

# **Commonwealth of Virginia ITCL Contract**

## **Staff Augmentation (SA) Process**

**Prepared by CAI and Virginia Information Technologies Agency,  
Supply Chain Management**



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## **PURPOSE**

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The purpose of this document is to provide a general overview of the Commonwealth of Virginia Information Technology (IT) Contingent Labor contract (Contract Number VA-130620-CAI) and to guide you through the process for procuring staff augmentation resources through this contract.

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# CONTRACT OVERVIEW

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CAI is the managed service provider (MSP) responsible for managing IT staff augmentation services. They are responsible for vendor response management, candidate evaluation and validation, interview facilitation, general project management, invoice processing, and vendor performance oversight.

## Highlights

Key provisions of the IT Contingent Labor Contract include:

- Job titles encompassing a wide array of IT staff augmentation positions and experience levels.
- Not-to-exceed staff augmentation rates covering the state of Virginia with separate rates for Northern Virginia.
- A diverse, open CAI Subcontractor network providing the right resources and the best solutions.
- A web-based vendor management system (VMS) known as VectorVMS in which Authorized User personnel submit their requirement, CAI Subcontractors submit their candidates, and CAI manages the entire process.
- Access to a web-based reporting system that provides visibility into Authorized User and CAI Subcontractor performance.
- Performance-based SLAs to ensure that the Commonwealth is receiving quality candidates in an expedient fashion.

For VITA IT Contingent Labor program information, see the VITA website at: <https://www.vita.virginia.gov/supply-chain/it-contingent-labor/>

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## **USER ROLES – STAFF AUGMENTATION**

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This section identifies the key personnel using the Staff Augmentation portion of the IT Contingent Labor Contract, and highlights their roles in the engagement process.

### **Authorized User**

The following Commonwealth personnel are involved in the engagement process:

#### **Authorized User/Hiring Manager**

##### **APPROVAL PHASE**

- Works with CAI Account Manager to build the job requirements and properly classify the position into one of the contract's pre-defined job titles.
- May enter the requirements in VectorVMS.
  - Other Authorized User personnel may enter requirements on his or her behalf.
- Enter the requirements in the eVA system or their own purchasing system to obtain PO approval.
  - Other Authorized User personnel may enter requirements on his or her behalf.

If requesting a named resource, or a named CAI subcontractor, the executive branch agency must obtain the approval of their CIO or AITR. Other public bodies must obtain approval of the executive who can commit funds for the public body.

##### **RESOURCE ENGAGEMENT PHASE**

- Provides CAI Account Manager with PO.
- Works with CAI Account Manager if clarification is needed.
- Reviews the resumes of candidates submitted to fill the position and determines if interviews are necessary.
- Notifies the CAI Account Manager if personal interviews are desired.
- May conduct phone or personal interviews of candidates.
- Makes selection of best candidate to fill the position and informs CAI Account Manager.

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## **Authorized User Chief Information Officer (CIO)**

### **APPROVAL PHASE**

- Works with Authorized User/Hiring Manager, as necessary, on approval of position and funding.
- Authorizes use of Named Resources.
- Ensures compliance with all IT Investment Management, IT Security, IT strategic plan and other policies as applicable.

### **VITA**

- Escalation point for contractual issues.
- Develops and maintains policies and guidelines for contract, and contract use by Authorized User's personnel.

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## CAI Account Manager

The CAI Account Manager is responsible for the following tasks:

### APPROVAL PHASE

- Assists Authorized User/Hiring Manager(s) with classifying staff augmentation needs.
- Assists Authorized User/Hiring Manager(s) with writing consistent and concise requirements for potential staff augmentation positions.

### RESOURCE ENGAGEMENT PHASE

- Reviews requirements and works with Authorized User/Hiring Manager(s) if clarification is necessary.
- Releases requirements to vendor network via VectorVMS.
- Reviews and screens resumes of candidates submitted by vendors.
- Works with vendors to obtain additional information as needed.
- Phone screens candidates to verify required skills and experience.
- Submits resumes of three to five best-qualified candidates to Authorized User/Hiring Manager for selection, within the time limits of the Service Level Agreements.
- Manages arrangements for personal interviews, if requested.
- After selection of candidate, notifies vendor and offers engagement to candidate.
- Coordinates on-boarding process.
  - Ensures that candidate reports for assignment.
  - Ensures that candidate completes any onboarding requirement.
  - Ensures that candidate gets necessary background checks, e-Verify clearance and security badges.

