

PROCUREMENT INSTRUCTIONS

A. Authorized User Responsibilities:

1. It is the responsibility of each Authorized User to evaluate the Contract offerings and determine which Subscription Service(s) and Launch Package(s) complies with the Authorized User's statutory and regulatory requirements prior to acquisition. This includes, but is not limited to, the following:
 - a. Security;
 - b. Accessibility; and
 - c. Data protection and privacy laws.

Contractor shall provide available information to the Authorized User in order to facilitate such determination.

2. Subscription Service(s). It is recommended that Authorized User in order to identify the appropriate Subscription Service(s) plan provide a detailed description of the Authorized User's current and anticipated Subscription Service(s) needs, and request Contractor to identify which Subscription Service(s) plan, or combination thereof, best meets the Authorized User's needs.
3. Launch Packages. It is recommended that Authorized User obtain the following information from Contractor when inquiring about offerings under the Contract and include the following information, as applicable, in the Purchase Order:
 - a. In order to identify the appropriate Launch Package provide a detailed description of the Authorized User's current and anticipated needs for Subscription Service(s), including, but not limited to, whether the Authorized User intends to include pages other than the Homepage in the launch of the OpenData Portal Plan.
 - b. The number of professional service hours associated with each element of a Launch Package and the number of professional service hours remaining for implementation/operation of the Launch Package for the Authorized User, including, but not limited to, the following:
 1. Kickoff Call;
 2. Weekly Meetings;

3. Training; and
 4. if Contractor staff will be on-site, and, if so, an estimate of any travel expenses.
- c. The number of individuals and titles, as set forth in Part 1, Plan Limits, of Appendix D, Plan Limits and Service Level Agreements, that will be performing any professional services for each element of the Launch Package, including, but not limited to, the following as applicable:
1. Kickoff Call and Weekly Meetings
 2. Training
 3. Standing up any pages beyond the Homepage
 4. if Contractor staff will be on-site, and, if so, an estimate of any travel expenses.
 5. Itemized cost for exceeding any element in a Launch Package, and the cost for any associated professional services, number of people and titles, associated with the element.
 6. Request an identification of the named support resources that will comprise the Dedicated Support Team in the OpenData Launch Package Ultimate Plan.
 7. Launch Package offerings are limited to the Homepage. Any services and/or deliverables required beyond the Homepage may be subject to additional fees and needs to be defined in the scope of work.
4. An Authorized User is required to obtain all necessary approvals prior to making any purchase under the Contract.
 5. Upon Authorized User acceptance of Products and/or Services itemized on the purchase order, Contractor(s) will invoice Authorized User for any portion of products and services accepted, and accordingly, Authorized User will arrange for payment. Contractor shall provide itemized invoicing for all products and Services.

Note: Contractor must disclose any forms, or other order information, that Contractor will attach to orders or require completion of when Authorized User makes a purchase. Documents which contain additional terms and conditions must receive written, pre-approval by OGS for use under the Contract. Additional terms and conditions that were not pre-approved in writing by OGS are void. Additional terms and conditions which conflict with the Contract shall be removed at the discretion of the State.

6. An Authorized User will issue a Purchase Order(s) directly to the Contractor specifying and shipping/delivery requirements and referencing statements of work (as applicable) for services.

B. Contractor Responsibilities:

Provide a written quote based on the Authorized User's statement of need for Subscription Service(s) and Launch Package(s) that includes, but is not limited to, the following:

1. A total for all non-recurring and recurring charges.
2. All information requested by an Authorized User in Paragraph A of this Section shall be separately itemized for each Subscription Service and Launch Package requested by the Authorized User

PLAN TO PROCURE (PTP)

All New York State agencies must notify the Office of Information Technology Service f/k/a Office for Technology (CIO/OFT) of any purchases of technology that meet the stated thresholds and technology-related materials, services or otherwise, as stated in Technology Policy NYS-P08-001: <http://www.cio.ny.gov/policy/NYS-P08-001.pdf>, as may be amended.