



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
Master Agreement

Order Date: 03-15-2024

CORRECT ORDER NUMBER MUST
 APPEAR ON ALL PACKAGES, INVOICES,
 AND SHIPPING PAPERS. QUESTIONS
 CONCERNING THIS ORDER SHOULD BE
 DIRECTED TO THE DEPARTMENT
 CONTACT.

Order Number:	CMA 0511 2688 BMS240000001 2	Procurement Folder:	1136360
Document Name:	EXTERNAL QUALITY REVIEW ORGANIZATION	Reason for Modification:	Change Order 01 To Renew Contract
Document Description:	EXTERNAL QUALITY REVIEW ORGANIZATION		
Procurement Type:	Central Master Agreement		
Buyer Name:			
Telephone:			
Email:			
Shipping Method:	Best Way	Effective Start Date:	2023-09-01
Free on Board:	FOB Dest, Freight Prepaid	Effective End Date:	2025-08-31

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000193004 QLARANT QUALITY SOLUTIONS INC 28464 MARLBORO AVENUE EASTON MD 21601 US Vendor Contact Phone: 410-822-0697 Extension: Discount Details: <table border="1"> <thead> <tr> <th></th> <th>Discount Allowed</th> <th>Discount Percentage</th> <th>Discount Days</th> </tr> </thead> <tbody> <tr> <td>#1</td> <td>No</td> <td>0.0000</td> <td>0</td> </tr> <tr> <td>#2</td> <td>No</td> <td></td> <td></td> </tr> <tr> <td>#3</td> <td>No</td> <td></td> <td></td> </tr> <tr> <td>#4</td> <td>No</td> <td></td> <td></td> </tr> </tbody> </table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Lakendra R Burdette Requestor Phone: (304) 352-4319 Requestor Email: lakendra.burdette@wv.gov <div style="text-align: center; font-size: 2em; font-weight: bold;">24</div> FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US	PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US

3-18-24 6C

Total Order Amount:	Open End
----------------------------	----------

Purchasing Division's File Copy

CH 3/18/24

PURCHASING DIVISION AUTHORIZATION
 DATE: *Tina Ke 3/18/2024*
 ELECTRONIC SIGNATURE ON FILE

ATTORNEY GENERAL APPROVAL AS TO FORM
 DATE: *John S. Gray*
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
 DATE: *Sam Gray 3-19-24*
 ELECTRONIC SIGNATURE ON FILE

3/19/2024

Extended Description:

Change Order

Change Order No. 01 is issued to renew the original contract according to all terms, conditions, prices and specifications contained in the original contract including all authorized change orders.

Effective date of renewal 09/01/2024 through 08/31/2025.

Renewal Years Remaining: 2

No other changes.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-09-01	2023-10-31		29144.48	

Commodity Line Description: Startup 2 Months

Extended Description:

Startup (2 Months) (4.1.11 - 4.1.12)

Service Period: 09/01/2023-10/31/2023

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
2	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		75950.36	

Commodity Line Description: Base Year One External Quality Review Activities (10 Months)

Extended Description:

Base Year One External Quality Review Activities (10 Months) (4.1.1)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
3	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		50227.52	

Commodity Line Description: Base Year One Development & Validation of PIP's (10 Months)

Extended Description:

Base Year One Development & Validation of Performance Improvement Projects (10 Months) (4.1.3)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
4	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		36757.08	

Commodity Line Description: BY1 Qt Analysis of Pre-Service Denial Reports (10 Months)

Extended Description:

Base Year Quarterly Analysis of Pre-Service Denial, Appeals, and Grievance Reports (10 Months) (4.1.5)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
5	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		106427.95	

Commodity Line Description: Base Year One Validation of Performance Measures (10 Months)

Extended Description:

Base Year One Validation of Performance Measures (10 Months) (4.1.2)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
6	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		120995.24	

Commodity Line Description: Base Year One Encounter Data Validation (10 Months)

Extended Description:

Base Year One Encounter Data Validation (10 Months) (4.1.4)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
7	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		61291.72	

Commodity Line Description: Base Year One Annual Technical Report (10 Months)

Extended Description:

Base Year One Annual Technical Report (10 Months) (4.1.6)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
8	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		80407.85	

Commodity Line Description: Base Year One Access to Care Standard Evaluation (10 Months)

Extended Description:

Base Year One Access to Care Standard Evaluation (4.1.8.9) (10 Months)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
9	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		230000.00	

Commodity Line Description: Base Year One Ad Hoc Reporting Services (12 Months)

Extended Description:

Base Year One Ad Hoc Reporting Services (12 Months) (4.1.9.1)

Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
10	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		230000.00	

Commodity Line Description: Base Year One Ad Hoc Technical Assistance (12 Months)

Extended Description:

Base Year One Ad Hoc Technical Assistance (12 Months) (4.1.9.3)
Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
11	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2023-11-01	2024-08-31		115000.00	

Commodity Line Description: Base Year One Quality Rating System (12 Months)

Extended Description:

Base Year One Ad Hoc Services--Quality Rating System (12 Months) (4.1.9.2)
Service Period: 11/01/2023-08/31/2024

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
12	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		78464.88	

Commodity Line Description: Optional Renewal Year One External Quality Review Activities

Extended Description:

Optional Renewal Year One External Quality Review Activities (4.1.1)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
13	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		52487.76	

Commodity Line Description: Opt. Renewal Year 1 Development & Validation of PIP's

Extended Description:

Optional Renewal Year One Development and Validation of Performance Improvement Projects (4.1.3)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
14	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		38411.16	

Commodity Line Description: Opt. Renewal Yr 1 Qtrly Analysis-Denials,Appeals,Grievances

Extended Description:

Optional Renewal Year One: Quarterly Analysis of Pre-Service Denial ,Appeals and Grievance Reports (4.1.5)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
15	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		111217.20	

Commodity Line Description: Optional Renewal Year One Validation of Performance Measures

Extended Description:

Optional Renewal Year One Validation of Performance Measures (4.1.2)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
16	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		126440.02	

Commodity Line Description: Optional Renewal Year One Encounter Data Validation

Extended Description:

Optional Renewal Year One Encounter Data Validation (4.1.4)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
17	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		64049.84	

Commodity Line Description: Optional Renewal Year One Annual Technical Report

Extended Description:

Optional Renewal Year One Annual Technical Report (4.1.6)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
18	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		84026.21	

Commodity Line Description: Optional Renewal Year 1 Access to Care Standard Evaluations

Extended Description:

Optional Renewal Year 1 Access to Care Standard Evaluations (4.1.8.9)
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
19	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		230000.00	

Commodity Line Description: Optional Renewal Year One Ad Hoc Reporting Services

Extended Description:

Optional Renewal Year One Ad Hoc Reporting Services (4.1.9) Estimated 5000 hours.
Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
20	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		230000.00	

Commodity Line Description: Optional Renewal Year One Ad Hoc Technical Assistance

Extended Description:

Optional Renewal Year One Ad Hoc Technical Assistance (4.1.9.2)
 Estimated 5000 hours.
 Service Period: 09/01/2024-08/31/2025

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
21	93151507				0.000000
	Service From	Service To		Service Contract Amount	
	2024-09-01	2025-08-31		115000.00	

Commodity Line Description: Optional Renewal Year One Quality Rating System

Extended Description:

Optional Renewal Year One Quality Rating System (4.1.9.3)
 Estimated 2500 hours
 Service Period: 09/01/2024-08/31/2025



March 1, 2024

Jimmy Dowden, WVPBC
Director, Procurement Services
WV Bureau for Medical Services
350 Capitol Street, RM 251
Charleston, WV 25301-3707

RE: WV Contract No. CMA 0511 2688 BMS 24*01 – External Quality Review Organization Services

Dear Mr. Dowden:

Qlarant Quality Solutions, Inc. ("Qlarant") agrees to renew the above-referenced existing contract to provide services to the State of West Virginia for the period 09/01/2024 through 08/31/2025. Qlarant agrees to provide services to the Bureau of Medial Services under the same terms, conditions, prices and specifications as the current contract, including all authorized change orders for external quality review activities, consistent with the pricing identified in our solicitation response dated and submitted May 31, 2023 for the Optional Renewal Year. Qlarant understands that there are two (2) additional renewal years remaining.