## CAI Subcontractor Network

CAI's Subcontractor network does the following:

- Reviews requirements for temporary IT personnel.
- Submits resumes of qualified and available candidates through VectorVMS.
- Works with CAI Account Manager if additional information is needed.
- Completes onboarding requirements for selected candidates including: background checks, e-Verify clearance, etc.
- Works with CAI to arrange candidate interviews and assignment start dates.

# STAFF AUG REQUIREMENT FULFILLMENT WORKFLOWS

There are three main types of requirements under the IT Contingent Labor contract:

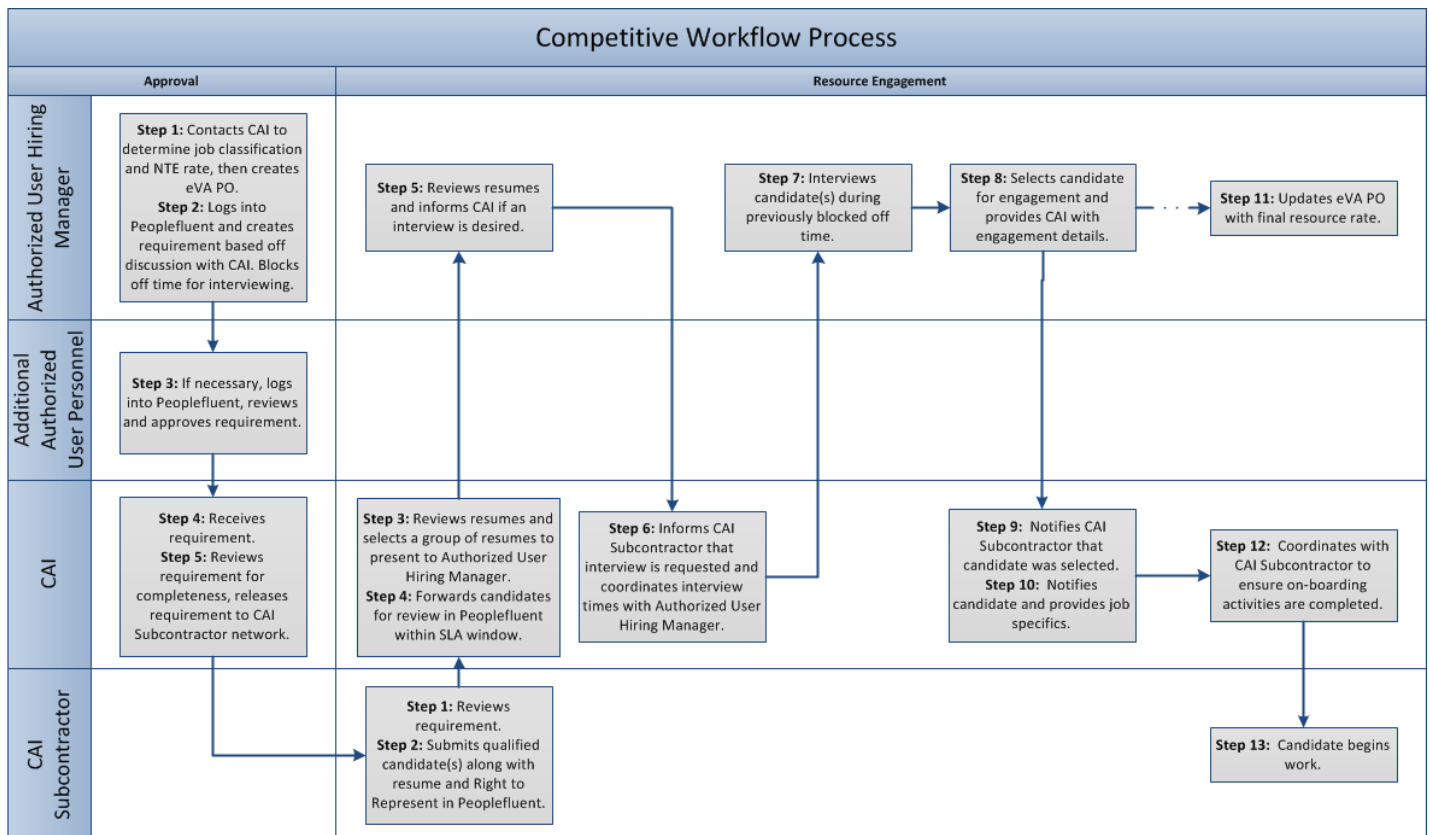
- Competitive – This selection is required to ensure that the best resources are provided at reasonable market rates.
- Named Resource – In rare instances, Named Resources are permitted if one of the following conditions is met:
  - An emergency Situation
  - A resource is a subject matter expert that has worked on the system or project within the last two years and is the only resource practicable to perform the work.
- Extension of an Existing Resource

The following pages detail the process for each one of these requirement.

