

## ON HBITS FORMS

### Form 1 - Task Order Request Form (for use by executive and non-executive agencies)

**Q What are the necessary approvals before an Agency can begin the HBITS process of filing Form 1: Task Order Request Form?**

**A** The following approvals should be in place prior to filing Form 1. Agency authorized approvals, Office of Information Technology Services Plan to Procure (PTP), Division of Budget (DOB), and Federal applications if necessary.

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**Q Can you explain the new HBITS Job Category/Title Structure?**

**A** As defined in the Vendor Contract as Appendix D - Pricing Schedules, Worksheet #5 -Job Title Definitions, these sheets show the job category/titles for HBITS. These titles are broken into Service Group 1 - Standard Titles and Service Group 2 - Software/Hardware Specific Titles. Please note that these titles/Service Groups are not a controlling factor in placement. Agency need will be determined by qualifications, skill level, and demand.

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**Q What does it mean that Mandatories cannot be changed or added?**

**A** Mandatories are the qualifications for each title as predetermined by the Contract. They are Pass/Fail. Agencies cannot add additional Pass/Fail qualifications for any position.

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**Q Who assigns "Points Assigned for Meeting Qualifications"? Is this predetermined?**

**A** The points assigned for meeting each qualification are assigned by the Agency. The Agency can determine the value for each qualification as long as the total of the maximum points for all qualifications equals 80.

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**Q Are there field limitations in text fields?**

**A** There are no limitations on character text fields.

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### Form 2 - Candidate Response Form (for use by contractors)

**Q What type of detailed description are they asking for on the qualifications?**

**A** Contractors are not allowed to type "See Resume" in response to how a candidate meets a qualification. They must explain specifically how the qualification is met. A candidate will receive a score of 0 points if "See Resume" is written in the box. OGS will not review resumes to determine if the person actually meets the qualifications.

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**Q Once the OGS HBITS Team receives the completed Form 2 from the Contractors, does OGS forward all qualified Candidate Response Forms to the requesting Agency?**

**A Executive Agency Response:** No. The number of Form 2's submitted to the Agency depends on the number of qualified responses received. The OGS HBITS Team checks the mandatory qualifications for the title to confirm the candidate is valid.

If so, the HBITS Team uses the following methodology to determine the number of qualified Candidate Response Forms to be passed on to the Executive Agency Authorized User for each position sought.

- More than 10 qualifying responses received - 50% of the Candidate Response Forms with the lowest Hourly Bill Rates + are forwarded. If the 11th responses Hourly Bill Rate is within 1% of the highest Hourly Bill Rate within that 50% group 10th Hourly Bill Rate, that Candidate Response Form would also be forwarded.
- 6 - 10 qualified responses - Candidate Response Forms with 5 lowest Hourly Bill Rates are forwarded. If the 6th lowest Hourly Bill Rate is within 1% of the 5th lowest Hourly Bill Rate, that Candidate Response Form would also be forwarded.
- 5 or less qualified responses - OGS discretion as how to proceed.

**Non-Executive Agency Response:** All Form 2's submitted by the Contractors are passed onto the Non-Executive Agency without the HBIT's validation, the mandatory qualification(s), or review of the above methodology. It is the Agency's responsibility to process the Form 2's received per the Contract Terms (Section 2.2.2).

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### Form 3A - Authorized User Preliminary Technical Evaluation Form (for use by executive and non-executive agencies)

**Q Is scoring of qualifications at the agency's discretion?**

**A** Yes, scoring of qualifications is at the agency's discretion provided that points do not exceed the maximum points. In the event scoring is inaccurate, OGS will return the form for agency correction. This will add additional time to the process.

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**Form 5 - Task Order Modification Request Form (for use by executive and non-executive agencies)**

**Q** Is the same form used for both the agency and the contractor?

**A** Yes. The Task Order Modification Request Form and be used by either the agency or the contractor. However, it is subject to final approval by OGS HBITS team for Executive Agency Task Orders. For Non-Executive Agency Task Orders, it is subject to final approval by the Non-Executive Agency.

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**Q** In the "Additional Information Request" Section of Form 1, explain the "additional training" question. Is this training the Agency would give to the consultant? Or, training the consultant would give to Agency staff?

**A** Refer to Section 6.3.10 #4 of the Contract, Additional Requirements from Authorized Users.

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**Q** In the "Additional Information Request" Section of Form 1, please confirm the understanding of "knowledge transfer"? Specifically, is it knowledge transfer from the consultant to the Agency during and/or at the conclusion of the work effort?

**A** Reference to the Contract, Definitions "Knowledge Transfer" (page 6) generally describes method(s) to provide the knowledge, skills, training and expertise to the Authorized User to enable him/her to do the work independently if the Consultant was no longer available. Also refer to Section 6.3.10 #5 of the Contract, Additional Requirements from Authorized Users.