Attached;are the following items:

- Qlarant Quality Solutions, Inc. Certificates of Insurance;
- Certification of being a Quality Improvement Organization (QIO) – Like Entity;
- Certified Professional in Healthcare Quality certificate for Heather Smith , HEDIS Measure Analyst and Contract Manager; and
- Certified Professional in Healthcare Quality certificate for Jody Jobeck, Quality Improvement Director;

Qlarant stands ready to continue providing these critical services, as required under federal regulations, to support the State's continued success in operating its manage care programs. If anything further is required from Qlarant in connect with the renewal, please do not hesitate to contact Angela Townsend-Williams by email at Townsend-WilliamsA@Qlarant.com or by phone at (410) 763-6240.

Thank you for the opportunity to provide services to the citizens of the State of West Virginia. We look forward to another productive year.

Sincerely,

Ronald G. Forsythe, Jr., PhD
Chief Executive Officer

Agree to Renew

Cc: Bob Foley
Peter Calderwood



STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION
OFFICE OF TECHNOLOGY
State Capitol
Charleston, West Virginia 25305

Mark D. Scott
Cabinet Secretary

Joshua D. Spence
Chief Information Officer

**TO: Christopher Itson, Procurement Associate
Department of Health and Human Resources**

**FROM: Joshua D. Spence, Chief Information Officer
Office of Technology**

**SUBJECT: INFORMATION TECHNOLOGY PROCUREMENT
HR004373 BMS23*03 IS&C NUMBER: 2023-2220**

DATE: July 18, 2023

West Virginia Code §5A-6-4(a)(3) permits the Chief Technology Officer to "evaluate the economic justification, system design and suitability of information equipment and related services, and review and make recommendations on the purchase, lease or acquisition of information equipment and contracts for related services by the state spending units."

West Virginia Code §5A-6-4c requires that the Chief Technology Officer review and approve "a major information technology project."

West Virginia Code §5A-6-5 requires that "any state spending unit that pursues an information technology purchase that does not meet the definition of a 'major technology project' and that is required to submit a request for proposal to the State Purchasing Division prior to purchasing goods or services shall obtain the approval of the Chief Technology Officer, in writing, of any proposed purchase of goods or services related to its information technology and telecommunication systems.

After conducting a review of your request for a blanket MIS/OT approval for award of BMS23*03 and all optional renewals for the External Quality Review Organization (EQRO) vendor, the Office of Technology has determined:

That your request is approved.

That your request is not subject to the review and approval provisions contained in Chapter 5A, Article 6 of the Code, therefore, it does not need approval by the Office of Technology.

Keyword Search

For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

Any Words ⁽ⁱ⁾

All Words ⁽ⁱ⁾

Exact Phrase ⁽ⁱ⁾

e.g. 123456789, Smith Corp

"qlarant quality solutions inc" ×

Entity ∨

Location ∨

Status ∧

Active

Inactive

Reset 



No matches found

Your search did not return any results for active records.

Would you like to include inactive records in your search results?

Search inactive

Go back

You are viewing this page over a secure connection. Click here for more information.

West Virginia Secretary of State — Online Data Services

Business and Licensing

Online Data Services Help

Business Organization Detail

NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.

QLARANT QUALITY SOLUTIONS, INC.

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
C Corporation	11/4/1996		11/4/1996	Foreign	Non-Profit			

Organization Information			
Business Purpose	5419 - Professional, Scientific and Technical Servies - Professional, Scientific and Technical Servies - Other Professional/Scientific/Technical Services (marketing research, public opinion polling, photographic, translation & interpretation, veterinary services)		Capital Stock 0.0000
Charter County		Control Number	0
Charter State	MD	Excess Acres	0
At Will Term		Member Managed	
At Will Term Years		Par Value	0.000000
Authorized Shares	0	Young Entrepreneur	Not Specified

