**Appendix II - Contractor’s Desk Reference for HBITS Award #23158 (Summaries) – 8/11/2021**

The information provided in this document is meant to assist Contractors with their performance under Award #23158 and is not all-inclusive.

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## **Summary of Due Dates**

### Annual Evaluation Dates Chart

|  |  |  |  |
| --- | --- | --- | --- |
| **YR** | **Contract Dates** | **Evaluation Review Period** | **Evaluation Period End Date** |
| Y1 | 7/1/19-6/30/20 | 7/1/19 – 5/31/20 | 6/30/20 |
| Y2 | 7/1/20-6/30/21 | 6/1/20 – 5/31/21 | 6/30/21 |
| Y3 | 7/1/21-6/30/22 | 6/1/21 – 5/31/22 | 6/30/22 |
| Y4 | 7/1/22-6/30/23 | 6/1/22 – 5/31/23 | 6/30/23 |
| Y5 | 7/1/23-6/30/24 | 6/1/23 – 5/31/24 | 6/28/24 |

### 6 Month Evaluation Dates Chart

|  |  |  |  |
| --- | --- | --- | --- |
| **YR** | **Contract Dates** | **Evaluation Review Period** | **Evaluation Period End Date** |
| Y1 | 7/1/19-6/30/20 | N/A | N/A |
| Y2 | 7/1/20-6/30/21 | N/A | N/A |
| Y3 | 7/1/21-6/30/22 | 6/1/21 – 11/30/21 | 12/31/21 |
| Y4 | 7/1/22-6/30/23 | 6/1/22 – 11/30/22 | 12/31/22 |
| Y5 | 7/1/23-6/30/24 | 6/1/23 – 11/30/23 | 12/31/23 |

### Monthly Invoices & Monthly Sales Report

Due by the 15th of the following month for the prior months’ services (regardless of whether the 15th falls on a weekend or holiday)

### MWBE Monthly Compliance Report

Must be entered into the NYSCS by the 10th of the month following the month being reported (regardless of whether the 10th falls on a weekend or holiday).

### Quarterly Sales Report, Quarterly Administrative Fee, Quarterly SDVOB Compliance Report

|  |  |  |
| --- | --- | --- |
| **Period Covered** | **Quarterly Sales Report and****Quarterly Administrative Fee** | **SDVOB Quarterly Compliance Report** |
| **Due Date** (regardless of whether the 15th falls on a weekend or holiday) | **Due Date** (regardless of whether the 10th falls on a weekend or holiday) |
| July 1 – September 30 | November 15th | November 10th |
| October 1 – December 31 | February 15th | February 10th |
| January 1 – March 31 | May 15th | May 10th |
| April 1 – June 30 | August 15th  | August 10th  |

### Annual Form B

Due no later than May 15th of each year (regardless of whether the date falls on a weekend or holiday).

### Vendor Responsibility

|  |  |
| --- | --- |
| **YR** | **VRQ Must Be Certified or Recertified Between Dates** |
| Y1 | 1/1/20 – 5/31/20 |
| Y2 | 1/1/21 - 5/31/21 |
| Y3 | 1/1/22 - 5/31/22 |
| Y4 | 1/1/23 - 5/31/23 |
| Y5 | 1/1/24 - 5/31/24 |

### CPI Rate Adjustments

|  |  |  |
| --- | --- | --- |
| **YR** | **Dates** | **Receive Requests for CPI** |
| Y1 | 7/1/19-6/30/20 | N/A |
| Y2 | 7/1/20-6/30/21 | 4/1/20- 5/31/20 |
| Y3 | 7/1/21-6/30/22 | 4/1/21- 5/31/21 |
| Y4 | 7/1/22-6/30/23 | 4/1/22- 5/31/22 |
| Y5 | 7/1/23-6/30/24 | 4/1/23- 5/31/23 |

## **How to Label Subject Line/Attachment(s)**

### Candidate Response Form Submittal

**Subject Line**: HBITS-0X-1XXXX Contractor Short Name-Candidate Last Name

Example: HBITS-01-10050 ABC-Smith

**Attachment Form 2**: Form2\_HBITS-0X-1XXXX\_Contractor#ContractorShortName\_CandidateLastName

Example*:* Form2\_HBITS-01-10050\_29ABC\_Smith

**Attachment Resume**: Resume\_HBITS-0X-1XXXX\_Contractor#ContractorShortName\_CandidateLastName

Example*:* Resume\_HBITS-01-10050\_29ABC\_Smith

**Additional Attachments**: Att#\_HBITS-0X-1XXXX\_Contractor#ContractorShortName\_CandidateLastName

Example*:* Att1\_HBITS-01-10050\_29ABC\_Smith

Example*:* Att2\_ HBITS-01-10050\_29ABC\_Smith

### Monthly

Executive Agencies Invoices – ePayments Submissions Only

**Subject Line & Attachment**: ContractorShortName\_Mo Yr \_ePayment\_23158

Example: ABC\_Sept 2019\_ePayment Invoice\_23158

Monthly Sales Report

**Subject Line & Attachment**: ContractorShortName\_Mo Yr \_MonthlySalesRpt\_23158

Example: ABC\_Sept 2019\_MonthlySalesRpt\_23158

### Quarterly

Quarterly Sales Report

**Subject Line & Attachment**: ContractorShortName\_Qtr Yr \_QuarterlySalesRpt\_23158

Example: ABC\_July-Sept 2019\_QuarterlySalesRpt\_23158

**Quarterly Administrative Fee**

ContractorShortName\_Qtr Yr\_AdminFee\_23158

**Example**: ABC\_July-Sept 2019\_AdminFee\_23158

SDVOB Quarterly Compliance Report

**Subject Line & Attachment**: ContractorShortName\_Qtr Yr \_SDVOBComplianceRpt\_23158

Example: ABC\_July-Sept 2019\_SDVOBComplianceRpt\_23158

### Annually

Form B

**Subject Line & Attachment:**ContractorShortName\_FormB\_YrX\_23158

Example: ABC\_FormB\_Y3\_23158

CPI

ContractorShortName\_YrX \_CPI Request\_23158

**Example**: ABC\_Yr1\_CPI Request\_23158

### Upon Request or As Needed

Good Faith Reporting Tool (MWBE & SDVOB)

**Subject Line & Attachment**: ContractorShortName\_PeriodCovered\_GoodFaithRpt\_23158

Example: ABC\_July 2019-June 2020\_GoodFaithRpt\_23158

SDVOB Utilization Plan 100

**Subject Line & Attachment**: ContractorShortName\_SDVOBUtilizationPlan\_23158

Example: ABC\_SDVOBUtilizationPlan\_23158