

## HBITS Agency How to Guide 2

### Form 5: Task Order Modification Request

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#### **THE CANDIDATE REPLACEMENT PROCESS**

Contract Reference Section 6.5.4. Consultant Replacements

NOTE: Label correspondence SUBJECT lines as: HBITS-01-00# FORM 5 – Candidate Replacement

1. The State Agency will contact the vendor to discuss the replacement and make all the arrangements to follow through with the process.
2. The Contractor will provide the State Agency with original Form 2's for the specific HBITS request. Candidates must meet or exceed ALL Requested Qualifications from the original Task Order. The HBITS Team recommends that the State Agency request a minimum of three candidate Form 2's for review and consideration.
3. The State Agency will process the Form 2's in the same manner as they would for an original candidate request. (Form's 3A and 3B process)
4. Upon selection of the replacement candidate, the State Agency will provide the HBITS Team with the:
  - a. [Form 5: Task Order Modification Request](#)
    - Note: Per the Contract terms, the Contractor is required to submit the Task Order Modification Request Form 5 to HBITS. However, the State Agency has the option to prepare the Form 5 if they prefer to be descriptive in the changes. In this event, they would send the form to the HBITS mailbox with a cc to the Contractor.
  - b. Candidate Form 2's and, if provided, resumes and other attachments.
  - c. 3A Candidate Technical Evaluation(s) and Summary Sheet.  
(The Summary Sheet is not necessary if there is a single candidate.)
  - d. 3B Candidate Post Interview(s) and Summary Sheet.  
(The Summary Sheet is not necessary if there is a single candidate.)
  - e. Onboard determination to include:  
(For your convenience, a table is provided below to assist in this task.)
    - 1) Previous candidate information (for invoicing purposes):
      - a) Name
      - b) Onboard date
      - c) Notice given date
      - d) End date

- 2) Replacement candidate:
  - a) Name
  - b) State date
- 3) And, whether the Agency is requesting or waiving their right as outlined in Contract Sections 6.5.4.1 and 6.5.4.2 - "...the Authorized User has the right to receive up to two working weeks (80 hours) of work from the replacement Consultant, at no cost to the Authorized User, during a transition/ramp-up period."
  - a) In the event the Agency is requesting this right, include the final vendor correspondence confirming the agreement including the number of hours agreed upon.
- f. Or, notice of cancellation with the submission of a complete Form 5.
  - 1) Note, any documentation gathered in this process would be included with the Form 5 cancellation request.
- 5. All Form 5 requests are subject to HBITS approval. Once approved, a signed Form 5 will be forwarded to the State Agency and the Vendor.

**(Please note the above process is subject to change based on the need of each request.)**

As referenced above, for the convenience of State Agencies, please provide the following within the e-mail in addition to the information requested above.

PREVIOUS CANDIDATE	
Name:	
Onboard Date:	
Notice Given Date:	
End Date:	

REPLACEMENT CANDIDATE	
Name:	
Start Date:	

SECTION 6.5.4.1 and 6.5.4.2 (up to 80 hours) (Specify YES or NO)	
Requested:	
Documentation Included:	
Waived:	

## **THE TASK ORDER CANCELLATION PROCESS WITH CANDIDATE ONBOARD**

Contract Reference Section 5.3.2.1 Appendix B Amendments (e)

NOTE: Label correspondence SUBJECT lines as: HBITS-01-00# FORM 5 – Onboard Cancellation

1. The State Agency retains the right to cancel a Task Order for convenience upon at least thirty (30) calendar days written notice to the Vendor. CC the HBITS mailbox with this notification to the vendor.
2. Upon receipt of such notice, the State Agency can contact the vendor to determine a suitable candidate end date.
3. Upon determination of a candidate end date, the State Agency will provide the HBITS Team with the:
  - a. Form 5: Task Order Modification Request
    - Note: Per the Contract terms, the Contractor is required to submit the Task Order Modification Request Form 5 to HBITS. However, the State Agency has the option to prepare the Form 5 if they prefer to be descriptive in the changes. In this event, they would send the form to the HBITS mailbox with a cc to the Contractor.
  - b. Cancellation candidate:
    - 1) Name
    - 2) End date
4. All Form 5 requests are subject to HBITS approval. Once approved, a signed Form 5 will be forwarded to the State Agency and the Vendor.

**(Please note the above process is subject to change based on the need of each request.)**

## **CHANGES IN CANDIDATE STATUS**

Contract Reference Section 5.2 General Requirements

NOTE: Label correspondence SUBJECT lines as: HBITS-01-00# FORM 5 – TO Change

1. Any relevant changes in a candidate's status (schedule change, change in visa status, etc.)
2. The State Agency will provide the HBITS Team with the:
  - a. Form 5: Task Order Modification Request
    - Note: Per the Contract terms, the Contractor is required to submit the Task Order Modification Request Form 5 to HBITS. However, the State Agency has the option to prepare the Form 5 if they prefer to be descriptive in the changes. In this event, they would send the form to the HBITS mailbox with a cc to the Contractor.
3. All Form 5 requests are subject to HBITS approval. Once approved, a signed Form 5 will be forwarded to the State Agency and the Vendor.

**(Please note the above process is subject to change based on the need of each request.)**