

West Virginia Purchasing Division

West Virginia Purchasing Division
2019 Washington Street, East
Charleston, WV 25305
WVPurchasing.gov
(304) 558-2306

A Message to All Designated Procurement Officers:

You are receiving this email because you serve as a procurement contact for your agency, as designated by your agency head. In this role, you play a critical part in obtaining the goods and services needed to help your agency perform its mission. If you are new to West Virginia state procurement, I am pleased to welcome you. If you are not new to the public procurement field, I hope you still find value in the information provided as part of this packet.

The goal of this packet was to compile and make available in one location resources, tools, and other procurement information designed to assist agency procurement officers in completing their day-to-day jobs. This packet includes quick reference links (we encourage you to bookmark these in your browser), a procurement guide that highlights the steps required once an agency identifies a need, a list of acronyms and terms used in the state purchasing process, information on our state procurement training program, and other valuable information.

In addition to these materials, the Purchasing Division strives to provide the best customer service possible. We recognize that there is a learning curve involved in understanding the laws, rules, and procedures that govern West Virginia state purchasing. Should you have any questions about the process, we encourage you to request a meeting with your agency's assigned Purchasing Division buyer. Schedule weekly check-ins. Work with them to plan ahead and create a timeline for your solicitations. Let them know when an upcoming solicitation will require special attention. After all, planning is key. Together, we can make this a process that works for all.

Please let us know if there is anything we can do to make your time in state purchasing a little smoother or visit WVPurchasing.gov for more information.

Sincerely,

A handwritten signature in black ink, appearing to read "W. Michael Sheets", followed by a long horizontal flourish.

W. Michael Sheets, CPP0
Director
West Virginia Purchasing Division

FREQUENTLY USED LINKS

State of West Virginia Purchasing Resource

Getting Started

DESCRIPTION	LINK
Contracts	
<i>Statewide Contracts</i>	www.state.wv.us/admin/purchase/swc
<i>Terms Agreements</i>	www.state.wv.us/admin/purchase/termsagreements.html
Debarment	
<i>Federal</i>	https://sam.gov/content/home
<i>State</i>	www.state.wv.us/admin/purchase/debar.html
Forms <ul style="list-style-type: none">- Includes:<ul style="list-style-type: none">- Agency Checklists- Pre-Bid Conference Sign-In Sheet- RFP Packet- Standard Format Templates	www.state.wv.us/admin/purchase/forms.html
Legislative Rule	www.state.wv.us/admin/purchase/rules.html
Master Terms and Conditions	
<i>Agency</i>	www.state.wv.us/admin/purchase/TCA.pdf
<i>Central</i>	www.state.wv.us/admin/purchase/TCP.pdf
Procedures Handbook	www.state.wv.us/admin/purchase/Handbook
Secretary of State Business Organization Search	http://apps.sos.wv.gov/business/corporations
Specification Index	www.state.wv.us/admin/purchase/specs

Surplus Property Operations Manual	www.state.wv.us/admin/purchase/surplus/surplus_operations_manual.pdf
Training Program Information	www.state.wv.us/admin/purchase/training
UNSPSC Commodity Codes	https://www.unspsc.org/search-code
West Virginia Code § 5A-3	https://code.wvlegislature.gov/5A-3/
wvOASIS	http://wvoasis.gov/

Other Helpful Links

Annual Report	www.state.wv.us/admin/purchase/Annualreport
Awarded Contracts and Change Orders	www.state.wv.us/admin/purchase/Awards/awarded.html
Bids Received	www.state.wv.us/admin/purchase/Bids
Buyer-Agency Assignments	www.state.wv.us/admin/purchase/byrassign.pdf
Buyers Network, The	www.state.wv.us/admin/purchase/BN/bnlist.html
Emergency Purchase Request Approvals	www.state.wv.us/admin/purchase/emergencyrequests.html
Inspections Report Index	www.state.wv.us/admin/purchase/Inspection/inspectReports.html
Notices to Agency Procurement Officers (archived)	http://intranet.state.wv.us/admin/purchase/eArchive.html <i>*Available on state network only</i>
Procurement Officer Listing	www.state.wv.us/admin/purchase/vrc/agencyli.html
Purchasing Division Directory	www.state.wv.us/admin/purchase/directory.html
Vendor Procurement Guide	www.state.wv.us/admin/purchase/vrc/VPG

Step-by-Step Procurement Guide

Revised 7/1/2022



West Virginia Department of Administration

Purchasing Division

2019 Washington Street, East
Charleston, WV 25305-0130

Telephone: (304) 558-2306

In-State Toll-Free: 800-BIDS2WV (800-243-7298)

Fax: (304) 558-4115

WVPurchasing.gov

Purchasing.Help@wv.gov

1 REQUEST RECEIVED BY AGENCY PROCUREMENT OFFICER FOR GOOD OR SERVICE

- 1a. Check mandatory contracts and set aside programs
- 1b. Research and understand the need

2 DETERMINE PROCUREMENT METHOD, TYPE, AND SPENDING THRESHOLD

- 2a. Determine if one-time or recurring need
- 2b. Determine the most suitable procurement method for the purchase
- 2c. Determine if central v. delegated purchase

3 DEVELOP PROCUREMENT DOCUMENTS

Documents vary based on procurement method and threshold but may include preparing specifications, documenting file, or preparing purchase order. See outline for more details.

4 ADVERTISE SOLICITATION, EVALUATE BIDS, AND/OR AWARD CONTRACT

Steps to advertise or otherwise publish documentation vary based on the procurement method used but may include advertisement of the solicitation or intent to award. In some cases, such as emergencies, the agency may proceed with preparing the documentation and completing the work. See outline for more details.

5 COMPLETE POST AWARD REQUIREMENTS

- 5a. Consider vendor protests
- 5b. Conduct contract management procedures
- 5c. Make purchasing documents available to Purchasing Division inspectors upon request

1. Agency procurement officer receives request from agency employee for good or service.

1a. Check availability on mandatory contracts or through set aside programs. Statewide contracts. Open-end contracts. Correctional Industries. Sheltered workshops. If available, proceed with the purchase.

1b. Research and understand the need. Determine quantity, availability, vendors in market, potential competing goods/services, price range, agency's historic utilization and spend, etc. Talk to agency end users, conduct research on the current market, search the internet, talk to multiple vendors, issue an RFI, and/or review past purchases of the same or similar good/service.

2. Determine procurement method, type, and spend threshold.

2a. Determine procurement type. This includes one-time purchases and recurring need.

2b. Determine procurement method needed. This includes RFQs, RFPs, EOIs, direct awards, emergency purchases, Section 9, and others.

