

APPENDIX F

HBITS PROCESSES AND FORMS



AGENCY

MSP (OGS)

CONTRACTOR

Agency completes a **Task Order (TO) Request Form 1**

Total Process Time: 23-25 business days
(All timeframes are in business days)

OGS reviews the request, validates all data fields and compliance with contractual terms, and posts on the **Contractor Bulletin Board** (for contractors only). (2-3 Days)

Contractors receive an automatic e-mail that a TO is posted. Contractors propose candidates using **Form 2**. (10 days/5 days expedited with HBITS Group pre-approval) *Does not include day of transmission to vendors.

Agency reviews the forms using **Form 3A** to determine the most technically qualified candidates to interview. Notifies OGS through portal of selected candidates for interview; all other candidates are released. Step by Step Procedures are below:
Part 1- 5 days
 • Form 3A is completed with initial score.
Part 2- 5 days
 • Agency schedules interviews (min. of 3 req.) but agency may interview more
 • Interviews to validate initial score and qualifications
 • Completes Evaluation Form 3B on all interviewees
 • Selects the highest technically scored candidate after interview
 • Updates the TO in the portal, releases remaining non-selected candidates
 • Work with Contractor to start the consultant

OGS reviews the responses, validates mandatory requirements from Contract are met, and releases appropriate responses to the Agency. (1-2 days)



OGS ensures the Contractor and the Agency have completed the process the forms in the database.

Contractor has **10 business days** to perform all Candidate placement requirements and finalizes onboarding of consultants.

OGS ensures the job has begun.

Agency can complete a **TO Modification Request Form 5**
 Agency can complete an **Issue Form 6**

OGS would approve and oversee either form

Contractor can complete a **TO Modification Request Form 5**
 Contractor can complete an **Issue Form 7**

HBITS Group receives the invoice and Form 8 from each contractor; validates both against the TOs and Form 8. If a discrepancy is found, HBITS group checks with agency and contractor. If error, adjusts next month's payment.

- Contractor sends an invoice to OGS Finance.
- Contractor completes a **Monthly Report Form 8** and sends to the HBITS group for verification-off

Job Completion –
 Agency completes **TO Satisfaction Form 4** and submits to HBITS Database

Annually –
 OGS completes **Contractor Performance Evaluation Form 9** and amends Contractor Lists

HBITS Form 1: Task Order Request Form

A maximum of five (5) candidates may be requested if all positions are for the same service group, job title, skill level/demand and position qualifications. OGS intends to develop a web-based version of this form which will be available through a portal. Accordingly, this form may change based on final development needs and identified fields below may be adjusted based on the authorized user and may not be applicable to all requests.

Request Date:	
Agency:	
Agency Contact Name:	
Agency Contact E-mail:	
Agency Contact Phone #:	

Has Agency received the necessary internal agency (management) approvals to support this Task Order Request (if applicable)?	
Has Agency received PTP approval from OITS to support this Task Order Request (if applicable)?	
Has Agency received DOB approval to support this Task Order request (if applicable)?	
Will Federal Funding be used to pay (in part or in full) for this position(s) (if applicable)?	
Is this a request for the NYS Department of Labor? See Section 5.23 of the Contract for additional details.	

Is this a Project or Program specific request (e.g., Connections, SFS)?	
If yes, please list the Project or Program Name:	
Please provide a short description of the project:	
Please provide a full listing of the day to day tasks to be performed by the Consultant (be descriptive and specific):	

Is this an expedited request (within 5 days)? <i>If Yes, please provide detailed justification in the box below. Expedited requests require written pre-approval and are at the sole discretion of the MSP. These requests are not and will not be commonplace. Expedited requests are not available for Non-MSP Users.</i>	
Justification:	
Is this a New or Incumbent request?	
Which Service Group is required?	
What is the number of staff being requested? (maximum of 5)	
Which Job Title Category is required?	
Which Skill Level is required?	
Which Skill Demand is required?	
How many Candidate Response Forms are being requested per Contractor per position?	

