices

You may view the status of invoices from the Subconsultant portal where invoice status will be updated when it is changed/modified in DSP admin portal by Project Accountant.

Please Create Invoice Records here and Upload PDF Invoices for each Invoice entered.

Name ↑	Purchase Order	Vendor Invoice #	Project	Date Submitted	Total Amount	Invoice Status
1234	PUPO0000224	test	Construction Ins WSSI Phase 2 Tuscio	10/7/2024	R45,000.00	Received
INV1244	PUPO0010600	INV1244	SUB - AAM	10/28/2024	R5,000.00	Received
INV28101311	PUPO0010600	INV28101311	SUB - AAM	10/28/2024	R7,000.00	Received
INV567		Invoice from DSP Admin		10/7/2024	R7,760.00	Received
invoice 0810_portal	PUPO0010600	Test0810_portal	SUB - AAM	10/8/2024	R45,000.00	Received

< 1 2 3 4 5 6 >

## Posted Invoices

Invoice Number	Total Amount	Settlement
ARFT0000013	R13,500.00	No
ARFT0000004	R13,500.00	No
ARFT0000008	R13,500.00	No
ARFT0000011	R13,985.31	No
ARFT0000017	R17,386.34	No



# General Information



# Sample DSP email alerts (dsp.service@woolpert.com)

## Required Insurance Policy Approval Alerts

This workflow will send alerts at the following stages for the Insurance Policy status

Pending Expired – Insurance Policy with a Coverage Expiration Date < 30 dates

To: Subconsultant Primary Contact

Subject: Woolpert DSP2 Portal Insurance Policy Pending Expiration

### Message Body:

<This is sent from a mailbox that is NOT monitored. Do not reply to this email if you need more information.>

{Subconsultant}

The Diverse Subconsultant {Coverage Type} Insurance Policy submitted will or has expired on {Coverage Expiration Date}. Please upload a current Insurance Policy here: {Link to record}

## Required Insurance Policy Approval Alerts

This workflow will send alerts at the following stages for the Insurance Policy status

Expired – Insurance Policy with an expired Coverage Expiration Date

To: Subconsultant Primary Contact

Subject: Woolpert DSP2 Portal Insurance Policy Expired

### Message Body:

<This is sent from a mailbox that is NOT monitored. Do not reply to this email if you need more information.>

{Subconsultant}

The Diverse Subconsultant {Coverage Type} Insurance Policy submitted will or has expired on {Coverage Expiration Date}. Please upload a current Insurance Policy here: {Link to record}



## Contacts

- General Inquiries/DSP Admin: Jade Deis  
[jade.deis@woolpert.com](mailto:jade.deis@woolpert.com), 937.531.1451
- IT/Power App Questions: David Howell  
[David.Howell@Woolpert.com](mailto:David.Howell@Woolpert.com)
- Project Manager for Purchase Order Questions
- Portal link:  
<https://woolpertdsp2.powerappsportals.com/>

