



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: 05-28-2024

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 4	Procurement Folder:	1191158
Document Name:	E-Permitting Portal Project (81230102)	Reason for Modification:	Change Order 2 To Extend and Increase Contract
Document Description:	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 4
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	INFORMATION TECHNOLOGY DIVISION DEPT. OF TRANSPORTATION 1900 KANAWHA BLVD E, BLD. 5 RM-720
CHARLESTON WV 25305	CHARLESTON WV 25305
US	US

Purchasing Division's File #

Total Order Amount:	\$334,530.00
----------------------------	--------------

JE 6/11/24
 PURCHASING DIVISION AUTHORIZATION
 DATE: 6-12-24
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
 DATE: 6-12-24
 ELECTRONIC SIGNATURE ON FILE

Extended Description:

Change Order

Change Order No. 2 is issued to extend original contract to 8/1/2024 according to all terms, conditions, and specifications contained in the original contract and all authorized change orders, except that the contract Line item 2 Database Engineer - Professional services is increased as defined in the attached SOW documentation.

Effective date of change: 5/28/2024

Original Contract Total: \$282,030.00
Change Order No. 2 Increase \$52,500.00 or 250 hours

New Contract Total: \$334,530.00

No other changes.

All provisions of the original Contract and subsequent Change Orders not modified herein shall remain in full force and effect.

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	2024-08-01				

Commodity Line Description: Business Consultant - Professional Services

Extended Description:

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

Extend end date to 8/1/24

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	43232200	0.00000		\$0.0000	\$239,610.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-03-15	2024-08-01				

Commodity Line Description: Database Engineer - Professional Services

Extended Description:

Database Engineer - Professional Services
Orig: 891 Hours @ \$210.00/hr
Revised: 1141 hours @ \$210.00/ hr (Increase +250 hours)

Extend end date to 8/1/24

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	2024-08-01				

Commodity Line Description: Program Manager - Professional Services

Extended Description:

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

Extend end date to 8/1/24

State of West Virginia
Purchasing Division

Blanket Release Order

Release # 81230102	Req. Date 05/28/24	Buyer	PURCHASING DIVISION'S USE ONLY	
WVFIMS Account #				
Agency/Invoice To: WVDOT Information Technology Division ATTN: Procurement Section 1900 Kanawha Blvd. E. Building 5, Room 720 Charleston, WV 25305		TEAM Code		
Ship To: WVDOT Information Technology Division ATTN: Procurement Section 1900 Kanawha Blvd. E. Building 5, Room 720 Charleston, WV 25305		TEAM Code		
Vendor Name & Address: DATABANK IMX LLC 458 PIKE RD HUNTINGTON VALLEY PA 19006				
WVFIMS Vendor # 000000161706		Team Vendor #		
BPO #	Terms	F.O.B.		

Item No.	Quantity	Description	Unit Price	Amount
		<u>CDO DOT23*32 - CMA DOT23*3</u> Statewide or Agency Blanket Purchase Order Number		
001	229	Business Consultant - Professional Services	\$210.00	\$48,090.00
002	1141	Database Engineer - Professional Services	\$210.00	\$239,610.00
003	223	Program Manager - Professional Services	\$210.00	\$ 46,830.00
		CHANGE ORDER 2 - EXTEND CONTRACT WITH INCREASE TO LINE ITEM 2		

Authorized Signature *Humera B Elkramh*
 Title CTO
 Telephone 304 - 414- 6911

Total Amount \$334,530.00

Original: Vendor
Copy: Purchasing Division

Project Delivery Order.

Company Name	West Virginia Department of Transportation
Project Name	E-Permitting Portal
Delivery Order ID	1c
Date	05/15/24

Type and Priority of Requested Change

Type Of Change Requested (Check all that apply)		Priority (Check ONE)
<input checked="" type="checkbox"/>	Scope Change	<input checked="" type="checkbox"/> Critical
<input checked="" type="checkbox"/>	Schedule Change	<input checked="" type="checkbox"/> High
<input checked="" 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 checked="" type="checkbox"/>	Design Change	

Details of Requested Change

Reason For Additional Order:

Solution Configuration has been completed. During unit testing, some design changes were requested to support some streamlining of business processes. In addition to some of the noted changes below, the implementation of these changes has caused an increase in budget and timeline.