**Please note:** Depending on the processes of each Authorized User this process may vary. Please be sure to follow specific Authorized User procurement guidelines.

## Competitive

The following diagram illustrates the standard workflow process for the Virginia IT Contingent Labor Contract. Detailed narrative begins on the next page.





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## **Approval**

**Step 1:** Authorized User/Hiring Manager contacts CAI to determine Job Classification and not to exceed (NTE) rate, then creates Purchase Order based on NTE rate and estimated hours within eVA or other PO process.

**Step 2:** Authorized User/Hiring Manager logs into VectorVMS and creates requirements based on discussion with CAI, filling in job details, skill requirements and other information. If manager needs a VectorVMS login issued, CAI Account Manager will assist. Then the PO number is put into VectorVMS requirements and Authorized User/Hiring Manager blocks off calendar time to accommodate interviewing candidates forwarded by CAI.

**Step 3:** If necessary, the requirements are reviewed and approved by additional Authorized User personnel via VectorVMS.

**Please note:** If you are designated as a VectorVMS approver, you will receive an automatic email notification from the system requesting that you view and approve the requirements.

**Step 4:** Once the VectorVMS requirements have received the necessary approvals, the requirements are sent to the CAI Account Manager for final approval.

**Step 5:** The CAI Account Manager reviews the requirements for completeness, and releases the requirements to the CAI Subcontractor network.

## **Resource Engagement**

**Step 1:** The CAI Subcontractor reviews the requirements.

**Step 2:** The CAI Subcontractor submits qualified candidate along with resume and Right to Represent form into VectorVMS.

**Step 3:** The CAI Account Manager reviews the resumes and selects a group of resumes to present to the Authorized User/Hiring Manager, based on skill and experience match and availability.

**Step 4:** The CAI Account Manager forwards the qualified candidates to the Authorized User/Hiring Manager for review via VectorVMS.

**Please note:** This must happen within the required time frame identified in the contract's service level agreements.

**Step 5:** The Authorized User/Hiring Manager reviews the forwarded resumes and notifies the CAI Account Manager if he or she would like to interview any of the candidates.

**Step 6:** The CAI Account Manager notifies the CAI Subcontractor and coordinates interviews with the Authorized User/Hiring Manager.

**Step 7:** The Authorized User/Hiring Manager interviews the candidate during previously blocked-off time, either by phone or in-person.

**Step 8:** The Authorized User/Hiring Manager selects a candidate and provides the CAI Account Manager with complete engagement details, including start date, work address, parking details, person to whom he or she should report, etc.

