

Request for Quotation

DNR209084

PAGE

ADDRESS:CORRESPONDENCE (CATHENTION CE

FRANK WHITTAKER

26812

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*C12101921 304-358-2284 MOR-AIR HEATING AC & REFRIGERA HC 32 BOX 4

UPPER TRACT WV 26866

DIVISION OF NATURAL RESOURCES LOST RIVER STATE PARK ATTN: PARK SUPERINTENDENT ROUTE 2, BOX 24 MATHIAS, WV

897-5372

ADDRESS CHANGES TO BE NOTED ABOVE

SHIP VIA FOB. FREIGHT TERMS DATE PRINTED TERMS OF SALE 12/16/2008 BID **BID OPENING DATE:** 02/04/2009 OPENING TIME 01:30PM CAT. UNIT PRICE AMOUNT LINE QUANTITY UOP ITEM NUMBER 031-06 LS 0001 49,500.00 49,500,00 AIR CONDITIONING AND HEATING, CENTRAL UNITS THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, THE WEST VIRGINIA DIVISION OF NATURAL RESOURCES, IS SOLICITING BIDS FOR HEATING VENTILATION AND AIR 2009 FEB 10 AM 9: 32 CONDITIONING (HVAC) SYSTEMS IN SEVERAL CABINS AT LOST RIVER STATE PARK, HARDY COUNTY, WV PER THE WV PURCHASING ATTACHED SPECIFICATIONS. DIVISION A MANDAYORY PRE-BID MEETING WILL BE HELD ON 01/13/09 # 10:00 AM AT THE PARK OFFICE. THECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO FRANK WHITTAKER IN THE WEST VIRGINIA PURCHASING DIVISION VIA FAX AT 304-558-4115 OR VIA EMAIL AT FRANK.M.WHITTAKERWWV.GOV. DEADLIND FOR ALL TECNICAL QUESTIONS IS 01/16/09 AT 3:00 PM. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY WILL BE ANSWERED BY ADDENDUM AFTER THE DEADLINE. EXHIBIT 5 WEST VIRGINIA CODE 21-1D-5 PROVIDES THAT: ANY SOLICITA TION FOR A PUBLIC IMPROVEMENT CONSTRUCTION CONTRACT REQUIRES EACH VENDOR THAT SUBMITS A BID FOR THE WORK TO SUBMIT AT THE SAME TIME AN AFFIDAVIT OF COMPLIANCE WITH THE ENCLOSED PURCHASING AFFIDAVIT MUST BE SIGNED AND SUBMITTED WITH THE BID AS EVIDENCE OF THE VENDOR'S COMPLIANCE WITH THE PROVISIONS OF ARTICLE 1D, SEE REVERSE SIDE FOR TERMS AND CONDITIONS TELEPHONE 04-358-2284 2-5-09 lorgard

20-2584963

GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

- 1. Awards will be made in the best interest of the State of West Virginia.
- 2. The State may accept or reject in part, or in whole, any bid.
- 3. All quotations are governed by the West Virginia Code and the Legislative Rules of the Purchasing Division.
- 4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
- 5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
- 6. Payment may only be made after the delivery and acceptance of goods or services.
- 7. Interest may be paid for late payment in accordance with the West Virginia Code.
- 8. Vendor preference will be granted upon written request in accordance with the West Virginia Code.
- 9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
- 10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
- 11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
- 12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
- 13. BANKRUPTCY: In the event the vendor/contractor files for bankruptcy protection, this Contract may be deemed null and void, and terminated without further order.
- 14. HIPAA BUSINESS ASSOCIATE ADDENDUM: The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (http://www.state.wv.us/admin/purchase/vrc/hipaa.htm) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
- 15. WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT: If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

- 1. Use the quotation forms provided by the Purchasing Division.
- 2. SPECIFICATIONS: Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as EQUAL to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
- 3. Complete all sections of the quotation form.
- 4. Unit prices shall prevail in case of discrepancy.
- 5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
- **6. BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130