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**Q** What are some examples in using HBITS Form 5: Task Order Modification Request?

**A** Examples include, but are not limited to, a candidate duration change (i.e., 12 months reduced to 6 months); or, a candidate is leaving or needs to be replaced.

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**Q** What are some examples of the issues that a contractor/consultant might raise using Form 7: Contractor Issue Form?

**A** One example would be, but not limited to, if an Agency is not following the contractual agreement as outlined in Section 6.5 Authorized User Requirements.

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**FOR AGENCIES**

**Q** What are the differences between an Executive Agency and a Non-Executive Agency?

**A** Executive Agency shall mean all state departments, offices or institutions but, for the purposes of this Contract, such definition excludes the State University of New York (SUNY) and the City University of New York (CUNY). Furthermore, such term shall not include the legislature and the judiciary organizations. For the sake of clarity, the term "Executive Agency" does not include any public benefit corporation, public authority, or local government entity.

Non-Executive Agency shall mean all Authorized Users that are not included within the definition of Executive Agency; e.g., municipalities within the State of New York.

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**Q** Who are the Awarded Contractors?

**A** At this time, 23 Contracts have been awarded to: Artech Information Systems, CGI Technologies and Solutions Inc., CMA Consulting Services, Computer Aid Inc., Computer Technology Services Inc., Experis US Inc., GCom Software Inc., Genesys Consulting Services, Inc., IIT Inc., Infpeople Corporation, Knowledge Builders Inc., Logic House Ltd., Logic Technology Inc., MVP Consulting Plus Inc., NTT Data Inc., Precision Task Group Inc., PSI International Inc., QED Inc., Software People Inc., System Edge (US) LLC, Tempositions Inc. d/b/a/ Compuforce, Universal Technologies LLC, and, US Tech Solutions Inc.

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**Q** What if no one meets the qualifications the Agency needs?

**A** OGS will review the Agency qualifications identified to ensure that the submission is properly filed. Although emerging technologies will always be an issue, the network of contractors and sub-contractors that will be involved in this contract cover a vast area of knowledge in the latest technologies. In the event there are no valid candidates

meeting Agency specific qualifications, qualifications listed should be reviewed to ensure they are properly explained.

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**Q What if an Agency submits a request and there are no candidates submitted?**

**A** OGS will review the qualifications listed should be reviewed to ensure they are properly listed.

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**Q Are the qualifications and weighted scores predetermined?**

**A** No. Qualifications and weighted scores are determined by the Agency. As long as the maximum points total 80, the points assigned can change depending on the request and the number of qualifications submitted.

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**Q Can additional mandatories be added?**

**A** No. The mandatories are the qualifications for the titles and as specified in the contract. They are scored as Pass /Fail.

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**Q What if travel is required to field offices/remote locations?**

**A** Travel is no longer part of the hire rate for a contractor. The agency will handle travel as it would for any other staff. Travel, meals, and lodging will follow OSC Travel Guidelines. Reimbursement will be made by the Agency.

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**Q Are there any penalties for not meeting established time requirements for interviews?**

**A** There are no defined penalties. However, time established is intended for the benefit of the Agency. Using additional time may result in losing potentially preferred candidates resulting in the interview process starting again. It is recommended that State agencies do not submit more Tasks (Form 1) into the process than they can handle.

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**Q What if an Agency has its own service levels?**

**A** Although an Agency may have its own service levels, the HBITS contract has identified specific titles within these levels. Therefore, an Agency's service levels cannot be met under these guidelines.

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**Q What if an Authorized User or Contractor has issues or problems they would like to report?**

**A** HBITS Forms 6 and 7: Authorized User and Contractor Issue Forms are designed to capture all the necessary information. This form must be completed and forwarded to allow the problem/issue to be adequately addressed. Problems/issues received by phone or e-mail content will not be formally reviewed or addressed.

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**Q Who schedules candidate interviews?**

**A** Interviews will be scheduled between the Agency and the Vendor Contract Administrator within 5 days. The Agency identifies the proposed interview dates and times.

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**Q Once a candidate is selected, when can we anticipate their arrival?**

**A** A Contractor has ten (10) business days to perform all candidate placement requirements and finalizes onboarding of consultant(s). It may be mutually agreed between the Agency and the Contractor that the selected candidate's start date be outside that 10 day window as long as all requirements are met within the 10 days.

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**Q Can we use acronyms in filing forms and correspondence?**

**A** It is preferred that acronyms are not used. In the event that they are referenced, it is recommended that the definition is provided up front (i.e. "Office of General Services (OGS)").

