**Agency Information and Instruction Sheet for**

**Information Technology Vendor Managed Services**

(as of 12/7/17)

1. **CONTRACTOR INFORMATION:**

Covendis has weekly online training that anyone can sign into. Contact them directly for access and schedule.

**COVENDIS**

Melanie Paolucci

melanie.paolucci@covendis.com

Director of Programs and Operations

303-241-9616

1. **OVERVIEW**:

Covendis offers a web based system to request, review, and approve IT contingent workers needed by State agencies. Each agency will have a customized site set up based on individual agency signatory and approval needs. Users can request, track, verify time, and review invoicing via the system. The contract offers other services such as consolidated billing if the agency wishes.

This contract provides Information Technology positions only, and may not be used for non-IT, medical, temporary, architectural/engineering services. IT position titles under this contract are not limited to those listed. New, IT related titles may be added with appropriately discounted rate ranges. New titles must be approved by the contractor and DAS.

The contractor will request contractual background checks as well as agency specified, verify I-9 status (Employment Eligibility Verification), get consultant sign off on our state’s technology policies. The “Interview Sheet” has been revised, but is not mandatory for either DAS or BEST. The agency should determine if this form needs to be completed and submitted with the CORE-10. Copies of licenses and/or passports or other identifying information should not be included with your CORE-10s.

VMS fees are fixed, and are NOT included in the hourly rates. These fees must be listed as a separate line item VMS fees are based on a tiered cumulative spend. The tiered cumulative spend will be based on monthly sales reports to NASPO. The current VMS fee will be posted to the State Contracting Portal Contract 14PSX0338 information.

Hourly rates are tied to market data and may change quarterly if requested with appropriate market data by the contractor and approved by DAS.

The contract also offers bill consolidation, online time approval, reporting capabilities.

All requests for consultants that fall within the top third of the rate range will require a business justification for CIO review and approval. Covendis has programmed the State’s account to flag these ranges when reviewing consultant resumes. Review of the justification of the higher rate by the CIO shall be via email from the IT Manager.

No final offer to the consultant can be made prior to approval and issuance of Purchase Order.

1. **TO SET UP YOUR AGENCY ACCOUNT:**

Go to: <https://fs27.formsite.com/covendiscustomercare/form22/form_login.html>

*NOTE: for all users/approvers named, a phone number and email will be needed to complete the set up.*

**A**. Determine who will be the agency contact for IT VMS. That person will set up the initial agency default preferences not already determined at the statewide level, provide user name and contact information, provide Business Office name and contact for ordering and invoicing purposes, and ongoing user maintenance for the agency.

**B**. There are four roles listed in the New Agency Information form. Buyer Administrator is reserved as this gives view and edit access to *all* requests and proposals in the system (all agencies).

A phone number and email will be needed for all users/approvers named to complete the set up. Additional names may be added by agency at any time.

Buyer Administrator – reserved

Engagement Manager – enter and access agency requests for view and/or edit

Finance Manager – authorizes payments; A/P contact information will be needed

Time Bill Approver – verifies time in system

**C**. Approval workflow at two levels: (thresholds may be used as routing factors)

**Requisition** – Approvals needed prior to the SOW posting by Covendis to supplier network (internal approval levels, etc)

**Proposal** - Approvals needed prior to contingent worker starting work (non-disclosures, background checks, etc.)

**D**. Upload any necessary agency document templates (an SOW is required for all requests) to the system for users.

**E**. Choose between Group Time and Materials (hourly) or Project/Milestone (fixed price), or leave blank if this will be determined at time of request.

**F**. Background checks other than those specified in the State contract are listed in a checkoff section. Check off any additional checks to be applied to all agency requests, or leave blank for this to be determined at time of request.

Each user should receive an email from Covendis. If you do not receive an email, call them directly at the above contact information.