When is the Target Start Date? (auto rule of 30 Business Days minimum from date of request)			
How long is the engagement?			
When is the estimated completion date?			
Is this a Full or Part-Time Position (Full time is considered 40 Hours Per Week)?			
If Part-Time, enter approximate number of hours per week:			
What are the daily work hours? (note if negotiable or list preferred start and end time):			
Where is the Home Base Region? (Add link to Appendix E Region Definitions)			
Where is the work office located? Enter Building Name (if known) Full Street Address, City, and ZIP			
What type of software is typically used by the Agency? (e.g., Agency is an "IBM shop.")			
What type of hardware is typically used by the Agency? (e.g., Agency is a "Unisys shop.")			
Position Mandatory Qualifications			
(Insert Text From Contract for Position Title and Skill Level)		Pass/Fail	
<u>"Mandatory" Qualifications cannot be changed nor can additional "mandatory" qualifications be added</u>		<i>The number of qualifications requested, and the number of points assigned must total 80 points.</i>	
Qualification Number	Requested Qualifications	Points Assigned for Meeting Qualifications (Always 75% of Max Points)	Maximum Points Allowed for Exceeding Qualifications (80)
1.	Sample: X Months of Experience in Y doing Z	7.5	10
2.	Sample: X Months of Experience in Y doing Z	7.5	10
3.	Sample: X Months of Experience in Y doing Z	7.5	10
4.	Sample: X Months of Experience in Y doing Z	7.5	10
5.	Sample: X Months of Experience in Y doing Z	7.5	10
6.	Sample: X Months of Experience in Y doing Z	7.5	10
7.	Sample: X Months of Experience in Y doing Z	3.75	5
8.	Sample: X Months of Experience in Y doing Z	3.75	5
9.	Sample: Bachelor's Degree	3.75	5
10.	Sample: Project Management Professional Certification	3.75	5
Requested Qualifications Must Always Total 80 Points For Maximum Score		60	80
Interview Must Always Total		20	
Total Score		100	

Additional Information Requests:	
Are there additional security requirements for the Authorized User?	
Will additional training possibly be required during the Engagement?	
If Yes, provide description of anticipated training.	
What type, or manner, of Knowledge Transfer is requested during the engagement?	
Is travel anticipated during the Engagement?	
If Yes, please list anticipated frequency and locations for travel:	

**HBITS Form 2:
Candidate Response Form**

Date:				
Task Order #:				
Contractor Name:				
Should an individual other than the Contract Administrator/ Secondary Contact be contacted about this Candidate?				
If Yes, please provide the Contact Name for this Response:				
Contractor Phone #:				
Contractor E-mail:				
Is the proposed Candidate a US Citizen?				
If Yes, please list the full first name as depicted on the State Driver's license or governmental identification:				
If Yes, please list the full last name as depicted on the Driver's license or governmental identification:				
If No, please list the full first name as depicted on the Visa/ Passport. *No abbreviations or other derivations are allowed.				
If No, please list the full last name as depicted on the Visa/ Passport. *No abbreviations or other derivations are allowed.				
Visa #				
Type of Visa (e.g., L-1, H1-B)				
Candidate Full Name:				
Was a pre-interview of the conducted in accordance with Section 6.3.4 of the HBITS Contract? <i>*Failure to Perform Pre-Interview of Candidate will result in automatic rejection of Candidate.</i>				
If Yes, what date was the Pre-Interview conducted?				
Does the Candidate anticipate any absences during the engagement (See Section 6.3.8 of the HBITS contract)?				
If Yes, please list the start and end dates of each absence?				
Proposed Interview dates (Cannot be earlier than 7 business days after due date of requisition)				
Project:				
Service Group :				
Job Title(s) Category:				
Skill Level:				
Skill Demand Required:				
Home Based Region:				
Employment Status of Consultant:				
<u>Identify any and all subcontractors involved with the placement of the Candidate below:</u>				
Name	Address	Is subcontractor an M/WBE? (link to ESDC database)	Is subcontractor an SBE? (link to show definition of SBE)	Is this subcontractor paying Hourly Wage Rate for Candidate?

Appendix F

Mandatory Qualification	Pre-Defined: (Insert Text From Contract for Position Title and Skill Level)	Pass/Fail
Provide a detailed description of how the proposed Candidate meets the mandatory qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.		Leave This Cell Blank (Vendors Do Not Score)
<u>Qualification Number</u>	<u>Requested Qualifications:</u>	<u>Max Points Assigned</u>
1.	Sample: X Months of Experience in Y doing Z	10
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
2.	Sample: X Months of Experience in Y doing Z	10
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
3.	Sample: X Months of Experience in Y doing Z	10
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
4.	Sample: X Months of Experience in Y doing Z	10
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
5.	Sample: X Months of Experience in Y doing Z	10
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
6.	Sample: X Months of Experience in Y doing Z	10
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
7.	Sample: X Months of Experience in Y doing Z	5
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
8.	Sample: X Months of Experience in Y doing Z	5
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
9.	Sample: Bachelor's Degree	5
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
10.	Sample: Project Management Professional (PMP)	5
	Provide a detailed description of how the proposed Candidate meets the requested qualification. Include name(s) of previous employer(s), start and end dates of engagement(s), reference, and any additional applicable information.	Leave This Cell Blank
Requested Qualifications Must Total		80
Interview Must Total		20
Total Score		100