2c. Determine the spending threshold. The agency considers aggregate spend to determine if the procurement will fall under agency-delegated or central purchasing procedures.

3. Develop procurement documents, if required based on spending threshold.

3a. Delegated purchases \$50,000* or less.

3a.1. If *RFQ* or *EOI* procurement method is used, the agency develops specifications and prepares the solicitation.

3a.2. If the *direct award* method is used, the agency completes the Direct Award for Consideration (WV-65A) form for solicitations between \$5,000 and \$50,000*.

3a.3. If an *emergency purchase* is required, the agency properly documents the agency file and proceeds with the purchase.

3a.4. If the purchase falls under *Section 9: Impossible to Bid List*, the agency develops the contract documents, properly documents the file, and proceeds with the purchase.

3a.5. *RFPs* are not permitted at this level of purchase.

Note: Soliciting goods or services between \$0-\$5,000 require no bids or documentation. Three verbal bids and a purchase order are required for purchases of \$5,000.01 to \$20,000. Specifications and public advertisement in *wvOASIS* are required for purchases of \$20,000.01 to \$50,000*.

**or \$100,000 if additional delegated authority granted*

Note: Direct awards in the amount of \$0-\$5,000 require no advertising or documentation.

3b. Central purchases exceeding \$50,000*.

3b.1. If *RFQ*, *RFP*, or *EOI* procurement method is used, agency develops the specifications, prepares the requisition, and submits it to the Purchasing Division.

3b.2. If the *direct award* method is used, the agency completes the Direct Award for Consideration (WV-65) form and submits it and any supporting documentation to the Purchasing Division.

3b.3. If an *emergency purchase* is required, the agency seeks approval for the purchase from the purchasing director. If the emergency occurs outside of normal business hours, the agency attempts to obtain three bids, proceeds with the work, and follows up with the Purchasing Division on the next business day with justification and all documentation.

3b.4. If the purchase falls under *Section 9: Impossible to Bid List*, the agency develops the contract documents, properly documents the file, and proceeds with the purchase.

4. Advertise solicitation, evaluate bids, and/or award contract.

4a. Delegated purchases \$50,000 or less.

4a.1. If the *RFQ* procurement method is used for purchases between \$20,000.01 to \$50,000*, the agency prepares the solicitation and advertises it in *wvOASIS*, evaluates the bids received, and awards the purchase order/contract.

4a.2. If the *EOI* procurement method is used, the agency advertises the solicitation in *wvOASIS*, evaluates and scores the proposals received, and conducts final negotiation of the contract. The Purchasing Division awards the contract.

4a.3. If the *direct award* method is used and the purchase will be between \$0 and \$5,000, no advertisement or documentation is required. The agency may proceed with the direct award. If the direct award purchase will fall between \$5,000.01 and \$20,000, the agency publishes the Direct Award for Consideration (WV-65A) form in *wvOASIS* for public notice. If a vendor expresses valid interest in providing the good/service, the solicitation will be competitively bid. If no vendor expresses interest, the agency proceeds with awarding the purchase order/contract.

4a.4. *Emergency purchases* at this level do not require public

**or \$100,000 if additional delegated authority granted*

advertisement, but the agency should attempt to obtain three bids and award to the lowest responsive vendor.

4a.5. If the purchase falls under *Section 9: Impossible to Bid List*, no advertisement is required. The agency develops the contract documents, properly documents the file, and proceeds with the purchase.

4a.6. *RFPs* are not permitted at this level of purchase.

Note: Soliciting goods between \$0-\$5,000 require no bids or documentation. Three verbal bids and a purchase order are required for purchases of \$5,000.01 to \$20,000. Specifications and public advertisement in wvOASIS are required for purchases of \$20,000.01 to \$50,000*. Some exceptions apply. See Section 5 of the Purchasing Division Procedures Handbook for more information.

4b. Central purchases exceeding \$50,000*.

4b.1. If *RFQ* or *RFP* procurement method is used, the Purchasing Division advertises the solicitation, the agency evaluates the bids and/or scores the proposals, and the Purchasing Division awards the purchase order/contract.

4b.2. If the *EOI* procurement method is used, the Purchasing Division advertises the solicitation in wvOASIS, and the agency evaluates and scores the proposals received and conducts final negotiation of the contract. The Purchasing Division awards the contract.

4b.3. If the *direct award* method is used, the Purchasing Division advertises the Direct Award for Consideration (WV-65) completed by the agency for public notice. If a vendor expresses valid interest in providing the good/service, the solicitation will be competitively bid. If no vendor expresses interest, the Purchasing Division proceeds with awarding the purchase order/contract.

4b.4. *Emergency purchases* at this level do not require public advertisement but the agency must seek approval of the purchasing director. If the emergency occurs outside of normal business hours, the agency attempts to obtain three bids, proceeds with the work, and follows up with the Purchasing Division on the next business day with justification and all documentation.

5. Complete post award requirements. Consider vendor protests, conduct contract management procedures, and make purchasing documents available upon request. Vendor protests have not been delegated to the agency. Forward any protests received to the Purchasing Division.

**or \$100,000 if additional delegated authority granted*

Step-by-Step Procurement Flow Chart

***Or \$100,000 if additional delegated authority is granted**

Step 1: Agency procurement officer receives request to purchase good or service

Step 1a. Determine if good or service is available from a mandatory source. Mandatory sources include statewide contracts, agency open-end contracts, Correctional Industries, and Sheltered Workshops. *Section 3 of Procedures Handbook*

If yes, obtain good or service from the mandatory contract

Step 1b. If the good or service is not available from a mandatory source, conduct research to better understand the request/need/market. *Section 3 of Procedures Handbook*

Step 2: Determine the procurement method and aggregate spend for the same or similar good or service in previous 12 months. *Sections 5 and 6 of Procedures Handbook*

\$5,000 or less

\$5,000.01 to \$20,000.00

\$20,000.01 to \$50,000.00*

\$50,000.01* and more

No bidding required. Proceed with purchase of commodity or service. Does not apply to A/E services

Verbal bid rules apply

Step 3: Develop procurement documents for procurement method and spend threshold. *Sections 3, 5, and 6 of Procedures Handbook*

Step 4: Advertise solicitation, evaluate responses, and/or award contract. *Sections 5 and 6 of Procedures Handbook*

Step 5: Complete post award requirements. These may include protests, contract management procedures, and making files and documentation available for inspection. *Sections 7 and 9 of Procedures Handbook*