VENDOR

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

Request for Quotation

RFO NUMBER DNR209084

***ADDRESS CORRESPONDENCE TO ATTENTION OF

FRANK WHITTAKER 304-558-2316

304-358-2284 *C12101921 MOR-AIR HEATING AC & REFRIGERA HC 32 BOX 4

UPPER TRACT WV 26866

DIVISION OF NATURAL RESOURCES LOST RIVER STATE PARK ATTN: PARK SUPERINTENDENT ROUTE 2, BOX 24 MATHIAS, WV 26812 897-5372

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ATTN: PARK SUPERINTENDENT
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26812 897-5372

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

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

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DATE PRINTED TERMS OF SALE SHIP VIA F.O.B. FREIGHT TERMS

DIVISION OF NATURAL RESOURCES LOST RIVER STATE PARK ATTN: PARK SUPERINTENDENT ROUTE 2, BOX 24

MATHIAS, WV

26812 897-5372

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STATE OF WEST VIRGINIA Purchasing Division

PURCHASING AFFIDAVIT

VENDOR OWING A DEBT TO THE STATE:

West Virginia Code §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

West Virginia Code §21-1D-5 provides that: Any solicitation for a public improvement construction contract shall require each vendor that submits a bid for the work to submit at the same time an affidavit that the vendor has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the West Virginia Code. A public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the West Virginia Code and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the West Virginia Code may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the state of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendors should visit www.state.wv.us/admin/purchase/privacy for the Notice of Agency Confidentiality Policies.

Under penalty of law for false swearing (West Virginia Code §61-5-3), it is hereby certified that the vendor acknowledges the information in this said affidavit and is in compliance with the requirements as stated.

Vendor's Name: Mor Air	Heating, Ale 4	Refrigeration LL	<u> </u>
Authorized Signature: Shaven		Date: 2-5-09	
Authorized Signature. <u>xxxxxxx</u>	· · · · · · · · · · · · · · · · · · ·		



DATE PRINTED

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

Request for Quotation

DNR209084

ADDRESS CORRESPONDENCE TO ATTENTION OF

FRANK WHITTAKER B04-558-2316

RFQ COPY TYPE NAME/ADDRESS HERE Mor-Air Heating Alc + ReFrig. LLC & ReFrig. LLC & Upper Tract. WV 26866

TERMS OF SALE

DIVISION OF NATURAL RESOURCES LOST RIVER STATE PARK ATTN: PARK SUPERINTENDENT ROUTE 2, BOX 24 MATHIAS, WV 26812 897-5372

SHIP VIA FO.B FREIGHTTERMS 01/30/2009 BID OPENING DATE: 02/10/2009 BID OPENING TIME 01.30PM LINE QUANTITY UOP **ITEM NUMBER** UNITPRICE AMOUNT ************ ADDENDUM NO 1 ************ THIS ADDENDUM IS ISSUED TO: 1. REPLACE THE ORIGINAL SPECIFICATIONS WITH THE ATTACHED REVISED SPECIFICATIONS. 2. TO PROVIDE PRE-BID SIGN SHEET, QUESTIONS & ANSWERS RESULTING FROM THE PRE-BID MEETING HELD ON 01/13/09 B. PROVIDE THE WEST VIRGINIA DRUG FREE WORKPLACE CONFORMANCE AFFIDAVIT. THIS AFFIDAVIT MUST BE SUBMITTED WITH THE BID! FAILURE TO SIBMIT THE AFFIDAVIT WITH THE BID SHALL RESULT IN DISQUALIFICATION OF THE BID. 4. TO CHANGE THE \$1D OPENING DATE AND TIME TO: BID OPENING DATE: 02/10/09 BID OPENING TIME: 1:30 PM 0001 LS 031 - 061 500,00 AIR CONDITIONING AND HEATING, CENTRAL UNITS SEE REVERSE SIDE FOR TERMS AND CONDITIONS Morford 20-2584963 FEIN ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



Request for Quotation

DNR209084

PAGE 2

ADDRESS CORRESPONDENCE TO ATTENTION OF

FRANK WHITTAKER 804-558-2316

RFQ COPY TYPE NAME/ADDRESS HERE	
Mor Air Heating, Alc 4	Rafrig.LLC
HC 32 Box 4 Upper Tract, WV 2	6866

DIVISION OF NATURAL RESOURCES LOST RIVER STATE PARK ATTN: PARK SUPERINTENDENT ROUTE 2, BOX 24 MATHIAS, WV

26812 897-5372

DATE PRIN	TED	TEF	MS OF	ALE			5HIP	VIA		F.0:8		FREIGHTTERMS
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WV-36 REV. 10/81

