

# SUGGESTED PURCHASING FILE DOCUMENTS

## Agency-Delegated Purchases

This document is provided as a guide to suggested inclusions in your agency purchasing file. Handbook references are from the West Virginia Purchasing Division Procedures Handbook (**Effective July 1, 2017**). Not all documents are required for all purchases. Those that are only sometimes required are designated with "IA" (If Applicable).

### Documents generated before award:

	<u>Handbook Section</u>
• Specifications	[3.4, 3.4.2, 5.2.3]
• Bids received (WV-49, or <b>wvOASIS</b> )	[5.1.2, 5.1.3]
• Pre-Approvals (IA; may include CTO, Correctional Industries, Purchasing Division, WVARF, et cetera)	[7.2, 7.3, 7.8, 7.11] [3.6.2.1]
• Mandatory pre-bid attendee list (IA)	[6.2.8]
• Copy of Advertisement (IA)	[5.2.3]
• Documentation of emergency purchase (IA)	[3.7.1.4]
• Documentation of direct purchase/sole source (IA)	[3.7.1.5]

### Documents generated/obtained for the award:

	<u>Handbook Section</u>
• Purchase Order ( <b>wvOASIS award document</b> )*	[5.1.2, 5.1.3]
• Purchase Affidavit*	[5.2.3]
• Verification of vendor registration*	[5.2.3]
• Workers' Compensation/BEP account search*	[5.2.3]
• Resident Vendor Preference	[5.1, 6.3]
• Certificate of Non-Conflict of Interest (IA)	[5.2.3]
• Agreement Addendum (WV-96, IA)	[3.10.2.3, 5.2.3]
• Justification for award to other than low bid (IA)	[5.2.3]
• Hospitality form (TMO 3, IA)	[9.8]
• Insurance certificate (IA)	[3.10.3.1]
• Workers' Compensation certificate (IA)	[3.10.3.1]
• WV Contractor's License certificate (IA)	[3.10.3.1]

### Documents generated/obtained after the award:

	<u>Handbook Section</u>
• Receiving documents	[5.3]
• Evidence of fixed asset registration (IA)	[5.5]

### Additional documents:

- All correspondence (memoranda, letters, emails, et cetera) \*

\*Documents that should be included for each renewal of a contract.