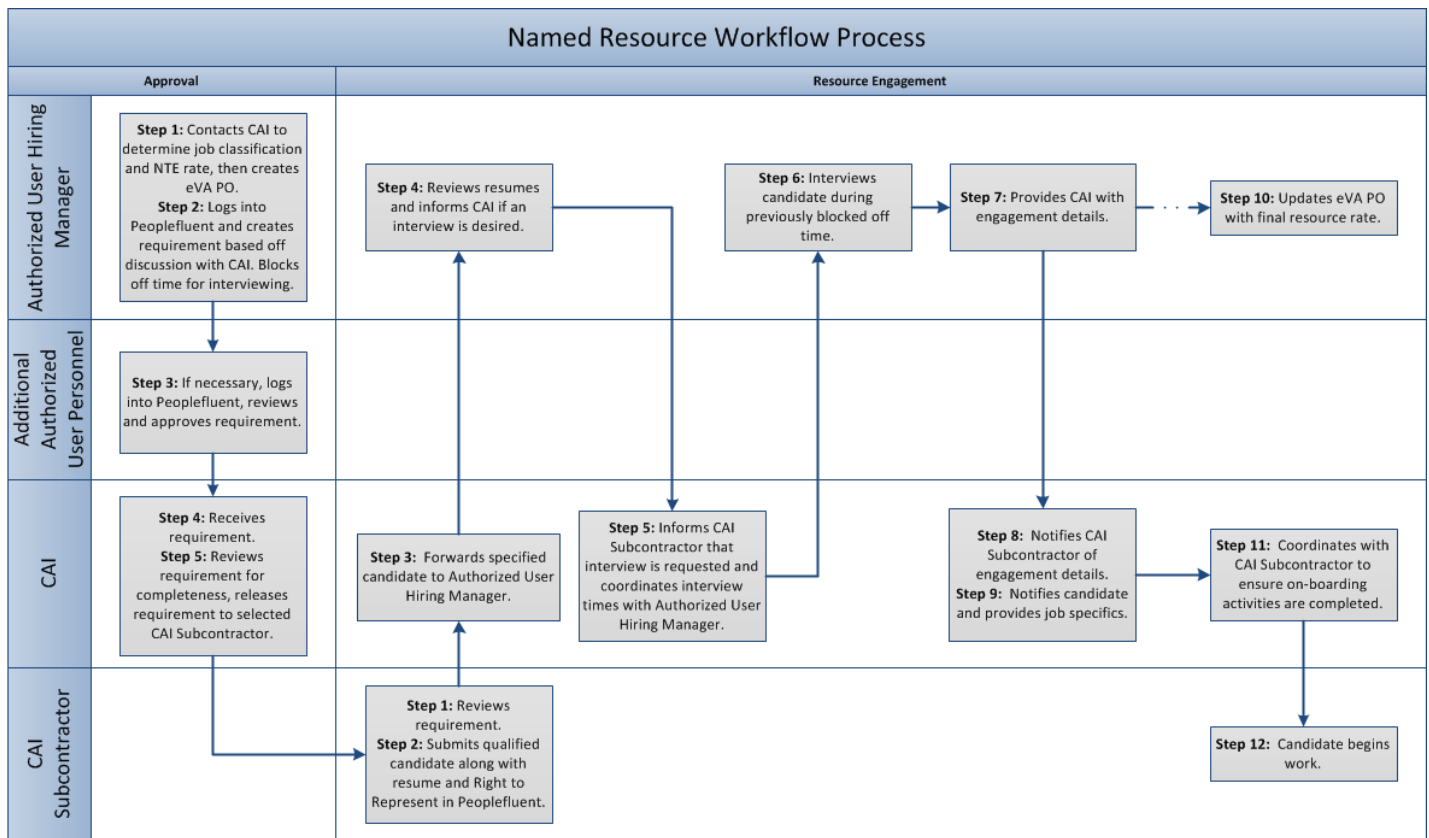
**Step 9:** The CAI Account Manager notifies the CAI Subcontractor that their individual candidate was selected.

**Please note:** When the selected candidate is engaged in VectorVMS, the system automatically notifies CAI Subcontractors if their candidates were not selected.

- Step 10:** The CAI Subcontractor notifies the selected candidate and provides job specifics.
- Step 11:** Authorized User/Hiring Manager updates the PO with final resource rate.
- Step 12:** The CAI Account Manager works with the CAI Subcontractor to make sure that all on-boarding activities are complete (i.e. background check).
- Step 13:** The candidate begins work.

## Named Resource

The following diagram illustrates the workflow process for requirements in which a specific candidate has been chosen. Detailed narrative begins below.



**Please note:** Authorized User personnel may request a specific resource only if at least one of the following conditions is met:

- The resource served as a subject matter expert on a custom application or within a similar business environment within the last two years
- An emergency situation

## Approval

**Step 1:** Authorized User/Hiring Manager contacts CAI to determine Job Classification and not to exceed (NTE) rate, then creates Purchase Order based on NTE rate and estimated hours within eVA or other PO process.

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**Step 2:** Authorized User/Hiring Manager logs into VectorVMS and creates requirements based on discussion with CAI, filling in specific resource/CAI Subcontractor name, job details, skill requirements and other information, including the PO number.

**Step 3:** As necessary, the requirements is reviewed and approved by additional Authorized User personnel via VectorVMS.

**Please note:** If you are designated as a VectorVMS approver, you will receive an automatic email notification from the system, requesting that you view and approve the requirements.

**Step 4:** Once the VectorVMS requirements has received the necessary approvals, the requirements is sent to the CAI Account Manager for final approval.