STATE OF WEST VIRGINIA **PURCHASING CONTINUATION SHEET**

BUYER: PAGE Req. or PO# 44 DNR209084

VENDOR Mor-Air Heating AlC + Refrigeration LLC Spending Unit:

item No:	Quantity	Description	Unit Price	Amount
	Manda and the state of the stat	Replacement of existing oil furnace units with new oil furnace units in cabin numbers 15, 16, 17, 18, 20, 22, and 23. The following equipment is to be installed in each cabin:		
1	7	Lennox Elite Series 023, 7400 BTU, 83% AFUE oil furnace or equal. Unit must have a lifetime warranty on heat exchanger with a minimum five (5) year warranty on remaining covered components.	232500	/6, 275.°
		Installation of air conditioning units in cabin numbers 14, 15, 16, 17, 18, 20, 22, 23 and 25. The following equipment is to be installed in each cabin:		
2	9	Lennox Merit Series 14ACX, 1 5 ton, 14 SEER air conditioner or equal. Unit must have a five(5) year warranty on compressor with a five (5) year warranty on remaining covered components.	2031.90	18,287.10
3	9	Lennox Model C33 coil or equal	544,10	4896.90
		Installation of air conditioning units in cabin numbers 7 and 26 The following equipment is to be installed in each cabin:		
4	2	Lennox Merit Series 14ACX 2 5 ton unit or equal Unit must have a five(5) year warranty on compressor with a five (5) year warranty on remaining covered components.	2565.10	5130,20
5	2	Lennox Model C33 coil or equal.	99250	1985.00
	,	Installation of thermostats in cabins 7, 14, 15, 16, 17, 18, 20, 22, 23, 25, and 26. The following equipment is to be installed in each cabin:		
6		Lennox ComfortSense 3000 Series non-programmable or equal	128.20	1410,20
7	8	Cabins # 15,16,17,18,20,22,23,26 Installation of air fitter racks	128:20	1025.60
8		Cabin #25 Relocation of existing furnace to allow proper clearances for A/C and install air filter rack	490,00	490.00
		The scope of work includes the complete removal and disposal of all existing oil furnace units; installation and testing of new oil heat furnace units and air conditioning units; modifications to existing ductwork to achieve proper air flow,all grills/diffusers to have dampers West Virginia Building prevailing wage rates must be paid for Hardy County, West Virginia (http://www.wvsos.com/adlaw/wagerates/building/building08/hardy.pdf).		

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		ALL WORK MUST BE SCHEDULED THROUGH THE LOST RIVER STATE PARK MAIN OFFICE (304-897-5372) TO ACCOMMODATE CABIN RENTALS.			
TOTAL THIS PAGE 49,500.00					

Jan 2009



State of West Virginia DRUG FREE WORKPLACE CONFORMANCE AFFIDAVIT West Virginia Code §21-1D-5

STATE OF WEST VIRGINIA,				
COUNTY OF Pendleton, TO-WIT:				
I, <u>Sharon MorFord</u> , after being first duly sworn, depose and state as follows:				
1. I am an employee of Mor-Air Heating, A/C Y ReFright; and, (Company Name)				
2. I do hereby attest that Mor-Air Heating, AlC + ReFrig. LLC (Company Name)				
maintains a valid written drug free workplace policy and that such policy is in compliance with West Virginia Code §21-1D-5.				
The above statements are sworn to under the penalty of perjury.				
Mor-Aun Heating A/C & Rofrig LLC (Company Name)				
By: Sharen M. Mayord				
Title: Member				
Date: 2-5-09				
Taken, subscribed and sworn to before me this $\frac{5^{th}}{}$ day of February 2009				
By Commission expires 9/3/09				
OFFICIAL SEAL NOTARY PUBLIC STATE OF WEST VIRGINIA DIANA K. THOMPSON HG 22 BOX 1H HIDDER TRACT W. 26865-9609 (Notary Public)				
THIS AFFIDAVIT MUST BE SUBMITTED WITH THE BID IN ORDER TO COMPLY WITH WV CODE PROVISIONS. FAILURE TO INCLUDE THE				
AFFIDAVIT WITH THE BID SHALL RESULT IN DISQUALIFICATION OF THE BID.				
IRE DID:				

