



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

State of West Virginia Delivery Order

Order Date: 03-04-2024

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:	CDO 0803 0081 DOT2300000032 3	Procurement Folder:	1191158
Document Name:	E-Permitting Portal Project (81230102)	Reason for Modification:	Change Order 1 To Extend Contract
Document Description:	CO 1 E-Permitting Portal Project (81230102)		
Procurement Type:	Central Delivery Order		
Buyer Name:	John W Estep		
Telephone:	304-558-2566		
Email:	john.w.estep@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0803 DOT2300000003 3
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR		DEPARTMENT CONTACT		
Vendor Customer Code:	000000161706	Requestor Name:	Sidney Oliver	
DATABANK IMX LLC PO Box 829878		Requestor Phone:	304-414-7119	
Philadelphia PA 19182-9878		Requestor Email:	jr.oliver@wv.gov	
US		<div style="font-size: 48px; font-weight: bold;">24</div> <div style="font-weight: bold;">FILE LOCATION _____</div>		
Vendor Contact Phone:	561-222-0101			Extension:
Discount Details:				
#1	No	0.0000	0	
#2	No			
#3	No			
#4	No			

INVOICE TO	SHIP TO
INFORMATION TECHNOLOGY DIVISION DEPT. OF TRANSPORTATION 1900 KANAWHA BLVD E, BLD. 5 RM-720 CHARLESTON WV 25305 US	INFORMATION TECHNOLOGY DIVISION DEPT. OF TRANSPORTATION 1900 KANAWHA BLVD E, BLD. 5 RM-720 CHARLESTON WV 25305 US

Total Order Amount:	\$282,030.00
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Purchasing Division's File Copy

JE 3/28/24
 PURCHASING DIVISION AUTHORIZATION
 DATE: *T. Waugh* 4/15/2024
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
 DATE: *Sidney Oliver* 4-5-24
 ELECTRONIC SIGNATURE ON FILE

Extended Description:

Change Order

Change Order No. 1 is issued to extend the original contract to 06/01/24 according to all terms, conditions, prices, and specifications contained in the original contract including all authorized change orders.
The extension of this contract is provided to complete the project only.

Effective Date of Change: 03/01/2024

No other changes.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	43232200	0.00000		\$0.0000	\$48,090.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-03-15	2024-06-01				

Commodity Line Description: Business Consultant - Professional Services

Extended Description:

Business Consultant - Professional Services
229 hours @ \$210.00/ hr

Extend end date to 6/1/24

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	43232200	0.00000		\$0.0000	\$187,110.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-03-15	2024-06-01				

Commodity Line Description: Database Engineer - Professional Services

Extended Description:

Database Engineer - Professional Services
891 hours @ \$210.00/ hr

Extend end date to 6/1/24

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	43232200	0.00000		\$0.0000	\$46,830.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-03-15	2024-06-01				

Commodity Line Description: Program Manager - Professional Services

Extended Description:

Program Manager - Professional Services
223 hours @ \$210.00/ hr





Extend end date to 6/1/24

Project Delivery Order.

Company Name	West Virginia Department of Transportation
Project Name	E-Permitting Portal
Delivery Order ID	1b
Date	02/29/24

Type and Priority of Requested Change			
Type Of Change Requested (Check all that apply)		Priority (Check ONE)	
<input type="checkbox"/>	Scope Change	<input checked="" type="checkbox"/>	Critical
<input checked="" type="checkbox"/>	Schedule Change	<input type="checkbox"/>	High
<input type="checkbox"/>	Budget Change	<input type="checkbox"/>	Normal
<input checked="" type="checkbox"/>	PO Adjustment Needed	<input type="checkbox"/>	Low
<input type="checkbox"/>	New PO Required		
<input type="checkbox"/>	Design Change		
Details of Requested Change			
Reason For Additional Order: The project timeline is being extended from 3/14/24 to 6/1/24 to accommodate additional design discussions and staff vacation schedules.			
Functional Impact of Change: None			
Technical Impact of Change: None			
Project Estimate: Contract# CDO DOT2300000032 There are no cost or pricing changes needed to support the timeline change. Current estimate for production go-live is 06/01/24.			

