

HBITS Agency How to Guide 1: The HBITS Form Process

THE CANDIDATE SELECTION PROCESS

Steps 1-9 / Forms 1-3B

1. Prior to completing Form 1: Task Order Request Form, the Agency must have all Agency approvals (internal, PTP, and B-1184) and Federal Approvals if applicable.
2. The Agency completes **Form 1: Task Order Request Form (TO)** and then forwards to the HBITS Team at 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 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.
5. The HBITS Team reviews the responses, validates mandatory requirements for HBITS title, reviews the requested qualifications, ranks candidates based on hourly rate, and releases candidate Form 2's to the Agency. Allow 1-2 days for processing.
6. 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. 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. Agency schedules interviews (at minimum, top 3 candidates must be interviewed). Agency interviews selected candidates to validate initial scores and qualifications. The Agency then completes **Form 3B: Authorized User Interview Evaluation Form** for all interviewees. Allow 2-5 days for processing.
 - a. Agency must include rationale when changing any qualification score.
 - b. Agency selects the highest technically scored candidate(s) after interviews.
 - c. Agency updates the HBITS Team of candidate(s) selected, all remaining candidates are released.
 - d. Agency works with contractor to set up start date with consultant.
8. The HBITS Team ensures that all forms have been completed by the Agency and the Contractor, and properly entered into the database.
9. Contractor performs all candidate placement requirements and finalizes on-boarding of consultant. Allow 10 business days for processing.
 - a. Necessary background checks.
 - b. All other necessary verifications are in place.

CONTRACTOR ENGAGEMENT

Steps 10-14 / Forms 4-8

10. If the Agency or Contractor wants to modify the TO Form, they must complete [Form 5: Task Order Modification Request Form](#).
 - a. HBITS Team oversees and has final approval over any such request.
11. If the 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.
13. Contractor sends monthly invoices to OGS Finance. In addition, Contractor completes [Form 8: Monthly Report](#) and sends to HBITS Team for verification.
 - a. The HBITS Team receives invoices and Form 8 from each contractor and validates both against Task Orders and Form 8.
 - b. If a discrepancy is found, the HBITS Team reviews with Agency and Contractor. If an error is identified, it is adjusted in the next month's payment.
 - c. OGS Finance will then work with Agency to recoup payment.
14. Upon the end of the consultant engagement, Agency completes [Form 4: Task Order Satisfaction Form](#) and submits to HBITS Team.

ANNUAL CONTRACTOR EVALUATION

Step 15 / Form 9

15. 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.