



**Office of  
General Services**

# HBITS Contractor Training

July 25, 2019



@NYSPro



@nysprocurement

# General Information

- Questions may be submitted by email during this webinar to [HBITS.Contractors@ogs.ny.gov](mailto:HBITS.Contractors@ogs.ny.gov).
- At the discretion of OGS, we may address questions submitted both in advance of and during this webinar at the end of the presentation.

# Old Business

## Incumbent vendors

### Current vendors with existing placements:

- Placements will continue until the end of their original term and will continue under the terms and conditions of the original contract.
- Invoices for those placements must be separate from the new contract invoices.
- Replacements on existing placements will continue through the end of the original term and will continue under the terms and conditions of the original contract.

# New Business

- Welcome to HBITS 2019!
- All new task orders sent out after July 1, 2019 will be covered under the terms of the new contract.
- All task order responses (Form 2s) must be on the new forms.

# Attachment 7 – HBITS Process

- Attachment 7 lays out the entire HBITS process. It contains tips and important information throughout.
- Contractors should read and understand this attachment completely.
- [https://online.ogs.ny.gov/purchase/snt/awardnotes/7301223158Attachment07\\_Process.pdf](https://online.ogs.ny.gov/purchase/snt/awardnotes/7301223158Attachment07_Process.pdf)

# Form 2 Completion and Submission

- Detailed Form 2 instructions can be found at:  
<https://ogs.ny.gov/procurement/23158-hbits-form-2-instructions>
- Let's review Attachment 7 Sections 1.1 through 1.3:
  - How the OGS HBITS Team distributes task orders to active contractors (Forms 1 and 2)
  - Contractor completion of Form 2
  - Contractor submission of Form 2



# Things to Remember

- If the Form 1 allows for multiple positions and/or more than one Form 2 may be submitted for a position, you must submit each Form 2 in its own email.
- Each email must contain the following information in the subject line:

Task Order # HBITS-0X-1XXXX “VendorShortName-CandidateLast Name”

- Example: HBITS-01-10050 ABC-Smith

- Mislabeled emails may be rejected without notice or review.



# Things to Remember (cont'd)

- The body of the email must contain the candidate's full name.
- So we can clearly understand which Form 2(s) should be considered, provide detailed information if
  - you are submitting a different candidate for consideration, or
  - if you are withdrawing the candidate for consideration, etc.



# Things to Remember (cont'd)

All attachments must be labeled as follows:

Example using Vendor #30 ABC Company Task Order #HBITS-01-10050

- Form2\_HBITS-0X-1XXXX\_(Vendor#ShortName)\_Candidate Last Name
  - Example: Form2\_HBITS-01-10050\_30ABC\_Smith
- Resume\_HBITS-0X-1XXXX\_(Vendor#ShortName)\_Candidate Last Name
  - Example: Resume\_HBITS-01-10050\_30ABC\_Smith
- Att#1\_HBITS-0X-1XXXX\_(Vendor#ShortName)\_Candidate Last Name
  - Example: Att1\_HBITS-01-10050\_30ABC\_Smith



# Form 2 Review to Candidate Selection

Let's review Attachment 7 Sections 1.4 and 1.5

- OGS HBITS Team preliminary review
- Agency evaluation and candidate selection



# Candidate Placement Requirements

Let's review Attachment 7 Sections 1.6 and 1.7

- Pre-submission Requirements
- Requirements during the Engagement



# Candidate Replacements (Form 5)

Let's review Attachment 7 Section 1.8

- If a need arises to replace a candidate:
  - The original term of the engagement does not get extended.
  - Contractor must respond in the format of the original Form 2 candidate submission requirements.
  - There are two types of replacements:
    1. Rapid Replacement (< 1 Month)
    2. Steady Replacement (> 1 Month)

# Annual Contractor Evaluation

- Each year, each contractor will receive an annual evaluation using the criteria as stated in Attachment 7, Section 1.10. We will review this in detail.
- Your score will be dependent on your ability to follow the direction in Attachment 7, in two parts:
  - Part 1:
    - Contractor Responsiveness
    - Successful Onboarding
  - Part 2 :
    - Compliance Review
    - General Quality
    - Authorized User Evaluation



# Active vs. Inactive

- The OGS HBITS Team will maintain a listing of active and inactive contractors throughout the term of the contract.
- Status is based upon the results of the annual evaluation as defined in Attachment 7 Section 1.10.2.

# Contractor Invoice

- The process for invoicing for HBITS services is different for executive agencies and nonexecutive agencies.
- Definitions can be found in Section 1.5 of the contract.
- Invoices for expenses must have the prior approval of the agency and shall be invoiced directly to the agency (see Attachment 7 Section 1.9.9-Terms and Conditions for Travel, Meals and Lodging).