Delivery Order Approval

 <Client Contact>	 Approval Date
 DataBank Project Manager	 Approval Date



**WEST VIRGINIA DEPARTMENT
OF TRANSPORTATION**

BUDGETARY ESTIMATE

E-PERMITTING PORTAL PROJECT

MARCH 6, 2023



DataBank
A KYOCERA GROUP COMPANY

SOLUTION OVERVIEW

West Virginia Department of Transportation (hereinafter “Customer” or “Client”) is seeking a Permitting Portal solution built on their existing OnBase platform. This process will begin with an applicant accessing the WV DOT developed Portal in order to submit an application via an OnBase Unity Form. Once submitted, this application will route through an OnBase Workflow for various levels of approval and review. Upon completion of the Workflow process, the results will be communicated back to the original applicant. While there are multiple departments and processes that will ultimately need this solution, the initial focus of this project is for the Entry Permitting and related MM109 Form based processes.

Customer will be leveraging DataBank IMX, a Kyocera Company (hereinafter “DataBank”) to design, implement, and support the solution.

PROJECT OVERVIEW AND SCOPE

- **OnBase Taxonomy and Configuration**
 - Standard OnBase configuration for Document Types, Keywords, Autofill Keyword Sets, Custom Queries, File Cabinets, and Capture Methods (VPD, Acquisition) – along with User Group security configuration.
- **Permit Application Portal**
 - This will be developed and maintained by WV DOT and will launch the appropriate Unity Form for the applicant (with data injection). This portal may also be used for delivering content back to the applicant (in addition to email).
 - The general concept of the portal is that it will provide a persistent login (or anonymous access) for applicants to submit permit applications. Upon starting an application, the user will be presented with a series of (wizard style) questions via the portal, which will ultimately determine which specific application, and designated Unity Form, is needed (or allow for direct launch of Unity Form). The portal code will then call/open the chosen Unity Form, and pass any/all relevant data (e.g. User ID, Name) into the Unity Form (via URL coding) for presentation to the user to complete. The user will then complete the Unity Form, which will submit directly into OnBase and the workflow.
 - One potential difficulty area is around the ability for a submitter to save & continue a form. This would only be possible for submitters that have created an account on the portal, but if they did then it would require some form of submitting the form, then allowing a link back to the form from the portal that they could re-open and complete. There would also need to be some mechanic of allowing for an override of required fields for this scenario, and a workflow recognition of this happening. Overall, it is possible, but in a work-around way and would take some considerable time to accomplish.
 - In addition to the primary Unity Form launch function, it is also desired to create a SQL View of OnBase data that can be accessed via the portal for presentation to the user as desired by WV DOT.
 - While not definitely a part of this scope, it has also been discussed that this portal will surface specific OnBase content (e.g. Plans, MM109) to the user via DocPop or QueryPop methods. At this point, this effort should be considered likely (but still optional), and therefore in scope until determined otherwise. This may also need to include the ability for additional OnBase upload capability (via Sweep, or Upload portlet).
 - It is also worth noting that this portal will be doing additional functions, but the scope of this project should be limited to the above-described needs.



- **Application Forms**

- These will be built as Unity Forms. These forms will act as the primary workflow document, continue to allow for internal only data entry during the workflow and output to the MM109 form for completion.
- Within the Entry Permit program, there are multiple sub-types, which are listed below. It has not yet been determined whether it is best for each sub type to have its' own Unity Form, some concatenation of forms with dynamic presentation based on the sub-type, or a single dynamic form. However, it is believed that a single form per sub-type will be the easiest to maintain over time, even if it does create the most potential initial configuration (which should be minimized due the mostly repetitive nature of the forms across the sub-types).
 - **Residential:** Loosely considered the baseline standard version of the form.
 - **Commercial:** Similar, but some additional fields.
 - **Drilling:** Some additional Drilling specific fields.
 - **Industrial:** Some additional Industrial specific fields.
 - **Logging:** Some additional Logging specific fields.
 - **Oil & Gas:** Some additional Oil & Gas specific fields.
 - **Utilities:** Some additional Utilities specific fields.
 - **Temporary**
 - **Miscellaneous**
- As stated in the Portal section, it is expected that these Unity Forms will be launched via the portal once the correct form type has been determined, and that it will pass in any/all relevant data to the form. The user will then complete the form and submit it into OnBase.
- The following additional components should also be considered in scope:
 - **Processing Tab:** An additional Tab or Section to account for internal processing. This will likely take the form of a checklist with some data fields to be filled out by WV DOT as the process the application, along with any relevant automated Workflow detail.
 - **Map Lookup:** The concept is for the user to be able to click a button to locate the property in question on a map, which will subsequently autofill the Latitude & Longitude (along with any other relevant & Available data) onto the form.
 - **NOTE:** The exact requirements for this functionality and level of effort will need to be determined during the Discovery sessions.
 - **NOTE:** This may be something WV DOT can do as part of the portal and pass into the Unity Form.