West Virginia Purchasing Division

Training Program



Online Training Modules

On-Demand Training Modules

www.state.wv.us/admin/purchase/training/modules.html

Full Modules / .5 Hours

Agency Delegated Purchasing*

Basic Purchasing*

Change Orders and Addenda

Drafting Specifications for RFQs*

Evaluation and Award Process*

Fixed Assets and Surplus Property

Requests for Proposals (RFP) Evaluation*

Requests for Quotations*

Special Purchasing Processes*

Vendor Remedies: Protests, Circuit Court, and Claims Commission

Mini Modules / .25 Hours

Blackout Period*

Compliance Verification Checklist for Requisition Submission*

Construction Purchases*

Pre-Bid Conferences

Prohibited Contract Clauses Law

Standardization Process

Stringing*

Vendor Registration Fee Exemption

**Modules indicated with an asterisk (*) are encouraged for agency procurement officers who are new to the state purchasing process. These modules, when viewed collectively, provide an overview of the purchasing process, as well as the agency and Purchasing Division's roles in that process.*

See attached Schedule

www.state.wv.us/admin/purchase/training/inhouse.html

In-Person/Webinar

The Purchasing Division offers monthly webinars and in-person training sessions to state employees who procure for agencies governed by W. Va. Code § 5A-3. These sessions are free of charge.

Conference

Agency Purchasing Conference

www.state.wv.us/admin/purchase/Conference/Agency/2023

The Agency Purchasing Conference is conducted annually for the state's agency procurement officers to inform them of the laws and rules governing the process. With 20+ topics each year, this conference is the perfect opportunity for those individuals new to state procurement, and serves as a great refresher for those more tenured staff.

Beginner's Track

The Purchasing Division offers a series of beginner courses for those individuals new to the state purchasing process or those who need a refresher on the laws and rules. In addition to the online training modules indicated with an asterisk (*) in the Online Training Modules section of this guide, the Purchasing Division also offers a Beginner's Track at its annual Agency Purchasing Conference, as well as two day-long sessions for beginners each year, titled "An Introduction to West Virginia State Purchasing."

State Procurement Certification Program

Certification Program

www.state.wv.us/admin/purchase/training/Certification

The Purchasing Division administers the State Procurement Certification Program, which provides development and recognition to procurement officers who demonstrate a level of knowledge and excellence in the purchasing process. There are two levels of certification, Basic and Advanced.

Individualized Agency Training

The Purchasing Division develops and performs individualized training plans at the request of an agency to target identified areas of weakness.

2023 Second Semester Training Schedule

West Virginia Purchasing Division

2023 Dates	Workshop Title	In-Person	Webinar	Time	Method
July 12	Fixed Assets and Surplus Property	PUR110	PUR110W	10 am – 11 am	Hybrid
July 26	Electronic Business with WV	N/A	PUR105W	10 am – 11:30 am	Webinar
August 16	wvOASIS Tips and Tricks	PUR120	PUR120W	10 am – 11 am	Hybrid
August 30	Purchasing: A Privacy Powerhouse	N/A	PUR201W	10 am – 11:30 am	Webinar
September 13	Contracting Basics/Tools and Resources	PUR405	PUR405W	9 am – 11 am	Hybrid
November 29	Boards and Commissions	PUR306	PUR306W	9 am – 11 am	Hybrid
December 13	RFQ's from A to Z; Statewide Contracts; Market Research	PUR406	PUR406W	9 am- 12 pm	Hybrid

**All sessions are worth one credit per one hour of training for the 10-hour training requirement for designated procurement officers, per § 148 C.S.R. 1-3.2*

List of wvOASIS and Purchasing Acronyms and Terminology

SOLICITATIONS		
<i>ACRONYM/CODE</i>	<i>TERM</i>	<i>DESCRIPTION</i>
	Addenda	This is the process used to facilitate a change to a solicitation after it has been publicly advertised in the West Virginia Purchasing Bulletin. The addendum is generated by the agency to address the change and is issued to prospective bidders by the Purchasing Division.
ASSD/CSSD	Agency/Centralized Sole Source Determination (i.e. Direct Award)	The ASSD/CSSD is the document used by an agency to publish its intent to make a direct award.
	Bid Closing	This is the date after which responses are no longer accepted for a solicitation.
	Bid Opening	This is the date on which responses are opened for a solicitation.
	Copy Forward	This feature enables a user to copy pertinent information from a finalized existing document into a new document for the purpose of referencing or closing out the source document.
	Document Header	The Document Header contains the summary portion of the document applying to all lines of the document.
EOI	Expression of Interest	This is a solicitation method used to solicit expressions of interest from qualified firms primarily in the selection of architectural and engineering services.
	Let Date	The Let Date is the date on which the solicitation is published.
	Published Date and Time	The published date and time are the date and time that the solicitation or amendment was successfully published to the Vendor Self Service.
RFI	Request for Information	This is a solicitation document used to solicit information to assist in preparing specifications for a Request for Quotation or Request for Proposal. No award can be made from an RFI.
RFP	Request for Proposals	This is a best value procurement tool used to acquire professional and other services where the scope of work may not be well defined, and cost is not the sole factor in determining the award. All criteria by which the bidders will be evaluated must be contained within the bid document.
RFQ	Request for Quotation	This is a document containing the specifications or scope of work and all contractual terms and conditions that is used to solicit written bids. Conformity to specifications and price are the only factors used in the evaluation process.
	Solicitation	This is the general term given to documents that are used to formally advertise goods and/or services and invite vendors to respond with bids or proposals.
	Solicitation Response/Bid	Document used to record vendor responses to a solicitation.
<i>ADDITIONAL TERMS/NOTES:</i>		

List of wvOASIS and Purchasing Acronyms and Terminology

EVALUATION AND AWARD

<i>ACRONYM/CODE</i>	<i>TERM</i>	<i>DESCRIPTION</i>
APO	Agency Purchase Order	This is an award document used to execute a purchasing transaction of *\$50,000 or less for defined goods and/or services and in which the transaction is complete upon the delivery of the goods and/or services.
ACT/CCT	Agency/Centralized Contract	ACT/CCT refers to award documents which are enforceable by law between two or more competent parties for a lawful purpose for consideration. They are used to acquire defined goods and/or services with a specified life of contract.
ADO/CDO	Agency/Centralized Delivery Order	ADO/CDOs are orders made for purchases from a master agreement (i.e. open-end contract).
CPO	Centralized Purchase Order	This is an award document used to execute a purchasing transaction of more than *\$50,000 for defined goods and/or services and in which the transaction is complete upon the delivery of the goods and/or services.
EV	Evaluation Document	This evaluation document allows an agency to review, evaluate, and rank all solicitation responses.
	Evaluation Criteria	Evaluation criteria include the specifications and/or requirements used to evaluate vendor responses to a solicitation.
AMA/CMA	Agency/Centralized Master Agreement (i.e. open-end contract)	A master agreement is an award document for defined goods and/or services which covers a period in which all terms, conditions, and prices are specified with the exception of quantity.
	Certificate of Insurance	Vendor insurance is a vital part of the procurement process. It ensures the vendor is responsible for its own acts of negligence or for a contract violation, rather than the state. A Certificate of Insurance is required prior award, or prior to any contract renewal, when applicable.
	Change Order	A change order is used when it becomes necessary to amend, clarify, change, or cancel purchasing documents issued by the Purchasing Division. A change order is required whenever the change affects the payment provision, time for completion of the work, and/or the scope of the work.