Addresses

Type	Address
Mailing Address	28464 MARLBORO AVE. EASTON, MD, 21601 USA
Notice of Process Address	C T CORPORATION SYSTEM 5098 WASHINGTON ST W STE 407 CHARLESTON, WV, 253131561
Principal Office Address	28464 MARLBORO AVE. EASTON, MD, 21601 USA
Type	Address

Officers

Type	Name/Address
Director	ESQ, S. ALLAN ADELMAN 28464 MARLBORO AVE. EASTON, MD, 21601
Director	CHANTE BRADY 28464 MARLBORO AVENUE EASTON, MD, 21601
President	RONALD G. FORSYTHE JR. 28464 MARLBORO AVE. EASTON, MD, 21601
Secretary	BRIAN GRISSLER 28464 MARLBORO AVENUE EASTON, MD, 21601
Treasurer	DANA FIDLER 28464 MARLBORO AVE. EASTON, MD, 21601
Type	Name/Address

Name Changes

Date	Old Name
3/14/2018	DELMARVA FOUNDATION FOR MEDICAL CARE, INC.
Date	Old Name

Date	Amendment
3/14/2018	NAME CHANGE: FROM DELMARVA FOUNDATION FOR MEDICAL CARE, INC.
Date	Amendment

Annual Reports	
Filed For	
2023	
2022	
2021	
2020	
2019	
2018	
2017x	
2017	
2016	
2015	
2014	
2013	
2012	
2011	
2010	
2009	
2008	
2006	
2005	
2004	
2003	
2002	
2002	
2001	
1999	
1998	
Date filed	

[File Your Current Year Annual Report Online Here](#)

For more information, please contact the Secretary of State's Office at 304-558-8000.

Monday, March 18, 2024 — 9:03 AM

© 2024 State of West Virginia

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop S3-02-01
Baltimore, Maryland 21244-1850



Ronald G. Forsythe, Jr., PhD
Chief Executive Officer
Qlarant Quality Solutions, Incorporated
28464 Marlboro Avenue
Easton, Maryland 21601-2732

Dear Mr. Forsythe:

We have reviewed your application of December 16, 2022 requesting that the Centers for Medicare & Medicaid Services certify Qlarant Quality Solutions, Incorporated of Maryland as a Quality Improvement Organization (QIO)-like entity for the State of Maryland. As a result of this review, we have determined that Qlarant Quality Solutions, Incorporated Of Maryland meets the requirements to be a QIO-like entity, namely:

- It is able to perform limited medical and quality review functions required under Section 1154 of the Act;
- It has one individual who is representative of health care providers and consumers on its governing body under section 1152 of the Act; and
- It is not a health care facility, health care facility affiliate, or payor organization as defined in 42 CFR 475.105.

This certification designates Qlarant Quality Solutions, Incorporated of Maryland as a QIO-like entity eligible to fully operate in Maryland. Qlarant Quality Solutions, Incorporated of Maryland may also operate in other states with the exception of performing Medicare medical reviews. For the conduct of Medicare medical review work, a QIO-like entity must meet the requirement that the QIO-like entity have access to or agreements with peer reviewers in the state in question.

If the QIO-like entity determines to conduct Medicare medical review work in a state other than the state for which it has submitted a list of medical reviewers, this criterion must be met and submitted for approval by CMS before such work can be undertaken.

Your certification is granted for a period of 5 years and will expire on February 23, 2028.

This certification of eligibility permits your organization to seek a contract with the states for review activities within the requirements. In addition, states have specific qualifications and performance requirements depending upon the scope of work they desire to procure. This certification does not reflect a determination as to whether your organization has the ability to meet those requirements. The state is responsible for making that determination.

We have certified your organization to review cases and analyze patterns of care related to medical necessity and quality review. We have not certified the organization as meeting the State Medicaid Agency's requirements for external quality review or related functions such as utilization review specified in 1903(a)(3)(c) and 1932(c)(2) of the Act. In addition, we have not evaluated the organization to perform the same functions as a QIO under contract with CMS.

You must provide an annual assurance statement of your continued adherence to certification requirements within 30 days of the last month of the first certification year and within 30 days of the last month of the second certification year. In addition, if there are any changes in the name, address, or pool of physician reviewers you must notify this office for a reevaluation of your certification. Recertification requires submission of the complete package a minimum of 60 days prior to the expiration of the current certification.