- **Processing Workflow**

- Upon application submission, the processing workflow will manage the multiple routing and approval stages, and allow for deviation from the main process as needed by application type. At the conclusion of the workflow, an email will be delivered to the original applicants with relevant data in the email body and attached documents. This will also involve some version of electronic signature.
- Workflow scope will include:
 - **Lifecycle:** 1
 - **Queues:**
 - **Initial:** Any automated ingestion logic
 - **Intake:** Triage and assignment
 - **Review:** Document & Application review, site visits, data gathering, etc.
 - **Applicant Update:** Email communication with applicant to fix/update application



- **OA:** Return to OA for further processing.
- **Final Review**
- **Engineer & Other Approval/Review:** Queues, with sub type specific routing rules
- **Completion:** Any/All final processing steps
 - **CSV Data Output:** Data feed for State Treasurer (Invoice #, Permit #, Total Amount, etc.)
 - **Email To Applicant:** Email must include document attachments, email template, and fully editable Email body (primarily to include a list of deficiencies or manual detail)
- **Additional Content & Data:** Ability to add documents, and data on the Unity Form (including checklist)
- **Letter Composition:** (Details in Document Composition section)
- **MM109 Conversion:** Application Unity Form must be converted to MM109 format (PDF like)
- **Signature:** The exact signature needs have not been fully defined, but what is known is that there must be some accounting for the ability of internal reviewers/approvers to 'sign' the application. There has been discussion of using AdobeSign or DocuSign, Unity Form Signatures, OnBase PDF Sign functions, and even Workflow Tasks as signatures. This requirement will need to be determined during Discovery before exact scope can be accounted for.
- **Auto Void:** If in process 1+ year
- **Email Reminders:** Not expected to be in scope.
- **Print Case Documents:** To allow them to be taken into the field if necessary.
- **Image Form Support:** Workflow must support process for initial receipt of paper form.
- **Invoice Matching:** Would involve generation of invoice data and individual objects, which would also be converted to PDF and printed in the background. Then an import of CSV data into individual html forms for matching as a distinct part of workflow. This is the next stage of the CSV output to the Treasurer. Likely will require a dedicated Lifecycle & OnBase Auto-fill Keyword Set functionality for this capability.
- **OPTIONAL 1 – Packet Creation:** If documents need to be combined into a single packet for distribution to the applicant. This is not currently included in the budgetary estimate scope.
- **Document Composition**
 - Per the conclusions of the application process, Doc Comp will be used to compose letters for delivery back to the applicant.
 - Document Composition Templates:
 - **Approval**
 - **Reasons Can't Approve**
 - **Extension**
 - **Voided**
 - **Additional Information Required (Possible)**



PRICING BREAKDOWN

Professional Services Estimate

Description	Contract Item No	Estimated Hours	Rate	Estimated Cost
Business Consultant – Professional Services	4.1.7.1.2.2	229.0	\$210.00	\$48,090.00
Database Engineer – Professional Services	4.1.7.1.2.4	891.0	\$210.00	\$187,110.00
Program Manager – Professional Services	4.1.7.1.2.9	223.0	\$210.00	\$46,830.00
Professional Services Estimate Total		1343.0	\$210.00	\$282,030.00

Note: All estimates of fees or time required to complete the project are approximations of the anticipated amount of time needed to complete the project. Client will be invoiced based on the amount of time actually required to complete the project. DataBank will bill monthly for services performed.

It is important to note that scope can change throughout the lifecycle of a project requiring the use of DataBank's change order process. DataBank recommends Client add a contingency reserve of 20% of total project estimate to account for change orders and additional request uncovered during the Discovery.