ADDITIONAL TERMS/NOTES:

List of wvOASIS and Purchasing Acronyms and Terminology

VENDOR RECORDS		
<i>CODE</i>	<i>TERM</i>	<i>DESCRIPTION</i>
TIN	Taxpayer ID Number	The number used by the Internal Revenue Service to identify taxpaying entities.
VCC	Vendor/Customer Creation Document	A document that allows an individual to add new records to the Vendor/Customer table. The VCC can be sent through workflow and approvals.
VCM	Vendor/Customer Modification Document	The document used to modify or add to an existing vendor/customer record. The VCM can be sent through workflow and approvals.
VCUST	Vendor/Customer Table	The wvOASIS table that contains the primary information about a vendor/customer. Records on this table contain information that is specific to the processing of disbursements for individual vendors and receivables for individual customers. This record also contains ordering and payment addresses for vendors.
VNREGEX	Vendor Registration Exemption	This table contains a list of vendor registration exemption codes. These codes are used <i>only</i> when a transaction is exempt from the Purchasing Division's vendor registration requirements.
VSS	Vendor Self Service	A web-based portal through which vendors themselves may apply to register their companies in wvOASIS.
VENDNOT	Vendor Notification	This table allows you to see all of the vendors who received an email by wvOASIS for a specific solicitation.
	Free Form Vendors	This field is used on a requisition to suggest possible vendors to bid on a solicitation.
<p><i>ADDITIONAL TERMS/NOTES:</i></p>		

List of wvOASIS and Purchasing Acronyms and Terminology

MISCELLANEOUS		
<i>CODE</i>	<i>TERM</i>	<i>DESCRIPTION</i>
	Auto Populate	This is a process in which data is populated in document fields after Copying Forward to create a document, or when a Save or Validate is performed on the document. This data is often inferred from referenced documents.
	Document Catalog	The Document Catalog serves as the central repository for all documents created in wvOASIS. Documents can be queried and processed by selected actions from this location.
DSCRDLOG	Document Discard Log	This search function allows you to see if a document has been discarded.
	Favorites	Favorites provides a way for users to save frequently visited pages. The user can make any page a Favorite by right-clicking on the page and selecting Add to Favorites from the mouse menu. Favorites are accessed via the Secondary Navigation Panel.
	Historical Version	This refers to past versions of a document after modifications and cancellations have been processed.
	Phase	A Phase is a point in time within the document processing lifecycle. Common phases include: Draft, Pending, and Final.
	Procurement Folder	The Procurement Folder serves as the single point for tracking and reporting during the life cycle of a procurement. It is used to track the requisition commodity line through the entire procurement process.
PRCUID	Procurement Management Table	This table allows a procurement officer to search for a Procurement Folder.
	Procurement State	The Procurement State organizes the events and actions which occur during a procurement, as well as manages the document components.
UR	Universal Requestor	This document enables the most basic user to create Requisition, Award, and Payment Request documents. The UR is used to simplify the purchasing process for infrequent users that might not be familiar with procurement rules and regulations.
URSRCHMA	Central Master Agreement Search Table	
	Wildcard	Wildcard is a character (*) that can be used to represent one or many characters when completing a search in wvOASIS.
	Workflow	Workflow refers to an online approval process.
	Worklist	A worklist is a list of documents that have been routed to a user for approval or for review after approval or rejection.

List of wvOASIS and Purchasing Acronyms and Terminology

ADDITIONAL TERMS/NOTES:

Specification Drafting Tips

- **Draft specifications for the appropriate procurement method**
 - Requests for proposals
 - Use minimal mandatory specifications (stay away from words like “will”, “shall”, “must”, “minimum”, and “maximum” to the greatest extent possible)
 - Use maximum desirable, scorable items (use words like “could”, “should”, and “preferred”)
 - Award to high score (sum of scores for technical and cost)
 - Requests for Quotations
 - Use mandatory specifications to set the standard of quality needed (use words like “will”, “shall”, “must”, “minimum”, and “maximum” to the greatest extent possible)
 - Award to lowest bid (based on cost only) meeting those standards
- **Clearly describe the desired commodity or service**
 - Include enough information to get a product/service that will accomplish the agency’s objective
 - Ensure that specifications do not favor a brand or vendor; if brand name is used, must say “or equal” unless a standard has been identified through the standardization process
 - If using a “brand name or equal” specification, establish a basis for equivalency comparison (this means including specifications separate from the “brand name or equal” specification that identify the functionality needed; what does it need to do?)
 - Use minimums, maximums, or ranges to allow for competition
 - Understand the industry/commodity/service and use appropriate industry terms
- **Ensure other critical contract terms are included and reasonable (cannot have a contract without them, and they establish vendor expectation and contractual obligation)**
 - Quantity – include either actual or estimated quantity
 - Time – include actual date or time frame for performance
 - Delivery – include delivery location and timing information (make sure delivery time is reasonable)
 - Legal – include any other requirements mandated by law (Example: HIPAA)
- **Ensure that your specifications have incorporated changes from prior solicitations**
 - If vendor questions or protests from previous solicitations or contracts caused changes to specifications, those changes should be incorporated into subsequent solicitations/bids for that commodity/service
- **Price evaluation**
 - Pricing calculations must match what is written in the specifications
 - *Example: Avoid specifications that call for award to “Grand Total” in the specifications and “Overall Total” on the pricing page*
 - All pricing must be included in the cost evaluation
 - *Example: Optional pricing or extra fees not included in the price evaluation are prohibited*
 - Pricing must allow for fair comparison
 - *Example: Evaluating on price per bottle when vendor bottle sizes may differ could lead to an unfair cost evaluation*
- **Eliminate “with the bid” requirements wherever possible**
 - Information can be obtained prior to award in most cases and “with the bid” can lead to unwanted disqualification
- **General drafting best practices**
 - Avoid ambiguity (words that have more than one meaning)
 - Be consistent (refer to the same thing the same way every time)
 - Avoid contradictory requirements (FOB Seller and FOB Buyer in same document)
 - Avoid spelling, grammar, and other errors (Example: “except” and “accept” are not the same)
- **Use the proper requisition type for the anticipated award type when submitting your solicitation**
 - CRQS for CPO or CCT
 - CRQM for CMA

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: _____ Date: _____ Solicitation No. _____	Agency: _____ Procurement Officer Submitting Requisition: _____ Requisition No. _____ PF No.: _____
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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				
	<i>Commercial General Liability</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>Automobile Liability</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>Workers' Compensation/Employer's Liability</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>Cyber Liability</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>Builder's Risk/Installation Floater</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>Professional Liability</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<i>Other (specify)</i>	<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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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:

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=b372dad1b4ac5d40ca4a97ae54bcbb2&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.