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**Q Can forms be processed and submitted using mobile devices?**

**A** No, not at this time.

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**Q Are the processing days that are reflected for each step in calendar days or business days?**

**A** The number of processing days referenced are in business days.

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**Q What is the standard number of hours in a year that HBITS recommends?**

**A** Generally an agency should not budget more than 2000 Hours for a Full Time placement, but the final number used is at the Agency's discretion.

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**Q If I have one position to fill, do I have to decide ahead of time how many people I will interview?**

**A** The decision on how many Candidates to interview is made by the Agency after their completion of Form 3B: Authorized User Interview Evaluation Form for each candidate received and the Summary Sheet ranking all their technical scores. The Agency would then forward the Summary Sheet back to OGS indicating which candidates were selected for interview and those candidates that were not selected. Any non-selected candidates will be released and not be able to be recalled. If an Agency does not select a candidate from those interviewed, the entire process would have to start over.

Please note, a selection of a final candidate based on the highest technical and interview scores cannot take place until all interviews are completed. For example, if an Agency indicates that they wish to interview 8 Candidates, the Agency cannot decide after interviewing #6 that they wish to select that candidate and not interview #7 and #8.

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**Q Can our submitted bill rate for each individual task order (Service Group/Job Title) be lower than our awarded bill rate for that giving task order (Service Group/Job Title)?**

**A** No. A Contractor cannot fluctuate bill rates for a Service Group/Job Title based on Task Order. The awarded bill rate is the only rate allowed and used for comparing financials. For example, if a Contractor's bill rate for a Service Group/Job Title is \$60, that is the rate used for the Financials portion on any and all Task Orders for that position submitted by the Contractor. See Contract Section 2.3 Hourly Rates - "Hourly Bill Rates are not negotiated at the time of placement. A Contractor may only modify its Hourly Bill Rates via a formal amendment to this Contract."

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**Q Is it possible that we can get a copy of the pricing schedules in Excel format?**

**A** At this time, we are unable to provide Excel copies of the Pricing Schedules. Current Individual Contractor's Hourly Bill Rates are posted within Appendix D for each job title/demand/ region. I would suggest that an Agency only obtain the information for the specific job title/demand/region that you are currently working on to prevent using outdated information in future submissions.

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**Q The threshold for a PTP is \$50,000. Do I still need to get a PTP approval when the contract value is less than \$50,000?**

**A** PTP is not required for any technology services under \$50,000. For complete details refer to the NYS Information Technology Services at <http://www.its.ny.gov/ptp>

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**Q I am putting together a PTP and B-1184 for submission of a contractor position. I see the contract pricing for all of the vendors on your website. In order to estimate a price for the PTP/B-1184, which vendor price should be used? Is there a combined average price somewhere?**

**A** Please note that HBITS cannot provide a recommendation regarding which rate to use for the PTP/B-1184 approvals. We would suggest that you reach out to your finance office to inquire as to what figures to use as there is no "combined average rate" established for the Contract.

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**Q If we have a contract expiring after 3/31/13, will we be required to cancel the contract early and rebid through HBITS or will we be allowed to continue the contract until the expiration date and then use HBITS?**

**A** The HBITS Contracts do not cancel existing Contracts, but rather would be the replacement vehicle when your contract expires.

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**Q I attended the HBITS training yesterday and OGS staff stated if an Agency has a consultant contract that expires prior to 12/31/12, that the Agency is authorized to pursue a short term extension thru 3/31/12. In addition, OGS stated that for consultant contracts that expire 12/31/12, Agencies can request extensions (based on knowledge transfer, etc.) even though HBITS is available for our use?**

**A** Please note that OGS HBITS Team did not, and cannot, provide any authorization regarding whether or not to extend a Contract. **Approval to extend current ITS contracts is with the Agency, Cluster CIO, and DOB.**

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#### **FOR NON EXECUTIVE AGENCIES**

**Q** Can a not-for-profit entity apply to become an eligible purchaser through HBITS?

**A** Please note that per Section 5.10 of the Contract, "New York State political subdivisions and others authorized by New York State law may participate in centralized contracts established by OGS. These include, but are not limited to local governments, public authorities, public school and fire districts, public and nonprofit libraries, and certain other nonpublic/nonprofit organizations. See State Finance Law §163(1) (k) and Appendix B, §39 Participation in Centralized Contracts. " We would recommend that the organization contact [OGS' Customer Services Unit](#) to verify their eligibility to purchase from a NYS Contract.

Please refer to Section: 2.2.2 HBITS Process for Non-MSP (Non-Executive Agency) Users for directions/instructions for the Non-Executive Agency Process.

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#### **FOR CONTRACTORS**

**Q** What is the Contractor Performance Criteria?

**A** A Contractor will be annually evaluated on its performance of contractual duties. By doing so, the State seeks continued performance and quality Candidates from its Contractors throughout the life of the Contract. Complete Contractor Performance Criteria is located in Section 6.4 of the Contract.