PROJECT ASSUMPTIONS

1. This estimate is subject to changes in the price for software and licenses, maintenance, and Professional Services upon completion of Discovery and DataBank receiving enough information, sample documents, requirements, etc.. to properly price the solution.
2. Discovery is required in order to develop and issue an Implementation SOW (Statement of Work) that will define the solution development and implementation effort. The SOW issued upon completion of the discovery effort will reflect the final services pricing required to deliver the solution.
3. Budgetary Estimate includes the following tasks for discovery and design:
 - Conduct Discovery sessions with Client Subject Matter Experts (SMEs) and technical experts from IT, interfaces, and applications to identify business and technical requirements.
 - Draft Solution Design Document (SDD) and review with Client.
4. Budgetary Estimate includes the following tasks for solution configuration:
 - Infrastructure Setup
 - DMZ Server Setup Assistance
 - Basic OnBase components
 - Disk Group (1)
 - Document Type Group (1)
 - Document Types (30)
 - Keywords (30)
 - User Security Group (1)
 - Users (7)
 - Capture



- Unity Acquisition, VPD, Sweep
 - Autofill Keyword Sets (1)
 - Custom Queries (3)
 - Foldering
 - File Cabinet (1)
 - Child (1)
 - Workflow
 - Lifecycles (1)
 - Queues (15)
 - Ad-hoc Tasks (30)
 - Notifications (3)
 - Timers (3)
 - Portfolio Relations (WF Folder)
 - Document Composition Templates (5)
 - DIP (1)
 - Electronic Forms (up to 10)
 - Application
 - Residential
 - Commercial Drilling
 - Commercial Industrial
 - Commercial Logging
 - Commercial Oil & Gas
 - Commercial Utilities
 - Temporary
 - Miscellaneous
 - Digital Signatures
 - Potential to use Adobe, DocuSign, or Unity Form
 - MM109 Conversion
 - Output as PDF (Image Form)
5. Budgetary estimate includes the following tasks for testing:
- Unit testing
 - Create test scripts for User Acceptance Testing (UAT)
 - User Acceptance Testing (UAT) Support
6. Budgetary estimate includes the following tasks for training:
- Create training materials
 - UAT training for super users
 - End user training
7. Budgetary estimate includes the following tasks for production deployment:
- Migration of the solution to the Production environment
 - Go-live support
 - Create system information document
8. Budgetary estimate includes the following tasks for project management:
- Setup the project in the internal PSA system
 - Coordinate DataBank technical team personnel and schedules
 - Manage the project budget and invoicing
 - DataBank will schedule a project kick-off meeting to introduce project resources and review the project plan with Client
 - Ongoing planning and coordination
 - Lead weekly status meetings with the project team
 - Preparation of weekly status reports
 - Status reporting to Client Project Manager
 - Project Plan management



EXHIBIT A - PRICING PAGE

Content Management Software and Professional Services								
LOCATION: BUILDING 5, ROOM A-720, CHARLESTON, WV 25305								
Contract Item Number	Description	Unit of Measure	Estimated Quantity*	Unit Cost				Extended Cost
				Year One	Optional - Year Two	Optional - Year Three	Optional - Year Four	
4.1.2	Hyland OnBase Essential User License Part # ONB-SUB-DW or equal (25 users)	EA		\$689.17	\$689.17	\$689.17	\$689.17	
4.1.2	Hyland OnBase Essential User License Part # ONB-SUB-DW or equal (26-50 users)	EA		\$650.88	\$650.88	\$650.88	\$650.88	
4.1.2	Hyland OnBase Essential User License Part # ONB-SUB-DW or equal (51-100 users)	EA		\$593.46	\$593.46	\$593.46	\$593.46	
4.1.2	Hyland OnBase Essential User License Part # ONB-SUB-DW or equal (101-200 users)	EA		\$526.45	\$526.45	\$526.45	\$526.45	
4.1.2	Hyland OnBase Essential User License Part # ONB-SUB-DW or equal (201-500 Users)	EA		\$440.31	\$440.31	\$440.31	\$440.31	
4.1.2	Hyland OnBase Essential User License Part # ONB-SUB-DW or equal (501+ Users)	EA		\$373.30	\$373.30	\$373.30	\$373.30	
4.1.3	Hyland OnBase Standard User License Part # ONB-SUB-PW or equal (25 users)	EA		\$918.89	\$918.89	\$918.89	\$918.89	
4.1.3	Hyland OnBase Standard User License Part # ONB-SUB-PW or equal (26-50 users)	EA		\$880.60	\$880.60	\$880.60	\$880.60	
4.1.3	Hyland OnBase Standard User License Part # ONB-SUB-PW or equal (51-100 users)	EA		\$823.18	\$823.18	\$823.18	\$823.18	
4.1.3	Hyland OnBase Standard User License Part # ONB-SUB-PW or equal (101-200 users)	EA		\$756.17	\$756.17	\$756.17	\$756.17	

