

A Guide for wvOASIS Document Submission: Header Documents

Solicitation Request (i.e. CRQS/CRQM):

The Header needs to contain all documentation relevant to the approval and ultimate advertisement of the solicitation.

This documentation includes:

1. Purchasing Master Terms and Conditions - **(current and editable version)**
2. Specifications in Word format using appropriate templates
3. Applicable exhibits, such as pricing pages and/or project manuals for construction projects
4. Suggested vendors listed in the Vendor List or Free Form Vendor fields
5. Any applicable approvals, such as approval from the Attorney General's Office, Chief Technology Officer/IS&C, Capitol Building Commission, Surplus Property, and/or the Statewide Interoperability Executive Committee

Change Order:

The Header needs to contain all documentation relevant to the action of the change order. All documents should be added as a single file to the Header and labeled as **Change Order "XX."**

This documentation includes:

1. Renewal – signed letter from vendor agreeing to the renewal
2. Extension – signed letter from the vendor noting the dates of extension and reason
3. Notice to Proceed – signed letter and documentation from the agency establishing the start and end dates for the contract
4. Increase – signed letter from vendor regarding need for increase, effective date of change, invoices, spreadsheets, etc. to support the change
5. Decrease – signed letter from vendor stating all invoices have been paid and breakdown of costs to show original contract, effective date for change and any price changes to the contract

Addendum:

State agency procurement officers should be advised of the following related to documentation submission for addenda:

1. Any relevant information/documentation to the addendum should be submitted in an email to the assigned Purchasing Division buyer via a Word document, when possible. This allows the Purchasing Division to revise the responses or add additional information.
2. Any exhibits, drawings, revisions or any other documentation relevant to the addendum should be submitted to the assigned Purchasing Division buyer by email.

Central Delivery Order (CDO):

The Header needs to contain all documentation relevant to the action of the Central Delivery Order (CDO).

Examples include:

1. Motor Vehicle (MV or MVTRUCK) Statewide Contract
 - a. Completed and signed copies of the Fleet Management Vehicle Request Form
 - b. Pricing pages from the Central Master Agreement (CMA) showing the contract price of the vehicle
2. WVARF Janitorial (WVRFJAN) Statewide Contract
 - a. WVARF Service Agreement containing dates of service, location, and pricing executed by WVARF and the agency
 - b. Commodity or Service Fair Market Price Form
 - c. Any applicable exhibits
3. Security Guard Services (SECSVS) Statewide Contract
 - a. Security Guard Request Form – completed in its entirety

Other Helpful Information:

Below are some additional tips that state agency procurement officers may find helpful when processing documentation within wvOASIS:

1. Make sure the correct statewide contract is referenced on the Reference Tab.
2. Make sure the dates of service are correct on the commodity line(s).
3. Any documents from the vendor to be added to the Header, such as quotes, invoices or agreements, must include the vendor's signature.
4. Pricing page(s) from the original contract should be included to verify pricing from the master contract. Pricing pages will not need to be provided if commodity lines were

used from the master contract. The Auditor's Office will need this pricing information to verify and pay per the awarded contract.

5. Effective 10/31/2018, state agencies seeking any loan or extension of credit from a bank or other financial institution must provide notice to, and receive approval from, the Governor's Office.

Additionally, below are some examples of language that may be included in extended descriptions:

1. MV Example:

Equipment Contract Release Order
SWC #MV16E
Class 11 Large Pick Up Regular Cab
Dodge Ram 2500 DJ7L62
Color: Silver
Fuel: Gas

2. WVARFJAN Example:

State Contract Release Order
SWC: WVRFJAN14

To provide janitorial services for the West Virginia Department Administration, General Services Division, Bldg. #1, per the attached documentation.

Dates of Service: 07/01/2017 through 06/30/2018

3. Security Guard Example:

Security Guard III: 1
Hours per Day: 10
Days per week: 5 (excluding state holidays)
Shift Hours: 7:00 AM - 5:00 PM
Paid half-hour lunch

Dates of Service: 10/6/2018 through 10/5/2019

Job Location: BUILDING 55
130 Stratton Street Logan, WV 25601