At any time during the certification period if Qlarant Quality Solutions, Incorporated of Maryland no longer meets the above criteria, you must notify the agency and it will no longer be considered a QIO-like entity. The certification will be terminated. You may reapply at any time if this occurs.

If you have questions, please contact Malinda Greene of my staff on (410) 786-7829 or Email, malinda.greene@cms.hhs.gov.

**Ronald R.
West -S**

Digitally signed by
Ronald R. West -S
Date: 2023.02.21
19:21:53 -05'00'

Sincerely,

Renee Dupee, Director
Division of Transforming Clinical Practices
Community Coalitions Quality Improvement Program

Healthcare Quality Certification Commission



This Certifies That

Heather Smith

Having met the standards established by the Healthcare Quality Certification
Commission and passed the written examination has attained the designation of

Certified Professional in Healthcare Quality

Certification ID: 355596

Certified through 12/31/2025

Accredited by the
National Commission for Certifying Agencies
A Division of The National Organization
for Competency Assurance

Chair of the Commission

A handwritten signature in cursive script, appearing to read 'April A. Taylor'.

Healthcare Quality Certification Commission



This Certifies That

Jody A Jobeck

Having met the standards established by the Healthcare Quality Certification Commission and passed the written examination has attained the designation of

Certified Professional in Healthcare Quality

Certification ID: 93337

Certified through 12/31/2024

Accredited by the
National Commission for Certifying Agencies
A Division of The National Organization
for Competency Assurance

Chair of the Commission

A handwritten signature in cursive script, appearing to read 'April M. Taylor'.

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>Crystal Husted</u> Date: <u>3/18/24</u> Solicitation No. <u>CMA BMS24*01</u>	Agency: BMS Procurement Officer Submitting Requisition: Althea Greenhowe Requisition No. CMA 0511 BMS24*1 PF No.: 1136360
--	--

This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

FOR ALL SOLICITATION TYPES:

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CRQM → CMA]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions (www.state.wv.us/admin/purchase/TCP.pdf)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
10	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FOR CHANGE ORDERS/RENEWALS:

1	Two-party agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Office of Technology CIO approval	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

*The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.

For Purchasing Division Use Only:

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: _____

Crystal Husband

REFERENCE:

FOR ALL SOLICITATION TYPES:

1. **Specifications and Pricing Page.** The specifications and intended pricing evaluation tool (wvOASIS line or pricing page) must be attached to the requisition for the Purchasing Division to review them.
2. **Usage of correct specification template.** The Purchasing Division maintains standard format templates on its website for various purchase types, including but not limited to one-time, services, and open-end RFQ purchases; RFPs; and EOs. Using the correct specification template ensures language appropriate for the type of purchase will be contained in the final contract. A copy of these templates can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/forms.html.
3. **Use of correct requisition type.** Agencies must discern the type of contract needed prior to entering the requisition in wvOASIS. The requisition type will limit the type of award that can be issued for each solicitation. **Purchasing Division Procedures Handbook, Section 3.3.1.1.**
4. **Terms and conditions.** The agency must complete the General Terms and Conditions using the master copy maintained by the Purchasing Division, and the revision date on the terms and conditions document must not be removed or altered in any way. The Purchasing Master Terms and Conditions can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/TCP.pdf. **Purchasing Division Procedures Handbook, Section 3.2.4.6.**
5. **Maximum budgeted amount.** This is the maximum amount of funding available for the purchase of the good or service as determined by the agency prior to requisition submission. This amount determines the agency's ability to negotiate and cannot be changed after the bid opening. **Purchasing Division Procedures Handbook, Section 6.9.3.1.**
6. **Suggested vendors.** Suggested vendors are identified at the time an agency conducts its market research and are placed in the Vendor List or Free Form Vendor fields within the requisition. This ensures the vendors are made aware of the bidding opportunity.
7. **Capitol Building Commission pre-approval.** Pre-approval from the Capitol Building Commission is required before any contract can be bid for work requiring a substantial physical change to the state capitol building or surrounding complex, before work begins to a building on the capitol complex if not done under a contract, and prior to processing change orders for work to buildings on the capitol complex above \$40,000. **Purchasing Division Procedures Handbook, Section 7.2.**
8. **Financing pre-approval.** Any loan or extension of credit from a bank or other financial institution by any state agency under the Executive Branch requires pre-approval from the Governor's Office and must be in the best financial interest of the state of West Virginia. **Per memorandum from the Governor's Office.**
9. **Fleet Management Division pre-approval.** Pre-approval by the Fleet Management Division (FMD) is required to purchase vehicles, unless statutorily exempt. Any request made under the authority of the Fleet Management Division to increase an agency's fleet size must be approved by the FMD executive director, and all vehicle purchases, regardless of dollar amount, must be processed through the Purchasing Division. **Purchasing Division Procedures Handbook, Section 7.8.**
10. **Insurance requirements.** **RE Purchasing Division Procedures Handbook, Section 3.2.5.3. Appendix C.**
11. **Office of Technology CIO pre-approval.** In accordance with the Office of Technology's CIO-19-001 policy, all technology procurement requests, unless exempted, require Chief Information Officer (CIO) approval. **Purchasing Division Procedures Handbook, Section 7.3.**
12. **Treasurer's Office (banking) pre-approval.** Pre-approval is required by the State Treasurer's Office for the acquisition of banking goods or services, which includes but may not be limited to accepting payments and receiving funds via electronic commerce. **W. Va. Code §§ 12-1-7 and 12-3A-6.**