ERIE INSURANCE PROPERTY & CASUALTY COMPANY BID BOND

Know All Alen by These Presents,	Bond No EE4021					
That we,Mor-Air, Heating,. AC. & .Refrigeration (hereinafter called the Principal) as Principal, and the ERIE INS Erie, Pennsylvania, a corporation duly organized under the	URANCE PROPERTY & CASUALTY COMPANY, of					
called the Surety), as Surety, are held and firmly bound unto Lost River State Park Route 2 Box 24 Matlhereinafter called the Obligee in the	hias, WV 26812					
Fifty Thousand						
Signed, sealed and dated this 4th	day of February , A.D. 20.09					
THE CONDITION OF THIS OBLIGATION IS SUCH: The	at, if the Obligee shall make any award within 30					
days to the Principal for HYAC. Replacement on mul	tiple units					
	• • • • • • • • • • • • • • • • • • • •					
according to the terms of the proposal or bid made by the Principal therefor, and the Principal shall duly make and enter into a contract with the Obligee in accordance with the terms of said proposal or bid and award and shall give bond for the faithful performance thereof with the Surety or Sureties approved by the Obligee; or if the Principal shall, in case of failure so to do, pay the Obligee the damages which the Obligee may suffer by reason of such failure, not exceeding the penalty of this bond, then this obligation shall be null and void; otherwise it shall be and remain in full force and effect.						
In Testimony Whereof, the Principal and Surety have caused these presents to be duly signed and sealed.						
	Principal Sharon. Morford					
Witness: Kumberly P. Blankenship	By: Sharon Moyord					
Witness: Patsy L Hemmer	ERIE INSURANCE PROPERTY & CASUALTY COMPANY By: Attorney-in-Fact					



ERIE INSURANCE PROPERTY & CASUALTY COMPANY ERIE, PA 16530 POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That the ERIE INSURANCE PROPERTY & CASUALTY COMPANY, a corporation duly organized under the laws of the Commonwealth of Pennsylvania, does hereby make, constitute and appoint

a corporation duly organized under the laws of the Common	wealth of Pennsylvania, does	hereby make, constitute and appoint
John	Paul Hott, II	
individually, its true and lawful Attorney-in-Fact, to make, deed: any and all bonds and undertakings of suretyship,		
And to bind the ERIE INSURANCE PROPERTY & CASI such bonds and undertakings and other writings obligatory ERIE INSURANCE PROPERTY & CASUALTY COMP. hereby ratifies and confirms all that its said Attorney(s)-in-	OALTY COMPANY thereby in the nature thereof were si ANY and sealed and atteste	y as fully and to the same extent as if gned by the appropriate officer of the d by one other of such officers, and
The Power of Attorney is granted under and by authority of Board of Directors of ERIE INSURANCE PROPERTY & said Resolution has not been amended or repealed:	CASUALTY COMPANY or	n the 13th day of December 2005 and
"Resolved, that the President, or any Senior Vice President Attorney(s)-in-Fact and to authorize them to execute on beha of indemnity and other writings obligatory in the nature ther revoke the power and authority given to him; and	If of the Company, bonds and u	indertakings, recognizances, contracts
Resolved, that Attorney(s)-in-Fact shall have power and autissued to them, to execute and deliver on behalf of the Compand other writings obligatory in the nature thereof. The corporings, recognizances, contract of indemnity and other writings	oany, bonds and undertakings, a prate seal is not necessary for the s obligatory in the nature therec	recognizances, contracts of indemnity the validity of any bonds and undertak- of."
This Power of Attorney is signed and sealed by facsimiles unanimous consent of the Board of Directors of ERIE IN Resolution has not been amended or repealed:	SURANCE PROPERTY &	CASUALTY COMPANY and said
"Resolved, that the signature of Jeffrey A. Ludrof, as Preside Company may be affixed by the following facsimiles on any recognizances, contracts and other writings in the nature the pany, and the Seal of the Company may also be affixed by the Attorney and only under such circumstances, shall said facsi	Limited Power of Attorney for reof, and the signature of J. R. e following facsimiles to any ce	the execution of bonds, undertakings, Van Gorder, as Secretary of the Com- rtificate of any such Limited Power of
IN WITNESS WHEREOF, the ERIE INSURANCE PROPERTY & CASUALTY COMPANY has caused these presents to be signed by its President and Chief Executive Officer, and its corporate seal to be hereto affixed this 13th day of December, 2005.	1993 ORIGINAL PARAMETERS OF CHARLES OF CHARL	Jeffrey A. Ludrof President and Chief Executive Officer
STATE OF PENNSYLVANIA SS. COUNTY OF ERIE	The state of the s	
On this 13th day of December, A.D. 2005, before me personally came Jeffrey A. Ludrof, to me known, who being by me duly sworn, did depose and say: that he is President and Chief Executive Officer of ERIE INSURANCE PROPERTY & CASUALTY COMPANY, the corporation described in and which executed the above instrument; that he knows the Seal of said corporation; that the Seal affixed to the said instrument is such corporate Seal; that it was so affixed by order of the Board of Directors of said corporation and that he signed his name thereto by like order.	OF HANDEN OF HAND OF H	Mula M. Husch My commission expires June 27, 2008 Notary Public
CERTIFICATE	OPERTY &	
I, J. R. Van Gorder, as Secretary of the ERIE INSURANCE PROPERTY & CASUALTY COMPANY, do hereby certify that the original POWER OF ATTORNEY, of which the foregoing is a full, true and correct copy, is still in full force and effect as of the date below.	1993 THE	100/10