- Permit Denials will be a standardized email and not a formal doc comp template
- Document naming coming from portal
- Invoice generation logic and data points
- Sub Category names for BP permit types
- Logic for Fee Types for Aerial and Subsurface Installations
- Unity Form Layout, Field Names, and Logic (Show/Hide, Default Values)
- Allow Applicant to Submit Address Changes for Day Forward Permits
- Allow unity form submission from OnBase in addition to Web Portal (for internal staff to submit on behalf of applicant)
- Set default values in workView based on permit type
- Remove / rename Oil & Gas Subcategories (Gas & Water)
- Additional data collection points in unity form and workview
- New doc type and logic for traffic impact studies
- Updates to Approval Matrix

- Separate MM109 application doc comp template into 2 doc templates (application and issued permit). Business process change to only have the applicant sign the application document and only have internal approval signatures on issued permit.
- Add separate queue/step into process for getting applicant signatures on unsigned forms
- Add ability to cancel an invoice and deny the permit if invoice has been unpaid for more than 90 days.
- Add ability to allow some permits to go to approval queue before invoice is paid.
- Additional training and training materials development

Functional Impact of Change:

Leveraging DataBank resold products and scripts to create new OnBase functionality.

Technical Impact of Change:

Added OnBase functionality in the EPermits solution, including Forms, Document Templates, Workflow and Workview.

Project Estimate:

Contract# CDO DOT2300000032

PO change is required to support the scope change and timeline change. An additional 250 hours (\$52,500) for Database Engineer – Professional Services will be added to the budget and the timeline will be extended until 8/1/24.

Delivery Order Approval

Hussein S Elkhamra
 <Client Contact>

5/23/2024
 Approval Date

Renee Jackson
 DataBank Project Manager

05/23/24
 Approval Date

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

v2.5.23.22

**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

v2.5.23.22

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

v2.5.23/22

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 Waltier
DataBank IMX

Vendor Signature

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.

DATABANK IMX LLC

See ATTACHED

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 Services - Professional, Scientific and Technical Services - Other Professional/Scientific/Technical Services (marketing research, public opinion polling, photographic, translation & interpretation, veterinary services)		
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
2024
2023
Date filed

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

Tuesday, June 11, 2024 — 1:01 PM

© 2024 State of West Virginia

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

Active From : 07/08/2022

Active To : 10/18/2022

Address Type : Ordering

Default Record :

Mail Returned :

Division/Department :

Active Address : No

Additional Address Info. :

Prevent New Spending :

Default Currency : USD - US Dollar

▼ Address Information

Address ID : AD000001 Country Phone Code : 1
 Street 1 : 458 PIKE RD Phone : 800-873-9426
 Street 2 : Phone Extension :
 City : HUNTINGTON VALLEY County :
 State/Province : PA County Name :
 Zip/Postal Code : 19006-1610 Country : US
 DUNS :
 Extended DUNS :
 Unique Entity Identifier :
 CAGE Code :

▶ 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. Sign In

Select Domain
Entity Information +

All Entity Information

Entities

Disaster Response Registry

Responsibility / Qualification

Exclusions

Filter By —

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

e.g. 123456789, Smith Corp

"Databank IMX LLC" ×

Entity ^

Entity Name

Databank IMX LLC × ▲

No results found ▲

e.g. HTYR9YJHK65L ▼

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?

Search inactive

Go back

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>J. ESTEP</u> Date: <u>6/11/24</u>	Agency: WVDOT
Solicitation No. <u>CDO DOT23*32</u> <u>CO# 2</u>	Procurement Officer Submitting Requisition: Amber Heath
	Requisition No. CDO DOT23*32 CO#2
	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				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<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"/>

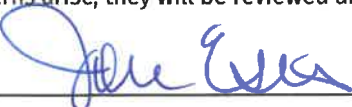
FOR CHANGE ORDERS/RENEWALS:

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"/>

**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.

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.