Appendix F

REFERENCES (Optional)				
	<u>Name</u>	<u>Company</u>	<u>Phone</u>	<u>E-Mail</u>
Reference #1 (Optional)				
Reference #2 (Optional)				
Reference #3 (Optional)				

Additional Information Requests:	
Can the proposed Candidate(s) meet the additional Security Requirements requested (Note All That Apply)?	
If Other is Selected, please provide relevant information:	
Can the proposed Candidate(s) meet the additional training possibly required during the Engagement?	
Can the Candidate meet the request type and manner of knowledge transfer requested during the engagement?	
Can the Candidate(s) meet the travel anticipated during the Engagement?	

*Resumes can be attached, in addition to the completed form.

**If education credentials were requested, Contractor must attached proof of degree equivalency as required by Section 6.3.3 of the HBITS contract

*** The Contractor's agreement to comply with the provisions of this form is a material representation of fact upon which reliance was placed when the Authorized User determined to enter into an engagement with the Contractor.

HBITS Form 3A:
Authorized User Preliminary Technical Evaluation Form

Candidate Specific Form: Please complete this form for each Candidate Response Form reviewed.

Date:	
Task Order #:	
Contractor Name:	
Candidate Full Name	
List any anticipated absences and the dates of such absences the Candidate may have during the engagement:	
Project:	
Service Group :	
Job Title(s) Category:	
Skill Level:	
Skill Demand Required:	
Home Base Region	

Additional Security Requirements for the Authorized User:	
If Other is listed, please provide relevant information:	
Additional Training Possibly Required During Engagement?	
If Yes, Provide description of anticipated training?	
Type or Manner of Knowledge Transfer requested during the Engagement:	
Is Travel anticipated during the Engagement?	
If Yes, please list anticipated frequency and locations for travel:	

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Scoring Criteria

- 1) Candidate Meets Qualifications- Assign score of 75% of Max Points
- 2) Candidate Exceeds Requested Qualification – Score Full Points Assigned. Enter Information in Comments Column detailing rationale for Exceeding Qualifications
- 3) Candidate Does Not Meet Requested Qualification – Score 0 Points. No partial points allowed for not meeting Requested Qualifications. Enter information in Comments Column detailing rationale for zero points given.

Requested Qualifications

<u>Qualification Number</u>		<u>Points Assigned for Meeting Qualifications (Always 75% of Max Points)</u>	<u>Points Assigned for Exceeding Qualifications (Max Points)</u>	<u>Candidate Score</u>	<u>Comments</u>
1.	Sample: X Months of Experience in Y doing Z	7.5	10		
2.	Sample: X Months of Experience in Y doing Z	7.5	10		
3.	Sample: X Months of Experience in Y doing Z	7.5	10		
4.	Sample: X Months of Experience in Y doing Z	7.5	10		
5.	Sample: X Months of Experience in Y doing Z	7.5	10		
6.	Sample: X Months of Experience in Y doing Z	7.5	10		
7.	Sample: X Months of Experience in Y doing Z	3.75	5		
8.	Sample: X Months of Experience in Y doing Z	3.75	5		
9.	Sample: Bachelor's Degree	3.75	5		
10.	Sample: Project Management Professional (PMP) Certification	3.75	5		
Total Points:		60	80		

HBITS Preliminary Technical Evaluation Summary Sheet

Summary Sheet: After completion of all the preliminary technical evaluations, please complete this form summarizing the results.

<u>Task Order Number</u>		<u>Date Of Completion</u>	
Candidates Selected for Interviews (minimum of three, maximum of 10 per position)			
*Must Interview Three (3) Highest Scoring Candidates Before Selecting a Lower Ranked Candidates			
<u>Candidate Ranking</u>	<u>Candidate Full Name</u>	<u>Contractor Name</u>	<u>Interview Requested?</u>
1.			(Yes/No)
2.			(Yes/No)
3.			(Yes/No)
4.			(Yes/No)
5.			(Yes/No)
6.			(Yes/No)
7.			(Yes/No)
8.			(Yes/No)
9.			(Yes/No)
10.			(Yes/No)
11.			(Yes/No)
12.			(Yes/No)
13.			(Yes/No)
14.			(Yes/No)
15.			(Yes/No)
16.			(Yes/No)
17.			(Yes/No)
18.			(Yes/No)
19.			(Yes/No)
20.			(Yes/No)

HBITS Form 3B:
Authorized User Interview Evaluation Form

Candidate Specific Form: Please complete this form for each Candidate interview conducted.