Bank Edicin

this 30th day of January 20 L

In witness whereof, I have hereunto subscribed my name and affixed corporate Seal of the Company by facsimiles pursuant to the action of the Board of Directors of the Company,

WV STATE GOVERNMENT

HIPAA BUSINESS ASSOCIATE ADDENDUM

This Health Insurance Portability and Accountability Act of 1996 (hereafter, HIPAA) Business Associate Addendum ("Addendum") is made a part of the Agreement ("Agreement") by and between the State of West Virginia ("Agency"), and Business Associate ("Associate"), and is effective on the date of execution of a binding agreement with the Agency.

Whereas it is desirable, in order to further the continued efficient operations of Agency to disclose to its Associate certain information which may contain confidential individually identifiable health information (hereafter, Protected Health Information or PHI); and

Whereas, it is the desire of both parties that the confidentiality of the PHI disclosed hereunder be maintained and treated in accordance with all applicable laws relating to confidentiality, including the Privacy and Security Rules, and the parties do agree to at all times treat the PHI and interpret this Addendum consistent with that desire.

NOW THEREFORE; the parties agree that in consideration of the mutual promises herein, in the Agreement; and of the exchange of PHI hereunder that:

1. Definitions.

- a. Terms used, but not otherwise defined, in this Addendum shall have the same meaning as those terms in the Privacy and Security Rules.
- **b. Privacy Rule.** Privacy Rule means the Standards for Privacy of Individually Identifiable Health Information found at 45 CFR Parts 160 and Part 164, Subparts A and E, as amended.
- c. Security Rule. Security Rule means the Standards for the security of electronic protected health information found at 45 CFR Part 164, Subpart C, as amended.
- d. Security Incident. Any known successful or unsuccessful attempt by an authorized or unauthorized individual to inappropriately use, disclose, modify, access, or destroy any information.

2. PHI Disclosed; Permitted Uses.

- **a. PHI Described.** PHI disclosed by the Agency to the Associate, PHI created by the Associate on behalf of the Agency, and PHI received by the Associate from a third party on behalf of the Agency are disclosable under this Addendum. The disclosable PHI is limited to the minimum necessary to complete the tasks, or to provide the services, associated with the terms of the original agreement.
- **b. Purposes.** Except as otherwise limited in this Addendum, Associate may use or disclose the PHI on behalf of, or to provide services to, Agency for the purposes necessary to complete the tasks, or provide the services, associated with, and required by the terms of the original agreement, if such use or disclosure of the PHI would not violate the Privacy or Security Rules or applicable state law if done by Agency or violate the minimum necessary policies and procedures of the Agency.