Subject: Welcome to the Services eProcurement Application

*Welcome to the Services eProcurement Application. You have been registered by Connecticut Department of Administrative Services.*

*You have been assigned the following login information.*

*Login ID: #####*

*Temporary Password: #####*

*For security reasons, please change your temporary password when you first log on.*

*To log on, please follow these easy steps:*

1. *Login at* [*~~http://connecticut.covendis.com~~*](http://connecticut.covendis.com)

Use <https://secure.covendis.com/cov/covendis.htm>

 *2. Enter your Login ID in the LOGIN box*

 *3. Enter your temporary password in the PASSWORD box*

*On the following page:*

 *1. Enter your temporary Password in the OLD PASSWORD box*

 *2. Change your password in the NEW PASSWORD box*

 *3. Enter your password again to confirm*

1. **SELECTION PROCESS STEPS**
2. When requesting IT contingent worker(s), Client Agencies shall provide Contractors with a written Statement of Work (SOW) that sets forth the deliverables, the desired outcome and the timeframe by which the IT contingent worker(s) shall complete SOW requirements. The Services eProcurement Application provides a standard SOW template.
3. Upon request from the Client Agency, the Contractor shall provide resumes from qualified IT contingent worker(s) (via the Services eProcurement Application).
4. Client Agency shall review the provided resumes, schedule interviews and conduct interviews on the basis of the resumes, with primary emphasis on selecting a qualified IT contingent worker(s) at the lowest rate.
5. Client Agency makes determination of qualified IT contingent worker(s) with lowest rate via the Services eProcurement Application. At this time, the agency may also request from the Contractor Employment Eligibility Verification.
6. Client Agency submits CORE-10 for IT services with SOW, Covendis proposal, and any pertinent information attached. Statutorily, all IT procurements require CIO or designee approval.
7. Purchase Order is issued upon approval of CORE-10 for IT services. No services can begin prior to PO being issued.
8. An SOW shall only be effective if attached to a properly issued purchase order.
9. The SOW may be revised only in a written document issued by the Client Agency and approved by CIO via CORE-10 process. There shall be no changes to the scope of the SOW.
10. **CONTRACTOR’S ONLINE *SERVICES EPROCUREMENT APPLICATION***

Here you will request the services, attach the Statement of Work and receive resumes, schedule interviews, and recommend IT contingent workers based on the process outlined in 3. (*DAS will continue to work with Covendis to customize this account.)*

The Services eProcurement Application also allows for review of time, time approval, as well as billing and invoice review.

Upon Agency set up, Covendis will provide a customized quick reference guide and a Buyer Guide for the agency once Covendis maps your agency processes.

*Services eProcurement Application* Features:

 Quick Reference Guide For Setting-Up Interviews

Application Dashboard (see screen shots) – follows the life cycle of the request:

* Folders: Active; Inactive; Add; Manager – folders can be by project, unit, funding, etc. – set up by agency as needed
* Requisitions: Requisitions; Templates *(this is where you will go first to begin a request for a consultant and to upload the SOW)*
* Proposals *(here is where your response to your request and interview set up information will appear)*
* Contracts (current commitments via approved purchase order)
* Bills
* Invoices
* Users
* Reports
* Action Item list on right
1. **Financial Considerations**
2. The Client Agency shall allow billing for one-quarter hour increments.
3. The Contractor shall require the IT contingent worker(s) to work the hours and schedule approved by the Client Agency. All of the time worked will be subject to verification by the Client Agency. The Contractor shall keep true and accurate records of the time worked.
4. Unless otherwise previously approved in writing by the Client Agency, the Contractor shall be responsible for the costs and expenses of the IT contingent worker(s) attending or otherwise participating in training events.
5. The Contractor shall be solely responsible for all costs and expenses associated with the transportation of Contractor’s personnel and their possessions.
6. The Contractor shall not bill for travel time for travel from the IT contingent worker(s) place of residence and Client Agency’s location.
7. The Contractor shall not be paid any out-of-pocket expenses incurred for travel to the Client Agency’s location. Contractor shall be entitled to reimbursement of travel expenses incurred only if the expenses were authorized beforehand, in writing, by the Client Agency. Payments may not exceed the State’s most current State managerial expense rate.