Date:	
Task Order #:	
Contractor Name:	
Candidate Full Name	
List any anticipated absences and the dates of such absences the Consultant may have during the engagement:	
Project:	
Service Group :	
Job Title(s) Category:	
Skill Level:	
Skill Demand Required:	
Home Base Region:	

Additional security requirements for the Authorized User:	
If Other is listed, please provide relevant information:	
Additional training possibly required during Engagement?	
If Yes, provide description of anticipated training?	
Type or manner of Knowledge Transfer requested during the Engagement:	
Is travel anticipated during the Engagement?	
If Yes, please list anticipated frequency and locations for travel:	
Did interviewee(s) change the interview date and time more than two times OR did not show up?	

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Scoring Criteria

- 4) Candidate Meets Qualifications- Assign score of 75% of Max Points
- 5) Candidate Exceeds Requested Qualification – Score Full Points Assigned. Enter Information in Comments Column detailing rationale for Exceeding Qualifications
- 6) Candidate Does Not Meet Requested Qualification – Score 0 Points. No partial points allowed for not meeting Requested Qualifications. Enter information in Comments Column detailing rationale for zero points given.

Requested Qualifications

Qualification Number	Requested Qualifications	Points Assigned for Meeting Qualifications (Always 75% of Max Points)	Points Assigned for Exceeding Qualifications (Max Points)	Candidate Score	Comments and/or Score Change Rationale
1.	Sample: X Months of Experience in Y doing Z	7.5	10		
2.	Sample: X Months of Experience in Y doing Z	7.5	10		
3.	Sample: X Months of Experience in Y doing Z	7.5	10		
4.	Sample: X Months of Experience in Y doing Z	7.5	10		
5.	Sample: X Months of Experience in Y doing Z	7.5	10		
6.	Sample: X Months of Experience in Y doing Z	7.5	10		
7.	Sample: X Months of Experience in Y doing Z	3.75	5		
8.	Sample: X Months of Experience in Y doing Z	3.75	5		
9.	Sample: Bachelor's Degree	3.75	5		
10.	Sample: Project Management Professional (PMP)	3.75	5		
Interview Score		20	20		
Total Points:		80	100		

Interview Score Criteria: (20 Total Points)

Part 1: Interview (15 Points)

Highly recommend (15): Candidate provided excellent responses to all interview questions. Candidate has firm grasp on the needs of the agency and appears to have the requisite skill set to successfully perform the duties of the position beyond the expectations of the Authorized User. Candidate should seamlessly fit within the office(s) and work environment of the Authorized User.

Recommend (10): Candidate provided satisfactory answers to all interview questions. Candidate understands the needs of the agency and would satisfactorily complete all tasks required of the candidate.

Do not recommend (0): Candidate was ill-prepared for interview; or Candidate's experience was overstated in the Form 3A submission; or did not understand the needs of the Authorized User; or failed to answer basic questions regarding the skills and experience required for this position.

Part 2: Communication Skills (5 Points)

Excellent (5): The interviewer could clearly understand the information provided by the Candidate without prompting or follow-up. The Candidate was able to clearly communicate his/her skills and experience in response to the questions posed by the interviewer. If selected, the Candidate will be able to effectively speak and interact with staff without assistance.

Average (3): The interviewer could understand the candidate; however, Candidate required a few instances of prompting. The Candidate was mostly able to communicate his/her skills and experience in response to the questions by the interviewer. If selected, the Candidate will be able to speak and interact with staff with minor, if any, assistance.

Poor (0): The interviewer could not understand the Candidate. The Candidate was unable to effectively communicate his/her skills. If selected, the Candidate would have difficulty speaking and interacting with staff without assistance from others.

Additional Justification (please complete if necessary):

****The completion of this information by the Authorized User is optional and it will not be scored.**

<i>Is Candidate able to work the estimated work hours?</i>	
<i>Is Candidate available for the duration of the Task Order?</i>	
<i>Is Candidate available on the Target Start Date?</i>	
<i>Is Candidate available to work at the job location?</i>	
<i>Was the Candidate aware of the Engagement location, daily work hours and job duration prior to the interview?</i>	

HBITS Post-Interview Summary Score Sheet

Summary Sheet: After completion of all the Candidate interviews, please complete this form summarizing the results.