VENDOR NON-PERFORMANCE NOTIFICATION FORM

Rev. 4/5/2022

WV-82

PO No. _____

Procurement Folder No. _____

The purpose of this form is to formalize the notification from West Virginia state agencies to contract holders/vendors of contract-related and general performance issues and to memorialize any agreed to resolution.

PART I:

REPORTING DEPARTMENT/AGENCY INFORMATION

REPORTING DEPARTMENT/AGENCY NAME: _____

NAME OF CONTRACT ADMINISTRATOR/AGENCY CONTACT: _____

TELEPHONE NUMBER: _____ EMAIL ADDRESS: _____

VENDOR INFORMATION

VENDOR/BUSINESS NAME: _____

VENDOR CONTACT NAME: _____

VENDOR CUSTOMER CODE: _____

ADDRESS (STREET, CITY, STATE, ZIP CODE): _____

TELEPHONE NUMBER: _____ EMAIL ADDRESS: _____

COMPLAINT DESCRIPTION:

CONTRACT CLAUSE(S)/PROVISION(S) BREACHED:

VENDOR NON-PERFORMANCE RESOLUTION

Rev. 4/5/2022

WV-82

PO No. _____

Procurement Folder No. _____

PART 2:

VENDOR PROPOSED RESOLUTION:

VENDOR REPRESENTATIVE (Signature): _____ Date: _____

VENDOR REPRESENTATIVE NAME AND TITLE (Printed): _____

By signing below, the Agency agrees that it has determined that the proposed resolution is consistent with contractual requirements, does not require a change order, and is an acceptable way to resolve the identified complaint.

AGENCY REPRESENTATIVE (Signature): _____ Date: _____

AGENCY REPRESENTATIVE NAME AND TITLE (Printed): _____



Procurement Basics

Welcome Packet
2023

Objectives

1. wvOASIS Procurement Functionality
2. Review Encumbrances
3. Creating a Requisition
4. Document and Line References
5. Creating a Solicitation
6. Publishing a Solicitation to VSS
7. Monitoring the wvOASIS Cycle Dashboard

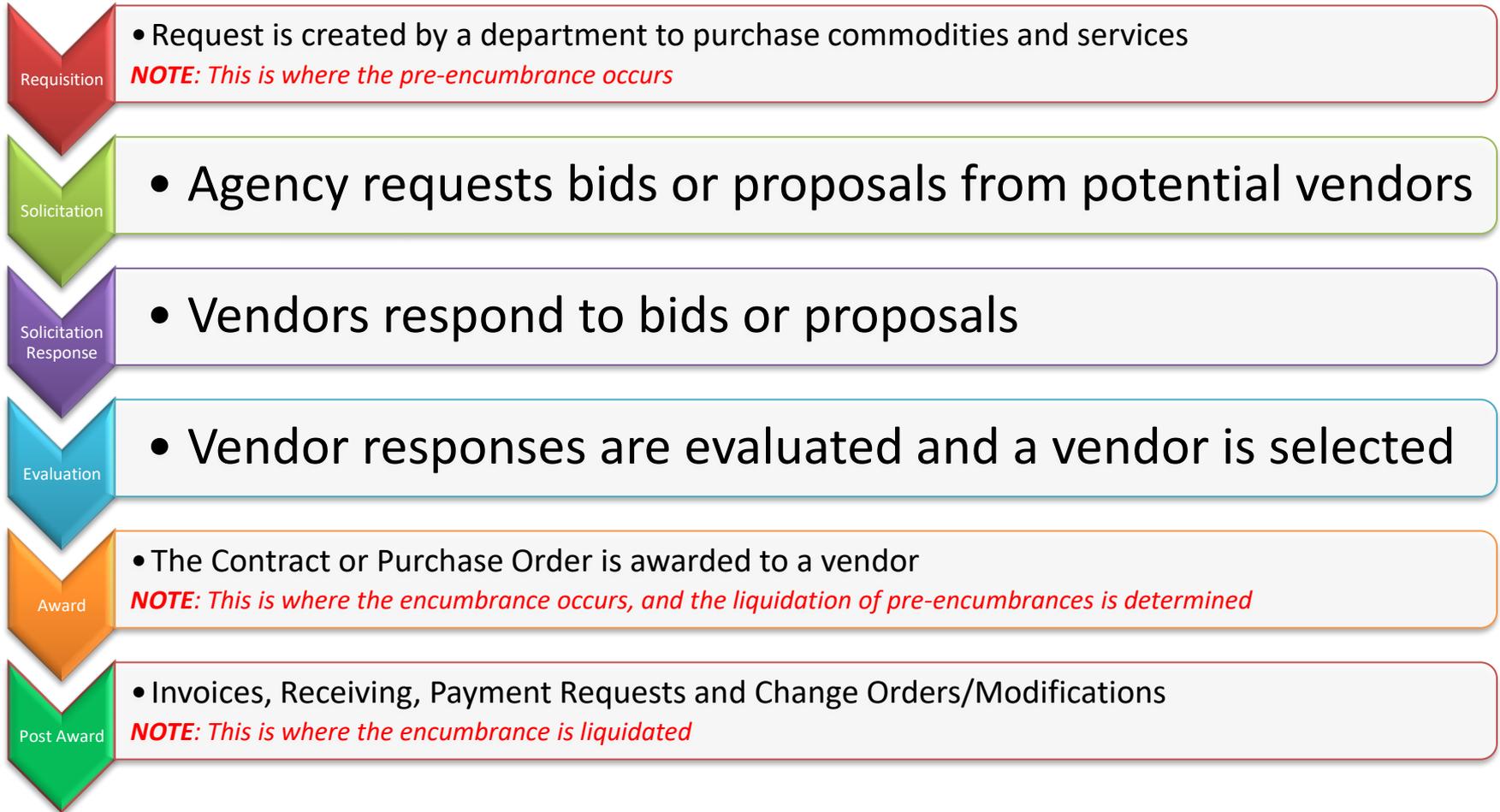
Objective 1

wvOASIS Procurement Functionality

Procurement Functions

- Requisitions, Solicitations, Evaluations and Awards
- Vendor Registration
- Vendor Self-Service
- Inventory Management
- Encumbrance
- Receiving

