

STATE OF NEW YORK

UNIFIED COURT SYSTEM
OFFICE OF COURT ADMINISTRATION
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NYS Unified Court System
Office of Court Administration

OCA/DS-105: Data Services
Key Entry and Verification of Retainer and Closing Statements

The following are questions submitted prior to the pre-bid conference with related answers.

- 1) Is the Vendor required to include in the bid documents an organization chart for the entire company or an organization chart for the data services operation, only?

Please, include an organization chart for both the company and the data entry services unit.

- 2) Specifically, which diplomas is the Vendor required to include with the bid?

Please include, if applicable, related academic diplomas and technical certificates.

- 3) On what schedule will the Vendor be paid? Is the Vendor expected to invoice OCA?

OCA requires a detailed invoice for each upload conducted. Invoice processing and payment, in most cases, take about 2 to 3 weeks.

- 4) Will the Vendor's compensation be adjusted for actual volumes that are greater or less than the estimated volume of 400,000 forms annually; that is, will the Vendor's invoice be based on the number of forms entered, or will the contract be based on a fixed price? How much variability (from 400,000) can the Vendor reasonably expect?

The vendor is paid based on the number of documents processed. Regarding expected annual volume submitted to OCA, there's generally a five percent variable plus or minus.

- 5) Specifically what reports is the Vendor required to provide and with what frequency?

Error Report – per box

Monthly Production Report

- 6) How many conferences or meeting with UCS or other representatives is the Vendor required to attend during the initial contract period and the one year renewals? Where will these conferences or meetings take place?

The vendor is required to attend all meetings. However, past experience dictate most issues and concerns are resolved over the phone.

- 7) Is the Vendor or UCS responsible for bundling together and arranging Retainer and Closing Statements in Statement number order?

Retainer and Closing Statements are arranged in statement number order prior to vendor pick up.

- 8) Is the Vendor or UCS responsible for grouping forms into batches of no more than 200 and sequentially assigning batch number conforming to the prescribed format?

The vendor is responsible for grouping documents into batches of 200 and assigning batch numbers.

- 9) With what frequency is the vendor required to pick up forms at 25 Beaver Street ? Can pick ups be scheduled at the same time as the vendors biweekly deliveries?

Yes, pick ups can be arranged for the same time as the biweekly deliveries.

- 10) Dictionaries define biweekly as (1) happening every other week or (2) happening twice a week (e.i. semiweekly). How often are vendors required to deliver documents to 25 Beaver Street?

The vendor is required to deliver documents every other week.

- 11) Related to Q3 and Q4, how quickly is the Vendor required to turn around documents (i.e. from pick-up to delivery)?

Thirty days.

- 12) Is the Vendor required to create a packing list (i.e. manifest) indicating which documents are in which box? Is the Vendor required to label and barcode the boxes?

All documents picked up must be returned in their original boxes in the following manner:

- **Batched in groups of 200**
- **With Batch Cover Sheet**
- **With an Error Report citing reasons why documents could not be processed (e.g., missing information, unclear data, etc.)**

- 15) **Are all Retainer and Closing Statements printed on one page, or do they vary in length?**

Most documents are printed on one page and vary in length (8 ½ x 11 and 8 ½ x 14)

- 14) **Do the Retainer and Closing Statements always contain only the information shown in the samples and in the same order as in the samples, or does each filer determine what information is entered into the Statements, and in what order information is entered. (For example, is Item No. 12 the same on every form?)**

Yes, Retainer and Closing Statements always contain only the information shown in the samples and, in most cases, in the same order as in the samples.

- 15) **What is the required turnaround time for a batch of documents?**

Thirty days

- 16) **Will OCA notify the Vendor that an FTP transfer was completed? If so, how?**

Yes, a reported is generated reflecting number of documents successfully uploaded.

- 17) **What version of Microsoft Access does OCA use?**

Microsoft Access 2003.

- 18) **Who will own the system/software used in this project, the Vendor or OCA?**

The Vendor

- 19) **Who will have the final say in the design of Data Entry System, the Vendor or DCA?**

Assuming all of the edit controls are in compliance, the vendor will have the final say.

- 20) Will OCA provide the Vendor with OCA's current Access database or is the Vendor required to create a completely new system?

The vendor is required to design a new system.

- 21) What is the cut off date for submitting questions?

The cut off date for submitting questions is May 20, 2005 at 12:00 noon.

- 22) Can we assume all the information on the illustrated Data Entry Panel is required?

Not all the data entry fields shown on the data entry panel require information.

- 23) Are we paid for documents we review but are unable to process due to missing or unclear information?

No. You should not attempt to process documents that are unclear or missing required information.

- 24) Are we required to submit diplomas and certificates for account department personnel and team members?

If applicable, please submit diplomas and related certificates for managers, supervisors and data entry personnel who will be involved in this effort. If not possible, submit resumes reflecting educational background and employment history.

- 25) Who is the current vendor and what was their bid?

The current vendor is Infoserve Technologies, Inc. and they submitted a bid of \$114,072.

- 26) Does the 90 mile radius requirement apply to where the actual data entry work is conducted?

Yes. The actual worksite where the work is performed should be within a 90 mile radius of Manhattan.

- 27) What exactly do you mean by "biweekly" delivery of finished work?

Completed work should be delivered to OCA approximately every two weeks.

- 28) Can pick-ups be scheduled for the same time as deliveries?

Yes.

- 29) After vendor selection, how long do you predict actual start of work?

Considering the process and past experience, the work, most likely, will begin sometime in the fall.

- 30) When does the current contract expire?
The current contract expires August of 2005.**
- 31) Are we required to key verify every field?
Yes.**

5/19/05