<u>Task Order Number</u>					<u>Date:</u>		
<u>Candidate Ranking</u>	<u>Candidate Full Name</u>	<u>Contractor Name</u>	<u>Total Score</u>	<u>Candidate Selected for Position?</u>			
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							

HBITS Form 4: Task Order Satisfaction Form

Appendix F

This form should be completed upon completion of a Task Order for each Consultant assigned.

Task Order #:	
Agency:	
Job Title:	
Vendor Name:	
Vendor Contact Name:	
Vendor Contact Phone #:	
Vendor Contact E-mail:	
Assigned Staff Name(s):	
JOB/CONTRACTOR EVALUATION (max 100 points/5 per question):	
Yes = 5 points, No = 0 points, if N/A = 5 points	
1. The job was completed on time.	5
2. The Consultant work product met the Authorized User's expectations.	5
3. The qualifications of the Consultant, as represented at initial selection, were validated by the work performed during the Task Order.	5
4. The initial job scope of work did not change due to the negative actions of the Consultant(s).	5
5. The job had minimal disruptions.	5
6. I would hire the Consultant again.	5
7. The Consultant was responsive to added requests.	5
8. The Consultant did not have repeated lateness to the job; lateness is defined as late arrival to the agreed upon working hours with the Authorized User.	5
9. The Consultant was flexible to any changes requested by the Authorized User.	5
10. The knowledge transfer was in the manner requested by the Authorized User, it was effective and the remaining staff has a strong understanding of the project.	5
Sub-Total:	50
11. The Authorized User would recommend this Consultant for another position of similar qualifications.	5
12. The Consultant was respectful to the Authorized User's employees and property.	5
13. The Consultant met the qualifications and skill requested throughout the TO.	5
14. The Consultant kept us informed on work progress and/or problems.	5
15. The Consultant performed to expectations of the Authorized User.	5
16. The Consultant was responsive to inquiries in a timely manner.	5
17. The Consultant submitted the monthly report (hours worked) in a timely manner.	5
18. The Consultant was willing to work past normal work hours to complete the project.	5
19. The Consultant's time sheets were accurate to the best of our knowledge.	5
20. The Consultant complied with agency's work rules and policies.	5
Sub-Total:	50
Total:	100

HBITS Form 5: Task Order Modification Request Form

Change Form Request Date:	
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Task Order #:	
Agency:	
Job Title:	
Skill Level	
Skill Demand	
Vendor Name:	
Effective Date of Change:	
Vendor Contact Name:	
Vendor Contact Phone #:	
Agency Contact E-mail:	
Agency Contact Name:	
Agency Contact Phone #:	
Agency Contact E-mail:	
Agency has received the necessary approvals to support this Task Order Change Request (e.g., Agency, DOB, OITS, etc.)	

Description of Requested Changes:	
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Reason/Justification for Change:	
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Portal will accommodate fields for OGS Receipt and Review Here
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<p><i>*Change requests for Executive Agency Authorized Users are approved by the MSP and submission of the change form does not guarantee proposed changes will be accepted. Change requests for Non-Executive Agency Authorized Users are filed with the MSP, but subject to the approval of the Non-Executive Agency Authorized User.</i></p>

HBITS Form 7: **Contractor Issue Form**

Contractor Name:	
Contractor Contact Phone #:	
Contractor Contact E-mail:	
Authorized User Name:	
Specific Staff Name(s):	
Task Order #:	
Issue Report Date to OGS:	
Description of Issue:	
Have you tried to directly resolve this issue with the Authorized User??	
When did this occur?	
2ND Instance?	
3rd Instance?	
Was the Authorized User responsive to attempts to resolve issue?	
Did the Authorized User provide all workplace rules to the Consultants?	
If Yes, on what date?	
What was the first responsive corrective action?	
What was the suspected cause?	
What steps should be considered to correct this issue and/or avoid a duplicative problem in the future?	
*Note to Contractors: A completed Form 7 is required for the HBITS Group and OGS to address any Contractor/Authorized User related issues.	

HBITS Form 9: **Contractor Performance Evaluation Process**

Part I of the Annual Evaluation will be the responsibility of the MSP in OGS. Most data will be derived from MSP data collection and Contractor submissions. Part II of the Annual Evaluation will be derived from Executive and Non-Executive Agency Task Order Satisfaction Forms (Form 4). The source of the data to be collected is noted after each scoring factors in the parentheses below.