Procurement States



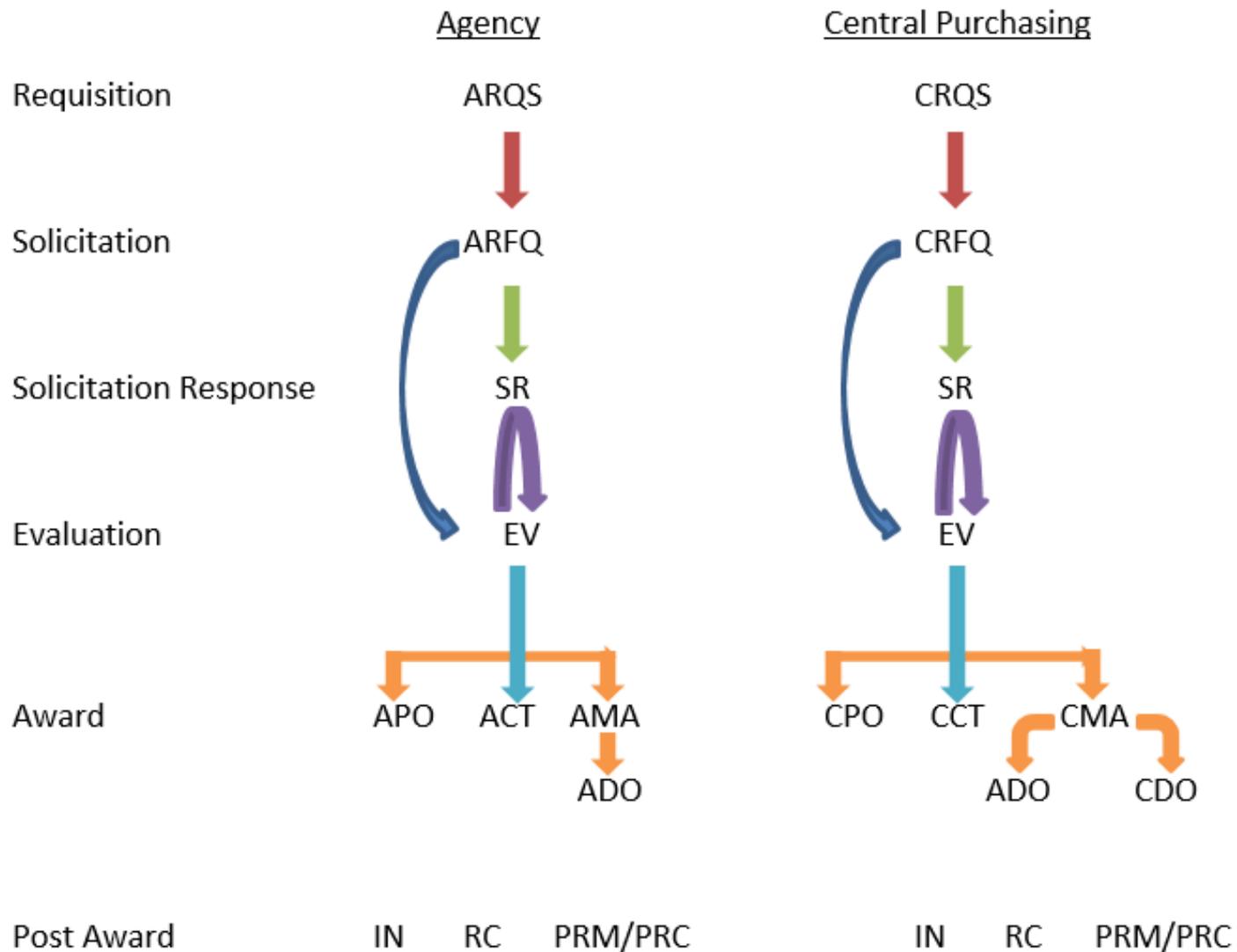
Agency vs Central

- To differentiate between centralized and decentralized transactions, wvOASIS has two versions of most procurement documents
- Central documents are identified by the prefix C (such as CRQS)
- Decentralized (agency) documents are identified by the prefix A (such as ARQS)
- Workflow is determined based on this designation

Procurement Documents

Procurement State	Centralized	Decentralized
Requisition	CRQS	ARQS
Solicitation	CRFQ	ARFQ
Solicitation Response	SR	SR
Evaluation	EV	EV
Award – Purchase Order	CPO	APO
Award – Contract	CCT	ACT
Award – Master Agreement	CMA	AMA
Award – Delivery Order	CDO	ADO

Copy Forward to Process Transactions



Objective 2

Encumbrances

Pre-Encumbrance vs Encumbrance

- To encumber funds means to set aside or reserve money for a specific purpose.
- There are two methods to encumber funds in wvOASIS:
 - Accounting-based documents (GAE, GAP)
 - Commodity-based documents: (*RQS,*PO, *CT, *DO)
- Note:
 - A pre-encumbrance may or may not reference a vendor
 - An encumbrance references a vendor

Encumber Now or Later?

- The Accounting Line ***Event Type*** determines when the funds will be encumbered.
 - Current Fiscal Year
 - Future Fiscal Year (Out-Year)

Document Type	Accounting (Current Year)	Non-Accounting (Out-Year)
RQ	PR02, PR05	PR01
PO	PR05	PR07

Crossing Fiscal Years

Accounting Line Fields	Current Fiscal Year Encumbered Now	Out-Year Encumbered After FY Roll
Event Type	PR05 (PO) or PR02 (RQ)	PR07 (PO) or PR01 (RQ)
Reserved Funding	No	Yes
Budget Fiscal Year	2023	2024, 2025, 2026...
Fiscal Year	2023	2023

Requisitions for Master Agreements

- Although the system requires accounting lines on all types of requisitions, the requisition designed for the Master Agreement (CRQM, ARQM) awards do not require detailed accounting.
 - There is no pre-encumbrance or encumbrance for master agreement requisitions or awards.
 - As a result, there is no downstream benefit to entering the **Fund Accounting** or **Detailed Accounting** tab information.
 - Leave the Fund Accounting and Detailed Accounting tabs blank
 - Enter only the following on the Accounting line General Information tab:
 - Event Type **PR01**
 - Reserved Funding **Yes**
 - Allow the **current** BFY to be inferred when validated

CRQM Accounting Line – General Information Tab

View All 1 of 1 Document validated successfully

Centralized Master Agreement Non-Actg(CRQM) Dept: 0947 ID: ERP1700000001 Ver.: 1 Function: New Phase: Draft Modified by miller , 08/02/2016

Accounting Accounting Line: 1 Line Amount: \$10,000.00 Line Open Amount: \$10,000.00

Accounting Line	Line Amount	Line Open Amount	Line Closed Amount	Referenced Line Amount	Event Type	Non-Reserved Funding Open Amount	Reserved Funding
1	\$10,000.00	\$10,000.00	\$0.00	\$0.00	PR01	0.00	Yes

From 1 to 1 Total: 1

General Information Fund Accounting Detail Accounting

Event Type: PR01

Posting Pair: A

Accounting Template:

Line Description: PR01 non-accounting event type does not encumber funds. Current BFY will be inferred.