# Contractor Invoice – Executive Agencies

- Payment for services is the sole responsibility of OGS.
- Only 1 invoice per month may be submitted. Revised invoices should only be submitted if requested to do so.
- Must be submitted electronically
  - TO: [ogs.sm.accountspayable@ogs.ny.gov](mailto:ogs.sm.accountspayable@ogs.ny.gov)
  - CC: [ogs.sm.sst\\_payment\\_processing\\_lockbox@ogs.ny.gov](mailto:ogs.sm.sst_payment_processing_lockbox@ogs.ny.gov)
- Must be submitted by the 15<sup>th</sup> of the following month for the prior month's services.
- Required adjustments shall be included on the next monthly invoice cycle.



# Contractor Invoice – Executive Agencies (cont'd)

- Must contain the following data elements in the header:
  - Unique Invoice Number
  - Invoice Date
  - Contract Number PH68####
  - Purchase Order XXXX (to be provided)
  - Unit ID Number 268050
  - Period Covered
  - Bill to Address:
    - NYS Office of General Services
    - HBITS Billing
    - Business Services Center, Accounts Payable



# Contractor Invoice – Executive Agencies (cont'd)

- Each specific agency shall include all task orders grouped together and sub-totaled for each specific agency.
- For additional information, refer to Section 2.6.1-Method of Payment for Executive Agency Authorized Users of the Contract.

# Contractor Invoice – Sample

## Contractor Invoice – Sample

**Company ABC**  
 123 Main St.  
 City, State, 12345

**Invoice Number:** #####  
**Invoice Date:** 07/23/2019  
**Contract Number:** PH686##  
**Purchase Order Number:** ####  
**Unit ID Number:** 268050

**Bill to:**  
 NYS Office of General Services  
 HBITS Billing  
 Business Services Center, Accounts Payable

**Period Covered:** June 1, XX – June 30 XX

<b>Agency – Office of Information Technology</b>	
1. John Smith	
Position: Programmer	
<b>Task Order:</b> HBITS-01-10015	
100 Hours * 60.00 = \$6000.00	
5 Hours * 60.00 = \$300.00 (Correction from May Billing Period)	
2. Mary Brown	
Position: Business Analyst	
<b>Task Order:</b> HBITS-01-10004	
110 Hours * 65.00 = \$7150.00	
	<b>\$13450.00</b>
<b>Agency – Office of Information Technology - Federal</b>	
1. Timothy Sanders	
Position: Programmer	
<b>Task Order:</b> HBITS-01-10001	
68 Hours * 55.00 = \$3740.00	
	<b>\$3740.00</b>
<b>Agency – Department of Health</b>	
1. Sarah Jones	
Position: Technical Architect	
<b>Task Order:</b> HBITS-01-10077	
59 Hours * 68.00 = \$4012.00	
	<b>\$4012.00</b>

**Total Due:** **\$21202.00**



# Contractor Invoice – Nonexecutive

- Payment for services is the responsibility of the nonexecutive agency.
- Invoices shall be submitted directly to the nonexecutive agency and contain the minimum information as per Section 2.6.2-Method of Payment for Nonexecutive Agency Authorized Users of the contract.



# General Things to Remember

- This is a fixed-price contract. The hourly bill rate in effect at the time OGS sends the task order for response will be the bill rate in effect for the entire duration of the task order.
- Please review Section 2.4-Pricing and 2.5-CPI Rate Adjustments within the contract carefully. No additional price modifications are allowed during the term of this contract.
- You must pay the selected candidate a minimum of the hourly wage rate specified in Attachment 1-Pricing Schedule. Failure to do so violates the contract and may result in the completion of a Form 6-Authorized User Issue Form or an audit of your company per Section 2.29-Audit of Contractor.

# General Things to Remember (cont'd)

- Per Section 2.9-Contract Administration, it is up to the contractor to ensure all contact information is up to date. Please email us with any changes to the contractor information appearing on our website at <https://online.ogs.ny.gov/purchase/snt/awardnotes/7301223158ContractorInfo.pdf> and/or any changes needed to Attachment 2-Contractor Information.
  - Form 1s will be sent via email to the contract administrator and secondary contact emails indicated on Attachment 2.

# General Things to Remember (cont'd)

- Please refer to Section 2.27 Non-Compete Agreements of the contract for rules in regards to HBITS candidates.
- Please refer to Section 2.28-Subcontractors of the contract for information about subcontracting rights and responsibilities.



# We're Here to Help!

## Hourly Based IT Services (HBITS):

For Contractors: [HBITS.Contractors@ogs.ny.gov](mailto:HBITS.Contractors@ogs.ny.gov)

For State Agencies: [HBITS.StateAgencies@ogs.ny.gov](mailto:HBITS.StateAgencies@ogs.ny.gov)

For Nonexecutive Agencies: [HBITS.NonExecutiveAgencies@ogs.ny.gov](mailto:HBITS.NonExecutiveAgencies@ogs.ny.gov)

For HBITS Invoicing: [ogs.sm.sst\\_payment\\_processing@ogs.ny.gov](mailto:ogs.sm.sst_payment_processing@ogs.ny.gov)