**Step 5:** The CAI Account Manager reviews the requirements for completeness, and releases the requirements to the specific CAI Subcontractor or the CAI Subcontractor employing the specified candidate.

## **Resource Engagement**

**Step 1:** The CAI Subcontractor reviews the requirements.

**Step 2:** The CAI Subcontractor submits the qualified candidate along with resume and Right to Represent form into VectorVMS.

**Step 3:** The CAI Account Manager forwards the specified candidate information to the Authorized User/Hiring Manager for review via VectorVMS.

**Step 4:** The Authorized User/Hiring Manager reviews the forwarded candidate and notifies the CAI Account Manager if he or she would like to interview the candidate.

**Step 5:** The CAI Account Manager notifies the CAI Subcontractor and coordinates interview with the Authorized User/Hiring Manager.

**Step 6:** The Authorized User/Hiring Manager interviews the candidate either by phone or in-person.

**Step 7:** The Authorized User/Hiring Manager provides the CAI Account Manager with complete engagement details, including start date, work address, parking details, person to whom he or she should report, etc.

**Step 8:** The CAI Account Manager notifies the CAI Subcontractor of the engagement details.

**Step 9:** The CAI Subcontractor notifies the selected candidate and provides job specifics.

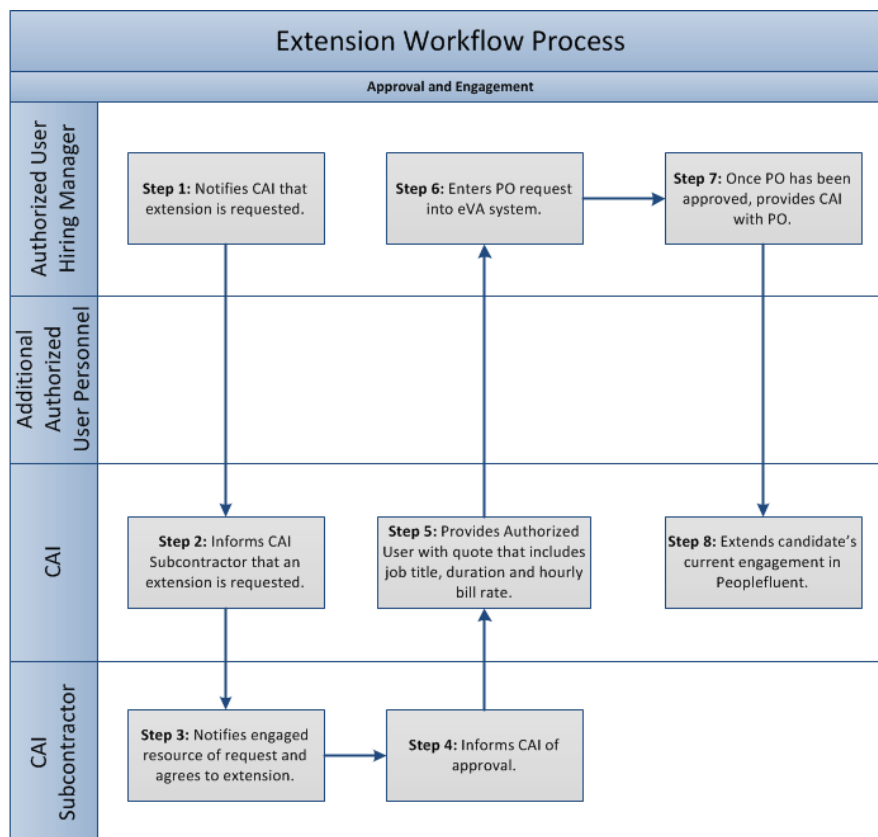
**Step 10:** The authorized User/Hiring Manager updates the PO with final resource rate.

**Step 11:** The CAI Account Manager works with the CAI Subcontractor to make sure that all on-boarding activities are complete (i.e. background check).

**Step 12:** The candidate begins work.

## Extension of an Existing Resource

The following diagram illustrates the workflow process for requirements in which a candidate's assignment is being extended. Detailed narrative begins below.



**Please note:** This process only applies if the job title and rate remain the same. If the job title and/or rate are changing, follow the **Specific Resource** process above.