- h. Access to PHI. Associate shall make the PHI maintained by Associate or its agents or subcontractors in Designated Record Sets available to Agency for inspection and copying within ten (10) days of a request by Agency to enable Agency to fulfill its obligations under the Privacy Rule, including, but not limited to, 45 CFR § 164.524.
- i. Amendment of PHI. Within ten (10) days of receipt of a request from Agency for an amendment of the PHI or a record about an individual contained in a Designated Record Set, Associate or its agents or subcontractors shall make such PHI available to Agency for amendment and incorporate any such amendment to enable Agency to fulfill its obligations under the Privacy Rule, including, but not limited to, 45 CFR § 164.526.
- j. Retention of PHI. Notwithstanding section 4.a. of this Addendum, Associate and its subcontractors or agents shall retain all PHI pursuant to state and federal law and shall continue to maintain the PHI required under Section 3.f. of this Addendum for a period of six (6) years after termination of the Agreement, or longer if required under state law.
- **k. Agents, Subcontractors Compliance.** The Associate will ensure that any of its agents, including any subcontractors, to whom it provides any of the PHI it receives hereunder, or to whom it provides any PHI which the Associate creates or receives on behalf of the Agency, agree to the restrictions and conditions which apply to the Associate hereunder.
- I. Amendments. The Associate shall make available to the specific Individual to whom it applies any PHI; make such PHI available for amendment; and make available the PHI required to provide an accounting of disclosures, all to the extent required by 45 CFR §§ 164.524, 164.526, and 164.528 respectively.
- m. Federal Access. The Associate shall make its internal practices, books, and records relating to the use and disclosure of PHI received from, or created or received by the Associate on behalf of the Agency available to the U.S. Secretary of Health and Human Services consistent with 45 CFR § 164.504.
- n. Security. The Associate shall take all steps necessary to ensure the continuous security of all PHI and data systems containing PHI, and provide data security procedures for the use of the Agency at the end of the contract period. These steps shall include, at a minimum, the requirements contained in the West Virginia Office of Technology Policy No. WVOT-PO1001 (1-18-07) which may be found at: http://www.state.wv.us/ot/PDF/Document_center/SecurityPol0107.pdf

o. Notification of Breach. During the term of this Agreement:

- i. The Associate shall notify the Agency immediately by telephone call plus e-mail or fax upon the discovery of breach of security of PHI, where the use or disclosure is not provided for by this addendum of which it becomes aware, if the PHI was, or is reasonably believed to have been, acquired by an unauthorized person; or within 24 hours by e-mail or fax of any suspected security incident, intrusion or unauthorized use or disclosure of PHI in violation of this Agreement and this Addendum, or potential loss of confidential data affecting this Agreement. Notification shall be provided to the Agency contract manager (see www.state.wv.us/admin/purchase/vrc/agencyli.htm) and the Office of Technology Help Desk at (304) 558.9966; (877) 558.9966 (Toll Free); or servicedesk@wv.gov.
- ii. The Associate shall immediately investigate such security incident, breach, or unauthorized use or disclosure of PHI or confidential data. Within 72 hours of the discovery, the Associate shall notify the Agency contract manager, and the Office of Technology Help Desk of: (a) What data elements were involved and the extent of the data involved in the

- **c.** Electronic Transmission. Except as permitted by law or this Addendum, the PHI or any data generated from the PHI which would permit identification of an Individual must not be transmitted to another party by electronic or other means for additional uses not authorized by this Addendum or to another contractor, or allied agency, or affiliate without prior written approval of Agency.
- **d. No Sales.** Reports or data containing the PHI may not be sold without Agency's or the affected Individual's written consent.
- e. No Third-Party Beneficiaries. Nothing express or implied in this Addendum is intended to confer, nor shall anything herein confer, upon any person other than Agency, Associate and their respective successors or assigns, any rights remedies, obligations or liabilities whatsoever.
- **f. Interpretation.** The provisions of this Addendum shall prevail over any provisions in the Agreement that may conflict or appear inconsistent with any provisions in this Addendum. The interpretation of this Addendum shall be made under the laws of the state of West Virginia.
- **g. Amendment.** The parties agree that to the extent necessary to comply with applicable law they will agree to further amend this Addendum.
- h. Additional Terms and Conditions. Additional discretionary terms may be included in the release order or change order process.

APPROVED AS TO FORM THIS 2014

DAY OF Secentre , 2007

DARRELL V. McGRAW, JR. ATTORNEY GENERAL

DEPUZY ATTORNEY GENERAL