g. The Contractor and IT contingent worker(s) shall not attend training courses at the expense of the Client Agency, unless such courses are in the best interests of the Purchasing Entity and training is included within the approved SOW. Credit for all or a portion of training may be collected by the Client Agency if the IT contingent worker(s) leaves or is assigned elsewhere within six months of the training date. Credit must be pro-rated based on post-training time in Position Title.

h. There shall be no upward reclassification of an IT contingent worker(s) during the term of the SOW into a higher experience category for pay purposes. Revisions to the SOW regarding Position Title, level of experience, or responsibilities of the IT contingent worker(s) must be within the scope of the initial SOW and must be made in writing by the Client Agency to the Contractor.

i. Payment will be made for actual hours worked. The Contractor shall require the IT contingent worker(s) to work the hours and schedule as mutually agreed upon in the SOW. Client Agency and Contractor shall make reasonable efforts to accommodate schedule changes with sufficient prior notice, two (2) weeks whenever possible. Revisions made in any SOW must be made in writing in accordance with Section 5 of the Contract. All hours worked will be subject to verification by the Client Agency.

j. Overtime, any time worked over forty (40) hours in one work week, requires prior Client Agency approval. If overtime is authorized by the Client Agency, overtime will be paid as mutually agreed upon but must not exceed 1-1/2 times the appropriate hourly rate.

1. **Replacement Of IT Contingent Worker(S)**

a. If an IT contingent worker(s) currently Performing work for a Purchasing Entity separates from the Contractor’s employment, the Contractor shall notify the Purchasing Entity as soon as it becomes aware of said IT contingent worker(s) departure or ten (10) business days' advance notice, whichever is longer. The Contractor shall notify the Purchasing Entity in writing within twenty-four (24) hours in the event of an unanticipated departure of an IT contingent worker(s).

b. At the discretion of the Purchasing Entity, the Contractor will replace any IT contingent worker(s), either pursuant to this section or Section 28 of the Contract, with an equally or more experienced IT contingent worker(s) at no additional cost. The Contractor shall submit to the Purchasing Entity, no later than 2 business days after the removal of an IT contingent worker(s), the cost value of the proposed replacement IT contingent worker(s) and such other information as the Purchasing Entity may request for review prior to having the IT contingent worker(s) begin to Perform. The Contractor shall also arrange for orderly and timely transfer of knowledge related to the IT contingent worker(s) assignment(s).

c. Upon receipt of written notice of replacement or removal of the IT contingent worker(s), the Contractor shall immediately re-direct the IT contingent worker(s) duties relative to the Purchasing Entity in accordance with the requirements of the notice and, if requested, deliver to the Purchasing Entity all Records as may have been accumulated by the IT contingent worker(s) in Performing under this Contract, whether completed or in progress.

d. If Contractor’s provided IT contingent worker(s) fails to Perform or is found to lack the basic skills for which she/he was selected, or the Contractor dismisses any IT contingent worker(s) prior to the end date specified in the Purchase Order, the Purchasing Entity shall receive a credit based upon the following table:

Number of Work Days Worked by the IT

Contingent Worker(S) Calculation of Customer Credits

1 thru 20 days Credit for total charges of actual days

worked or ten (10) days, whichever is less

All Contract documents are located on the State Contracting Portal at <http://www.biznet.ct.gov/SCP_Search/ContractDetail.aspx?ID=18760>.

The Participating Addendum, specific to the State of Connecticut, can be found at <http://www.biznet.ct.gov/SCP_Documents/Results/18760/S.O.C.%20Participating%20Addendum.pdf>.

If you have any questions on the contract, please email me at elizabeth.basso@ct.gov.