EXHIBIT A - PRICING PAGE

Content Management Software and Professional Services								
LOCATION: BUILDING 5, ROOM A-720, CHARLESTON, WV 25305								
Contract Item Number	Description	Unit of Measure	Estimated Quantity*	Unit Cost				Extended Cost
				Year One	Optional - Year Two	Optional - Year Three	Optional - Year Four	
4.1.3	Hyland OnBase Standard User License Part # ONB-SUB-PW or equal (201-500 users)	EA		\$670.03	\$670.03	\$670.03	\$670.03	
4.1.3	Hyland OnBase Standard User License Part # ONB-SUB-PW or equal (501+ users)	EA		\$603.02	\$603.02	\$603.02	\$603.02	
4.1.4	Hyland OnBase Premier User License Part # ONB-SUB-KW or equal (25 users)	EA		\$1,148.62	\$1,148.62	\$1,148.62	\$1,148.62	
4.1.4	Hyland OnBase Premier User License Part # ONB-SUB-KW or equal (26-50 users)	EA		\$1,110.33	\$1,110.33	\$1,110.33	\$1,110.33	
4.1.4	Hyland OnBase Premier User License Part # ONB-SUB-KW or equal (51-100 users)	EA		\$1,052.89	\$1,052.89	\$1,052.89	\$1,052.89	
4.1.4	Hyland OnBase Premier User License Part # ONB-SUB-KW or equal (101-200 users)	EA		\$985.89	\$985.89	\$985.89	\$985.89	
4.1.4	Hyland OnBase Premier User License Part # ONB-SUB-KW or equal (201-500 users)	EA		\$899.75	\$899.75	\$899.75	\$899.75	
4.1.4	Hyland OnBase Premier User License Part # ONB-SUB-KW or equal (501+ users)	EA		\$832.74	\$832.74	\$832.74	\$832.74	

EXHIBIT A - PRICING PAGE

Content Management Software and Professional Services								
LOCATION: BUILDING 5, ROOM A-720, CHARLESTON, WV 25305								
Contract Item Number	Description	Unit of Measure	Estimated Quantity*	Unit Cost				Extended Cost
				Year One	Optional - Year Two	Optional - Year Three	Optional - Year Four	
4.1.5	Hyland OnBase Integration for WVDOT DocuSign eSignature Part # ONB-INTG1-11 or equal	EA		\$4,594.46	\$4,594.46	\$4,594.46	\$4,594.46	
4.1.6	Hyland OnBase Integration for WVDOT ESRI ArcGIS Server Part # ONB-INTG1-14 or equal	EA		\$4,594.46	\$4,594.46	\$4,594.46	\$4,594.46	
4.1.7.1.2.1	Advanced Capture Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.2	Business Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.3	Conversion Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.4	Database Engineer - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.5	Enterprise Solutions Consultant - Professional Services	EA		\$0.00	\$0.00	\$0.00	\$0.00	
4.1.7.1.2.6	Infrastructure Analyst - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.7	Integration Engineer - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.8	Principal Consultant - Professional Services	EA		\$0.00	\$0.00	\$0.00	\$0.00	

EXHIBIT A - PRICING PAGE

Content Management Software and Professional Services
LOCATION: BUILDING 5, ROOM A-720, CHARLESTON, WV 25305

Contract Item Number	Description	Unit of Measure	Estimated Quantity*	Unit Cost				Extended Cost
				Year One	Optional - Year Two	Optional - Year Three	Optional - Year Four	
4.1.7.1.2.9	Program Manager - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.10	Technical Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.11	Hyland OnBase System Administrator Training or equal	EA		\$2,720.40	\$2,720.40	\$2,720.40	\$2,720.40	
4.1.7.1.2.12	Hyland OnBase Introduction to Workflow Training or equal	EA		\$2,740.00	\$2,740.00	\$2,740.00	\$2,740.00	
4.1.7.1.2.13	Hyland OnBase Premium Subscription or equal (Pricing should be based on 25 Essential User Licenses)	LS		\$604.53	\$604.53	\$604.53	\$604.53	

* The estimated purchase volume for new licenses represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

** TRAVEL: Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.

***Optional Renewals- Year Two through Year Four may be renewed by Change Order upon mutual agreement between the Vendor and Agency.