Line Amount: \$10,000.00

Reserved Funding: Yes

Roll Indication 1:

Roll Indication 2:

Budget FY:

Fiscal Year:

Period:

Non-Reserved Funding Open Amount: 0.00

Line Closed Amount: \$0.00

Line Closed Date:

Line Open Amount: \$10,000.00

Referenced Line Amount: \$0.00



List View

CRQM Accounting Line – Fund Accounting Tab

View All 1 of 1 Document validated successfully

Centralized Master Agreement Non-Actg(CRQM) Dept: 0947 ID: ERP1700000001 Ver: 1 Function: New Phase: Draft

Modified by millerd , 08/02/2016

Accounting									
Accounting Line: 1 Line Amount: \$10,000.00 Line Open Amount: \$10,000.00									
Accounting Line	Line Amount	Line Open Amount	Line Closed Amount	Referenced Line Amount	Event Type	Non-Reserved Funding Open Amount	Reserved Funding		
1	\$10,000.00	\$10,000.00	\$0.00	\$0.00	PR01	0.00	Yes		
From 1 to 1 Total: 1						First	Previous	Next	Last

List View

General Information **Fund Accounting** Detail Accounting

Fund:	<input type="text"/>		Object:	<input type="text"/>		OBSA:	<input type="text"/>	
Sub Fund:	<input type="text"/>		Sub Object:	<input type="text"/>		Sub OBSA:	<input type="text"/>	
Department:	<input type="text"/>		Revenue:	<input type="text"/>		Dept Object:	<input type="text"/>	
Unit:	<input type="text"/>		Sub Revenue:	<input type="text"/>		Dept Revenue:	<input type="text"/>	
Sub Unit:	<input type="text"/>		BSA:	<input type="text"/>				
Appr Unit:	<input type="text"/>		Sub BSA:	<input type="text"/>				

Again, leave the Fund Accounting and Detailed Accounting tabs blank

Maximum Budgeted Amount

- The **Maximum Budgeted Amount** field does not pre-encumber or reserve funds
 - It is only used to determine whether negotiations are allowed (when all bids exceed available funds)

Maximum Budgeted Amount: \$30,000.00

Objective 3

Creating a Requisition

Creating a Requisition

- Determine if the desired purchase requires central approval, or qualifies as agency delegated.
- Will the award document be a Purchase Order, Contract or Master Agreement?
- Is there a 3rd party approval required, such as Attorney General, Fleet, Treasurer or Office of Technology?

Reporting Fields

- Requisition and award documents have seven reporting fields at the header level
 - Reporting Field 1 is used to record the ***solicitation type*** and is a required field
 - Reporting Field 2 is used for third-party approvals
 - Reporting Field 4 may be used by agencies at their discretion
- Remaining fields will be assigned by wvOASIS in the future

Third Party Approvals

- Instructions for Third Party Approvals are available on *myApps / Enterprise Readiness / Outreach Sessions / Procurement / Updates*
- Examples of Third Party Approvals include:
 - Fleet Management for vehicles
 - Office of Technology for computer related orders
 - State Treasurer's Office for banking services
 - Attorney General for legal services

myApps Resources

myApps > myOASIS

myApps Enterprise Readiness

Outreach Sessions

Outreach Sessions

Please choose a Section and Sub-Section from the dropdowns below.

Procurement



Updates



	Description	Event Name	Event Date
	Accounting Adjustments to Central Procurement Documents	Procedure Guide	03/01/2016
	Commodity Codes	PowerPoint	09/28/2016
	Third Party Approvals	Procedures Guide	07/01/2014
	e-Catalog Spreadsheet	Template	03/01/2016

Creating a Requisition

- From the Jump To field or Document Catalog menu, enter the document code:
 - ARQM, CRQM is to be used for Master Agreement type awards
 - ARQS, CRQS is to be used for Purchase Order and Contract award types

Entering the Document Information

- Header section
 - General Information tab
 - Document Name
 - Document Description
 - Procurement Type ID
 - Maximum Budgeted Amount (optional)
 - Requestor Issuer Buyer tab
 - Issuer ID defaults to user creating the document
 - Requestor ID
 - Buyer ID (Agency buyer if not a Central document)

Entering the Document Information

- Default Shipping/Billing tab
 - Add Agency Shipping Location
 - Add Agency Billing Location
- Reporting tab
 - Reporting 1
 - Reporting 2 (if Third Party Approval is required)

Line Reference Types

- The selection of a reference type at the commodity and accounting line levels determine the action taken against the referenced document line.
- The default value for the reference type field varies between different document types and on some document types it is even protected.
- Certain document types give three choices and others give all four choices.

Reference Type Choices

The Reference Type can have **one** of the following four options:

- 1. Memo** – When all that is required is a link between the referencing and referenced documents for reporting and research purposes, the memo type is used. It does not perform any common liquidation of the referenced document.
- 2. Partial** – When a referencing document should close only a part of the referenced document, then the partial type is used. This is the default reference type for most situations.
- 3. Final** – When a referencing document should close out the remainder of a referenced document, then the final type is used. Common logic determines this reference type in the situation where the referencing line amount is equal to or greater than the referenced.
- 4. Inverse** – When a referencing document should re-open a portion of the referenced document, the inverse reference type is used. This reference type is not available on all documents.

When, When Not

- Line references are needed when the lines on a previous document in the chain need to be fully liquidated or only partially liquidated.
- However, line references are not needed when there is no applicable line on which to take action. An example would be when a new commodity line is added to a purchase order by copying an existing line. The line reference is also copied even though the new line may not exist on the referenced requisition.

Delivery Order References

- For CDO and ADO documents, the Reference Type is always ***Partial*** on commodity lines and accounting lines since there is no referenced encumbrance document to be liquidated.

