

## For HBITS Executive Agency

### How to Guide 1:

## The HBITS Form Process

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### THE CANDIDATE SELECTION PROCESS

#### Steps 1-9 / Forms 1-3B

1. Prior to completing Form 1: Task Order Request Form, the Executive Agency must have all Agency approvals and PTP, B-1184 and, if necessary, Federal approvals.
2. The Executive Agency completes [Form 1: Task Order Request Form \(TO\)](#) and then forwards to the HBITS Team at [HBITS.StateAgencies@ogs.ny.gov](mailto:HBITS.StateAgencies@ogs.ny.gov). Once the HBITS Team has assigned your request a number, a reply will be sent confirming receipt.
  - a. Spell out acronyms when writing request (at least for the first instance).
  - b. Explain program language(s), platforms, etc., used by agency specific systems.
3. The HBITS Team reviews the request, validates all data fields, and ensures that the TO form is in compliance with all contractual terms. Allow 2-3 days for processing.
  - a. If not in compliance, the TO will be returned to the Executive Agency to edit and resubmit.
  - b. Once validated, the TO is sent via e-mail to all active HBITS Contractors.
4. Contractors review e-mail of new Task Order.
  - a. Contractors then propose candidates using [Form 2: Candidate Response Form](#). Allow 10 days for processing, not including date of transmission.
  - b. Contractor e-mails completed forms to [HBITS.Contractors@ogs.ny.gov](mailto:HBITS.Contractors@ogs.ny.gov).
5. The HBITS Team will collect and review all responses received (<http://ogs.ny.gov/BU/PC/hbits/docs/ReviewProcess.pdf>) for the following components:
  - a. Validates mandatory requirements for HBITS title
  - b. Reviews the requested qualifications
  - c. Ranks the candidates based on the hourly rate.

This process typically takes 1-2 days, after which the information is released to the agency

6. For those submissions that passed the review process and cost methodology, the Executive Agency reviews the candidate Form 2's to determine the most technically qualified to interview and notifies the HBITS Team using [Form 3A: Authorized User Preliminary Technical Evaluation Form](#) of the candidates it has selected to interview. All other candidates are released by the HBITS Team. Allow 1-5 days for processing.
  - a. Selection of candidates for interviews must be done within 5 days. Failure to complete this step timely may result in **all** candidates being released for consideration for other staffing requests.
7. The Executive Agency schedules interviews (at a minimum, top 3 candidates must be interviewed for 1 position). Agency interviews selected candidates to validate initial scores and qualifications. The Executive Agency then completes [Form 3B: Authorized User Interview Evaluation Form](#) for all interviewees. Allow 2-5 days for processing. The Executive Agency:

- a. Must include rationale when changing any qualification score.
  - b. Select the highest technically scored candidate(s) after interviews.
  - c. Update the HBITS Team of candidate(s) selected, all remaining candidates are released.
  - d. Work with contractor to set up start date with consultant.
8. The HBITS Team ensures that all forms have been completed by the Executive Agency and the Contractor, and have been properly entered into the database.
9. Contractor performs all candidate placement requirements and finalizes on-boarding of consultant. Allow 10 business days for processing. This includes, but is not limited to:
- a. Necessary background checks.
  - b. All other necessary verifications are in place.

## **CONTRACTOR ENGAGEMENT**

### **Steps 10-14 / Forms 4-8**

10. If the Executive Agency or Contractor wants to modify the TO Form, they must complete [Form 5: Task Order Modification Request Form](#).
11. If the Executive Agency has any issue with a Contractor they must complete [Form 6: Authorized User Issue Form](#).
- a. HBITS Team reviews and has final say on any issue.
  - b. All issues must be submitted in writing by completing Form 6. Issues cannot be submitted via phone call.
12. If a Contractor has any issue with an authorized user they must complete [Form 7: Contractor Issue Form](#)
- a. HBITS Team reviews and has final say on any issue.
  - b. All Issues must be submitted in writing by completing Form 7. Issues cannot be submitted via phone call.
- 1) Contractor sends monthly invoices directly to the OGS Business Services Center ([bsc.ogs.ny.gov](http://bsc.ogs.ny.gov)). In addition, the Contractor must also complete Form 8: Monthly Report (<http://ogs.ny.gov/BU/PC/hbits/form8.pdf>) and submit it to the HBITS Team for verification.
- a. If the HBITS Team finds a discrepancy, it is reviewed with the Agency and the Contractor. If an error is identified, it is adjusted in the next month's payment. OGS Finance will then work with the Agency to recoup payment.
13. Upon the end of the consultant engagement, the Executive Agency completes [Form 4: Task Order Satisfaction Form](#) and submits to HBITS Team.

## **ANNUAL CONTRACTOR EVALUATION**

### **Step 15 / Form 9**

14. On an annual basis, the HBITS Team completes [Form 9: Contractor Performance Evaluation Process](#). Based on the outcome of the Performance Evaluations, the five lowest scoring Contractors will be removed from the active Contractor list and the five Contractors on the wait list will be placed on the active Contractor list. For a listing of Active/Waitlisted Contractors, please visit: <http://ogs.ny.gov/BU/PC/hbits/docs/contractorstatus.pdf>.