FOR CHANGE ORDERS/RENEWALS:

1. **Two-party agreement.** This agreement, confirming the need for the change order, must be signed by both the agency and the vendor. A single letter of agreement with both signatures is standard.
2. **Standard change order language.** The Purchasing Division maintains standard language to be used in the Extended Description field when issuing a change order in wvOASIS. There are various descriptors available to address the change to the original contract, including but not limited to a standard renewal, a renewal with an increase or decrease, a construction extension for time only or time and increase, a cancellation, and an administrative change. **Purchasing Division Procedures Handbook, Appendix D.**
3. **Office of Technology CIO pre-approval.** See #11.
4. **Justification for price increases/backdating/other.** Any change order request that increases the amount of the contract, is backdated more than 20 days past the submission date of the change order, or otherwise affects provisions of the contract not typically seen in a change order requires justification.
5. **Bond rider.** A bond rider allows bonded principals to request changes to be made to their original surety bond agreements. The bond rider is the only valid way of making changes to a bond agreement which does not invalidate the agreement.
6. **Secretary of State verification.** Unless a waiver is obtained from the Secretary of State's Office, every vendor organized as a business entity must have a certificate of authority and be in good standing with the Secretary of State's Office. To search for a business with the Secretary of State's Office, visit <http://apps.sos.wv.gov/business/corporations>. Any vendor that cannot be found or shows a status of "revoked" or "dissolved" is not eligible for award until the issue is resolved. Agencies must verify this compliance manually prior to award and include a copy of the relevant record in the agency file. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. E. Secretary of State.**
7. **State debarment verification.** Pursuant to *West Virginia Code* §5A-3-33c and 33d, the State of West Virginia and its political subdivisions may not solicit offers from, award contracts to, or consent to subcontract with a debarred vendor during the debarment period. A list of vendors debarred by the West Virginia Purchasing Division can be seen online at www.state.wv.us/admin/purchase/debar.html. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. D. State Debarment.**
8. **Federal debarment verification.** Vendors must verify that a vendor is not debarred by the federal government prior to awarding a contract by visiting Sam.gov. Instructions for manually checking a vendor's federal debarment status can be found online at https://www.fsd.gov/gsafsd_sp?id=kb_article_view&sysparm_article=KB0036199&sys_kb_id=b372dadb1b4ac5d40ca4a97ae54bcbb2&spa=1. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. C. Federal Debarment.**

Questions regarding this *Compliance Verification Checklist for Requisition Submission* may be directed to your assigned Purchasing Division buyer. If you're unsure who your buyer is, see the Agency-Buyer assignments published online at www.state.wv.us/admin/purchase/byrassign.pdf.