Glenn Walther
DataBank IMX

Vendor Signature

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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.

DATABANK IMX LLC

See ATTACHEI

Organization Information									
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason	
LLC Limited Liability Company	7/12/2022		7/12/2022	Foreign	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				
Charter County	Kanawha			Control Number	0				
Charter State	WV			Excess Acres					
At Will Term	A			Member Managed	MBR				
At Will Term Years	Par Value								

Authorized Shares	Young Entrepreneur	No

Addresses	
Type	Address
Designated Office Address	458 PIKE ROAD HUNTINGDON VALLEY, PA, 19006
Mailing Address	458 PIKE ROAD HUNTINGDON VALLEY, PA, 19006 USA
Notice of Process Address	DATABANK IMX LLC 458 PIKE ROAD HUNTINGDON VALLEY, PA, 19006
Principal Office Address	458 PIKE ROAD HUNTINGDON VALLEY, PA, 19006 USA
Type	Address

Officers	
Type	Name/Address
Member	MATTHEW CHARLSON 458 PIKE ROAD HUNTINGDON VALLEY, PA, 19006
Type	Name/Address

Annual Reports
Filed For
2023
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.

Thursday, March 28, 2024 — 9:24 AM

Vendor/Customer

Address

Address Type	Street 1	City	State/Province	Zip/Postal Code	Principal Contact
Ordering	458 PIKE RD	HUNTINGTON VALLEY	PA	19006-1610	GLENN WALTHER
Payment	PO Box 829878	Philadelphia	PA	19182-9878	Glenn Walther
Ordering	PO Box 829878	Philadelphia	PA	19182-9878	Glenn Walther

First Prev Next Last

Save [Undo](#) Delete Insert [Copy](#) Paste

Vendor/Customer : 000000161706

DATABANK IMX LLC

Address Type : Ordering

Division/Department :

Additional Address Info. :

Prevent New Spending :

Default Currency : USD - US Dollar

Active From : 07/08/2022

Active To : 10/18/2022

Default Record :

Mail Returned :

Active Address : No

Address Information

Address ID : AD000001

Street 1 : 458 PIKE RD

Street 2 :

City : HUNTINGTON VALLEY

State/Province : PA

Zip/Postal Code : 19006-1610

DUNS :

Extended DUNS :

Unique Entity Identifier :

CAGE Code :

Country Phone Code : 1

Phone : 800-873-9426

Phone Extension :

County :

County Name :

Country : US

Prenote/EFT

Remittance Advice

Contact Information

Contact Address Information

Geographic Designation

Change Management

[Top](#)

[Modify Existing Record](#) [Add New Address](#)

[Master Address](#)

[Master Contacts](#)

[Languages](#)

[Vendor Transaction History](#)

Search All Words e.g. 1606N020Q02

Please Sign In: You must sign in to your SAM.gov account to search Entities, Responsibility/Qualification and the Disaster Response Registry.

Select Domain
Entity information

All Entity Information

Entities

Disaster Response Registry

Responsibility / Qualification

Exclusions

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Keyword Search

For more information on how to use our keyword search, visit our [help guide](#)

Simple Search

Search Editor

- Any Words
- All Words
- Exact Phrase

Entity

Entity Name

No results found

CAGE / NCAGE

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?

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>J. ESTEP</u> Date: <u>3/20/24</u>	Agency: WVDOT
Solicitation No. <u>CDO DOT23*32</u> <u>Co#1</u>	Procurement Officer Submitting Requisition: Dusty Smith
	Requisition No. CDO DOT23*32
	PF No.: 1191158

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 checked="" type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

FOR CHANGE ORDERS/RENEWALS:

13	Two-party agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14	Standard change order language	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16	Justification for price increases/backdating/other	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
19	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20	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: _____



REFERENCE:

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 EOIs. 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.**
13. **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.
14. **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.**
15. **Office of Technology CIO pre-approval.** See #11.
16. **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.
17. **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.
18. **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.**
19. **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.**
20. **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/qsafsd_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.