Part I:

I. Contractor Responsiveness (18 points):

Any statement answered with a "YES" receives 9 points. Any statement answered with a "NO" receives a score of zero points.

1. Contractor provided potential Candidates to at least 60% of the postings (bid submissions/postings). (MSP)
2. Contractor provided potential Candidates to 75% or more of HBITS postings (bid submissions/postings) (MSP)

II. Compliance Review (21 points):

Any statement answered with "YES" receives 3 points. Any statement answered with "NO" receives a score of 0 points. For questions 4 and 6, a Contractor with no engagements or payments within the eleven months preceding the annual review process should respond "not applicable" and the point value will not negatively affect your final calculation.

1. Contractor maintains adequate insurance for the proposed job. (MSP)
2. Contractor paid the Administrative Fee in the time and manner as dictated in the Section 6.2.4 of the Contract or timely filed the notice that no administrative fee is due. (MSP)
3. Contractor has submitted monthly M/WBE compliance report to the MSP in accordance with Section 6.2.7 and Appendix C of the Contract. (MSP)
4. Contractor has submitted its monthly reports to the MSP, with active engagement information. (MSP)
5. Contractor has submitted required Form B, as stated in section 5.16 on a timely basis (annually May). (Form #7)
6. Contractor paid sub-contractors/Consultants for previous task orders on time (no later than 15 days after payment from OGS). (MSP staff will call Consultants and/or sub-contractors throughout 12 month period to verify payment dates).
7. Contractor has recertified its standard vendor responsibility questionnaire in accordance with Section 5.12. Based on a review of this questionnaire and independently acquired information, Contractor is a responsible vendor. The review will include verifying that Contractor is registered and is authorized to conduct business in NYS, and that current liens and court cases, etc. are in the questionnaire (if applicable). (Check vendor registration, Attorney General, Vendor Registration Database, Vendor Review, etc.)

III. M/WBE Participation Goals (3 points):

Any statement answered with "YES" receives 3 points. Any statement answered with "NO" receives a score of 0 points. Contractors with no engagements within the eleven months preceding the annual review process should respond "not applicable" and the point value will not negatively affect your final calculation.

1. Contractor has engaged in good faith efforts to meet the MBE participation goal of 11% and WBE goal of 9%. (MSP and review by OGS M/WBE office)

IV. General Quality (18 points):

Any statement answered with "YES" receives a score of 0 points. Any statement answered with "NO" receives a score of 6 points.

1. Contractor received three or more vendor issue form(s) in the past 12 months. (Database)
2. Contractor received one vendor issue form in the past 12 months. (Database)
3. Contractor has received a satisfaction survey(s) for less than 70 points in the past 12 months. (Database)

V. Administrative: (9 points)

Any statement answered "YES" is a deduction of 3 points. Any statement answered with a "NO" receives a score of 3 points. A Contractor that did not have to submit invoices will receive the applicable points awarded.

1. Contractor submitted monthly reports to the MSP past the required fifteen days from the last day on the month. (MSP).
2. Contractor's invoices were submitted to OGS later past the required fifteen days from the last day of the month of completed work. (MSP)
3. Contractor's invoices were inaccurate on two or more occasions based on a comparison of the submitted invoices with the monthly report published by the database. (MSP)

VI. Payment of Consultant Hourly Wage Rate: (6 points)

Any statement answered with "YES" receives a score of 0 points. Any statement answered with "NO" receives a score of 3 points.

1. In the past 12 months, Contractor was found in one instance to have not paid a Consultant the Hourly Wage Rate within the Slight Deviation. (Database)
2. In the past 12 months, Contractor was found in two or more instances to have not paid its Consultants the Hourly Wage Rate within the Slight Deviation. (Database)

Contractor Performance Evaluation

Part II - Authorized User Evaluation

The database will record the score from all the HBITS Task Order Satisfaction Forms (Form 4) submitted on a Contractor and add it to the Total Annual Evaluation scoring matrix.

Part II: (25 points maximum)

Authorized User Satisfaction:

The average score of the HBITS Task Order Satisfaction Forms completed for each Contractor, will be used in the calculation of the remaining 25 points; e.g., average score of 100 points of satisfaction form = 25 points.

Part I Score (max. 75 points): _____

Part II Score (max. 25 points): _____

TOTAL SCORE: _____