Objective 5

Creating a Solicitation

Creating the Solicitation

- ***Copy Forward*** from the requisition to create the solicitation document.

Entering the Solicitation Details

- Schedule of Events section
 - Insert a New Line to record any pre-bid meetings
 - Enter a line for each event if more than one event is scheduled
- Terms and Conditions section
 - Always select T&C: *ATTACH*
- Commodity section
 - Information is inferred from the requisition
 - The **CL (commodity line) Description** field automatically populates with the commodity code description from the COMM table
 - The **CL Description** entry infers onto the **Ext (extended) Description** field of the Commodity Line
 - The Commodity Line **Ext Description** field can be modified from what infers from the **CL Description** field and, is what is displayed to vendors in VSS when they are responding to bid opportunities.
 - You do have the option to edit the Extended Description to provide additional details on the commodities being solicited.
 - Save to populate the Commodity Email Push section, or validate the document

Entering the Solicitation Details

- Vendor List section
 - Information is inferred from the requisition Vendor section
- Vendor Free Form section
 - Information is inferred from the requisition
- Commodity Email Push section
 - Review to confirm all commodity codes listed are accurate
 - NOTE: Save from the Commodity section, or Validate from any document section to populate

Entering the Solicitation Details

- Publishing section
 - Establishes critical dates for solicitations
 - Let Date: The date the solicitation is scheduled to publish to VSS
 - Close Date / Time: The deadline established for vendors to respond to a solicitation
 - Prohibit Online Responses: If checked, prevents online responses via VSS
 - Allows online responses through VSS
- Validate
- Submit and Approve to Final

Objective 6

Publishing a Solicitation to VSS

Document Publishing

Publishing

Procurement Folder: 818401

Amendment Number:

Published Date:

Published Time:

Let Date: 07/13/2021 

Close Date: 07/23/2021 

Close Time: 13:30

Public Bid Opening Date: 

Public Bid Opening Time:

Create Vendor Notification:

Issue to Vendor Self Service:

Schedule of Events:

Terms and Conditions:

Evaluation Criteria:

Evaluation Criteria (Points):

Amendment History:

Document Attachments:

Publish Vendor List:

Commodity Description:

Item Shipping:

Item Specifications (Handling):

Item Specifications (Details):

Commodity Terms and Conditions:

Commodity Attachments:

Prohibit Online Responses:

AttachmentList:

Restrict Multiple Responses per Vendor TIN:

Confirming the Solicitation Published

- Verify the ***Published Date*** and ***Published Time*** populated on the document header, which should update after the next scheduled sync cycle has completed.

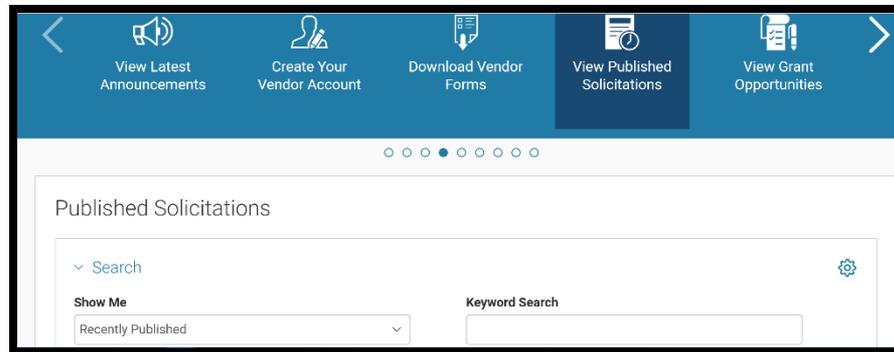
Let Date: 07/13/2021
Published Date:
Published Time:
Close Date: 07/23/2021
Close Time: 13:30



Let Date: 07/13/2021
Published Date: 07/13/2021
Published Time: 17:38
Close Date: 07/23/2021
Close Time: 13:30

Viewing the Published Solicitation

- From wvOASIS.gov, click on **VSS**
- Navigate to the **View Published Solicitations** icon on the VSS carousel



- Enter the specific solicitation document ID in the **Keyword Search** field, or search by **Recently Published** in the **Show Me** field.

Why Did the Solicitation Not Publish?

- Confirm the solicitation document went to Final.

Centralized Request for Quote(CRFQ) Dept: 0947 ID: ERP2200000006 Ver.: 1 Function: New Phase: Final

- Confirm the solicitation document assembled successfully.
 - Header/View ***Assembly Request***

[View Assembly Request](#)

Assemble Request							
Request Id	Job Id	User Id	Start Time	End Time	Status	Message	
✓ 544568	1852067	comerl	07-13-2021 16:47:59	07-13-2021 16:48:20	Successful	Assembly job complete	

First Prev Next Last

[View Job Log Messages](#)

Why Did the Solicitation Not Publish?

- Confirm the Publishing **Let Date** is correct and not a future date, unless intended to publish on a future date.
 - The document will not publish until the scheduled **Let Date**
 - Solicitations taken to **Final** late in the day may not publish until the next day's first sync cycle.

Let Date: 07/13/2021

Published Date:

Published Time:

Close Date: 07/23/2021

Close Time: 13:30

Objective 7

Monitoring the wvOASIS Cycle Dashboard



Cycle Dashboard

- The *wvOASIS Cycle Operations Dashboard* is an inquiry page on myApps to assist agency purchasers with delegated acquisitions
- When a vendor submits a solicitation response in Vendor Self Service (VSS), the document remains sealed in the **VSS electronic lockbox** until the solicitation closing date and time are reached
- Then, responses are copied from the lockbox to the procurement folder by a series of synchronizing interfaces known as the VSS Sync Cycle

wvOASIS Cycle Operations Dashboard

- Use the dashboard to know exactly when the cycle is complete, and when it is appropriate to load the solicitation responses to the EV
- To **refresh** the dashboard, click the *VSS Cycle Report* link located on the left side of the page

wvOASIS Cycle Operations Dashboard

- The VSS Sync Cycle runs every hour on the half hour throughout the day beginning around 8:30AM (08:30)
- The last sync cycle of the day runs around 5:30PM (17:30)
- Bid closing times are entered and displayed in 24-hour format
- Bid closings on the half hour are optimal; 11:30, 14:30, or 15:30, for example.
- The 12:30 cycle should be avoided because it is used occasionally to perform other technical tasks.
- The 1:30 cycle should be avoided for agency delegated bid closings, as this is when Purchasing Division schedules Central bid closings.

Questions

E-mail: FinanceTeam@wvoasis.gov

Website: wvOASIS.gov