### Approval and Engagement

**Step 1:** Authorized User personnel notify CAI that it would like to extend the resource.

**Step 2:** CAI informs the CAI Subcontractor that the Authorized User wishes to extend the resource's engagement.

**Step 3:** CAI Subcontractor communicates the request to the resource and agrees to the extension.

**Please note:** In the rare instance that the CAI Subcontractor and/or resource don't agree to the extension, please follow the aforementioned **Competitive** process.

**Step 4:** CAI Subcontractor notifies CAI of its approval.

**Step 5:** The CAI Account Manager provides the Authorized User with a quote that includes job title, duration, and hourly bill rate.

**Step 6:** The Authorized User personnel enter a PO request into the PO system.

**Please note:** No PO for a resource can be extended for more than **six (6) months**.

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**Step 7:** Once the PO has received the necessary approvals, The authorized User provides the CAI Account Manager with the Purchase Order.

**Step 8:** CAI extends the candidate's current engagement in VectorVMS and informs the CAI Subcontractor of the Authorized User.

**Please note:** An extension request, at the same job title and rate, **doesn't** require the creation of a new engagement, eliminating the need for:

- Authorized Users having to create/approve a new VectorVMS engagement.
- CAI Subcontractors having to submit the candidate a second time.
- CAI having to engage the candidate again.

## Usage of the Exception Job Classification

An Exception job category can be requested and used when a resource that does not fall into one of the existing job titles is needed.

When such a need arises, the authorized User should contact CAI. CAI will review the contract metrics to determine if a similar resource has been placed under one of the existing titles and provide these results to the Authorized User.

If no historical contract data is available, CAI will conduct an analysis of labor rates for similar work and recommend a customized bill rate.

Exceptions will be routinely reported as part of program oversight, reporting of user demographics, and executive reporting provided to VITA. CAI will also track and report on the usage of the exception process quarterly, such as Authorized User usage and spend tracking. This data can be used to determine if another title needs to be added to the contractor or if existing titles/rates need to be adjusted in any way.

## Approval and Engagement

Exception category usage can be competitively filled by the CAI Subcontractor network or approved for a specific resource or firm. Therefore, the approval and procurement processes are the same as the aforementioned **Competitive** and **Specific Resource** sections.

**Please note:** Exception job title usage may require additional approvals from Authorized User personnel and AITR before going to the CAI Account Management team.

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## STAFF AUG MANAGEMENT ACTIVITIES

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The Management Phase begins when the candidate begins his or her assignment under the IT Contingent Labor Contract and is engaged in the VectorVMS system. Once a candidate is engaged, he or she must submit timesheets and/or expenses on a weekly basis so that payment can be processed by the Commonwealth. The remainder of this section details each step of this phase.

**Step 1:** Candidate submits timesheet/expense details in VectorVMS each week by Monday at noon. If Monday is a holiday, the timesheet/expense details should be submitted by Tuesday at noon.

**Please note:** Expenses should only be submitted if they are within Commonwealth guidelines and they have been pre-approved by the Authorized User via a line item on the PO.

**Step 2:** The Authorized User Time/Expense Approver reviews and approves the timesheet/expense report via VectorVMS each week by Tuesday at noon. If Monday or Tuesday falls on a Holiday, the timesheet approval process will be delayed by one day.

If the timesheet/expense report is incorrect, the Authorized User/Time-Expense Approver can reject it in the VectorVMS system. The candidate will receive a VectorVMS email stating that it has been rejected. The candidate must go back into VectorVMS and resubmit. Once the candidate has done so, the Authorized User/Time-Expense Approver will receive another VectorVMS email. At that point, the Authorized User/Time-Expense Approver can once again approve or reject. This process continues until the timesheet/expense is approved.

If an Authorized User/Time-Expense Approver has approved a timesheet and it needs to be changed, he or she should contact the CAI Help Desk ([vaitcl\\_help@compaid.com](mailto:vaitcl_help@compaid.com) or 800-635-5138). A Help Desk team member will create a timesheet amendment. Once the amendment has been created, the Authorized User/Time-Expense Approver goes into VectorVMS and approves the change.

If an Authorized User/Time-Expense Approver has approved an expense report that needs to be changed, he or she should contact a CAI Account Manager. The CAI Account Manager will work to make sure that it is corrected.

**Please note:** When a candidate submits a timesheet/expense, a VectorVMS-generated email is automatically sent to the Authorized User/Time-Expense Approver letting him or her know that a timesheet has been submitted and is awaiting approval/rejection.

**Step 3:** CAI uses the approved timesheets/expense reports (and amendments) to generate invoices for payment.

**Step 4:** CAI sends invoice to Authorized User.

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# GUIDANCE ON ORDERING IT CONTINGENT LABOR THROUGH eVA

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Executive branch agencies that order through eVA should follow the process outlined below when creating eVA requisitions and purchase orders for IT contingent labor services.

**Step 1:** The Authorized User/Hiring Manager obtains internal approval for acquiring IT contingent labor.

**Please note:** When needed for requests related to projects, the Authorized User/Hiring Manager obtains necessary project and IT strategic plan approvals.

**Step 2:** Contact Computer Aid, Inc. (CAI) for assistance with determining the job classification for the resources needed and/or discuss the Statement of Requirement for a fixed price engagement.

**Step 3:** For Staff Augmentation engagements (hourly based work):

- Include in the eVA requisition the not-to-exceed hourly rate for the job classification and the number of hours needed in the purchase requisition.
- After the purchase requisition is fully approved or in the ordered status in eVA, the Authorized User/Hiring Manager logs into the VectorVMS system and creates a new requirement, entering the PO number and the required and desired skills.

For Statement of Work based engagements:

- Working with Computer Aid's assistance, complete the Statement of Requirements (SOR) and submit to CAI. After the subcontractor is selected, the Authorized User/Hiring Manager creates the purchase requisition and attaches the completed Statement of Work (SOW.)

**Step 4:**

- If the request is less than \$100,000 the request is submitted directly to the supplier by "R" coding the eVA requisition.
- If the request is equal to or greater than \$100,000, the request is submitted for VITA approval by "V" coding the eVA requisition.
- If the request is equal to or greater than \$250,000, the request is submitted for CIO approval by "V" coding the eVA requisition. (Note: If an APR is required for project or CIO approval, the requisition should not be submitted in eVA prior to the APR being approved and the APR number should be included on the eVA requisition.)

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In the eVA requisition:

- **Vendor:** Computer Aid, Inc.
- **Vendor Contact:** Computer Aid, Inc.
- **Commodity Code:** 96269
- **Quantity and Price:** *[in accordance with the IT Contingent Labor contracted rate card and hours; or SOW total price]*
- **Contract Number:** VA-130620-CAI
- **Bill-to Address:** Authorized User, Institution or Locality placing order
- **PO Category: R1** *[for orders less than \$100,000]* ;
- **PO Category: VR1** *[for orders greater than \$100,000]*
- **Description:** <**Sample description for staff augmentation**> IT Services for XXX hours in accordance with the terms and conditions of the above referenced contract: FROM: 01/01/2014 – 06/30/2014; Consultant's Name: *[name]*; Title: *[job title, e.g., Business Analyst]*; Rate of Pay: *[hourly amount]*
- **Description:** <**Sample description for SOW**> IT Services for *[Title of Project]*: accordance with the terms and conditions of the above referenced contract: FROM: 01/01/2014 – 06/30/2014; Subcontractor's Name: *[name]*; SOW Total: *[Total engagement cost]*
- If the requisition is for an SOW, **attach the statement of work.**

Computer Aid, Inc. invoices the public body per the fee and payment schedule in the PO.

For public bodies that do not utilize eVA, the PO is obtained via their procurement process and faxed to CAI.

For VITA IT Contingent Labor program information, see the VITA website at: <https://www.vita.virginia.gov/supply-chain/it-contingent-labor/>



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## **CONTRACT ASSISTANCE**

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This section includes key contact information for the IT Contingent Labor Contract.

### **Dedicated CAI Account Managers**

Please contact CAI's Executive Account Manager, Christy Butcher, either by phone (804-288-4320) or email ([christy.butcher@cai.io](mailto:christy.butcher@cai.io))

- to discuss your Staff Augmentation staffing needs
- to get assistance with a new requirement
- to ask a question about an existing resource
- to discuss Statement of Work needs
- to get information on the Statement of Work process

### **CAI Help Desk Team**

If you need assistance with VectorVMS, please contact CAI's Help Desk.

The team can be reached by phone (800-635-5138) or email ([vaitcl\\_help@compaid.com](mailto:vaitcl_help@compaid.com))

### **eVA System Assistance**

The website for the eVA System is <http://www.eva.virginia.gov/>.

If you need assistance accessing or using the system, please visit the Customer Care website at <http://www.eva.virginia.gov/vendors/pages/customercaresupport.htm>.