



VENDOR REGISTRATION

2021 Agency Purchasing Webinar Conference
Presented by: Mark Totten, Technical Services Manager
West Virginia Purchasing Division



Objectives

- Discuss who is required to register as a vendor and when the registration fee is applicable
- Review the process for *agencies* to check a vendor's registration status using the VCUST table
- Discuss ways to best interpret vendor registration data found in the wvOASIS system
- Discuss the avenues to register or update a vendor's record with the state, including the creation of wvOASIS documents
- Explain transactional vendor registration fee-exemption process
- Explain the responsibilities of the agency and the Purchasing Division in the vendor registration process

Definitions

- **Vendor:** Referenced on expenditure transactions
- **Customer:** Referenced on revenue transactions
- **Vendor Self-Service:** Vendor portal
- **VCUST:** Vendor/Customer table in *WV*OASIS Advantage Financial
- **VCC:** Vendor/Customer Creation
- **VCM:** Vendor/Customer Maintenance
- **Transaction:** The combined Ordering and Payment process

Vendor Registration in *Code*

- Vendor Registration is required by *West Virginia Code* §5A-3-12. It requires:
 - Disclosure of Information
 - Payment of annual fee
 - Both parts required to complete registration

Purchasing Division Vendor Registration

Disclosure of Information + Payment of Annual Fee

Information to Be Disclosed

- Information required from registered vendors
- Name(s)
- Business address
 - Ordering and Payment address required for **vendors**
 - Ordering, Payment, and Billing required for **customers**
- Telephone Number
- Owners or officers
- City and state of residence for the owners or officers
- Agent representation
- Dun & Bradstreet number and rating, if any (vendors may find through dnb.com)
- Banking reference(s), if any



Non-Law Reasons for Vendor Registration

- Protects the state
 - Fraud
 - Illegitimate businesses
- Provides transparency and accountability
- Provides a centralized clearinghouse for vendor registration information

- Handouts:

N.C. WOMAN INDICTED IN \$2 MILLION AUDITOR SCAM MONEY SENT TO KENYAN BANKS, FEDS SAY
Publication: THE CHARLESTON GAZETTE
Published: Thursday, June 14, 2007
By: ANDREW CLEVELINGER STAFF WRITER

A federal grand jury in Charleston has indicted a North Carolina woman on a conspiracy that defrauded the West Virginia Auditor's Office of \$2 million.

In an eight-page indictment unsealed Wednesday, federal prosecutors charged Angela Munroe of Chicago, Kansas, 33 of Raleigh with obtaining a false Social Security passport in the name of Cynthia Ann Cline, then using the false identity to conduct money operations in West Virginia.

Two of the grand jury indictments had names similar to a witness during a hearing with West Virginia's government, including Eileen Consulting Corp. and Upsilon Corp., according to the indictment. The indictment also names the defendant, Cynthia Ann Cline, as Upsilon Corp.

Cheng-Kuanank's attorney said his bank accounts were the only authorized business names at TCF Bank in Maryland. Using those names, she then contacted West Virginia Auditor Glen Quinn's office and had the funds diverted to the West Virginia accounts, the indictment says.

Cheng-Kuanank said she was arrested in New York in the grand jury indictment, but she began her investigation in March in New York. According to the indictment.

Quinn's office discovered the missing money in the beginning of May. According to the indictment, the first payment of \$975,000 made to Epsilon Consulting for services provided to the state Department of Health and Human Resources was transferred in March.

Over the next few weeks, Cheng-Kuanank said, she accounted for a roughly \$2 million in transfers totaling \$9,327,920 to banks in Kenya, the indictment charges.

The indictment accuses Cheng-Kuanank of using a money order as well as the Mike DeLoe account, said Assistant U.S. Attorney Robert G. Quinn, head of the economic crimes division.

Cheng-Kuanank was arrested in New York on state charges and had her initial appearance in court in Raleigh earlier today, he said. U.S. Marshals are transporting her to West Virginia, where she will be arraigned on the federal charges.

Quinn said he had no information on whether Cheng-Kuanank had been taken into custody or whether she was being held in custody.

The U.S. Federal Reserve and the West Virginia Commission of Special Investigations are handling the investigation, he said.

State Auditor Glen Quinn said he was "shocked" at the indictment of the U.S. Attorney's Office and the U.S. District Court in Raleigh, he said.

The indictment also charges that Cheng-Kuanank used her name to obtain a credit card and to open a bank account in New York. Cheng-Kuanank said she had no knowledge of the indictment.

THREE PLEAD GUILTY IN FRAUD SCHEME PLOT HATCHED IN KENYA COSTS WEST VIRGINIA GOVERNMENT \$2 MILLION
Publication: THE CHARLESTON GAZETTE
Published: Tuesday, May 22, 2007
By: ANDREW CLEVELINGER STAFF WRITER

The first three Kenyan nationals charged in the West Virginia Auditor's Office fraud scheme pleaded guilty in federal court Monday.

Michael M. "Mike" Quinn of Clay, Ohio, and Alan C. George of Minnesota pleaded guilty to conspiracy to commit mail fraud, Robert M. "Bob" Quinn of Ohio, pleaded guilty to aiding and abetting mail and wire fraud.

All three were indicted in an indictment returned by federal grand jury in West Virginia. The indictment charges the three with conspiring to defraud the state by using their names to obtain money from the state's accounts set up with various banks in Kenya.

Assistant U.S. Attorney Susan Robinson said during Monday's plea hearings at the court in Kenya in late 2006.

Quinn said Angela Cheng-Kuanank, a Kenyan woman who was indicted in Raleigh, N.C., returned to Kenya, where she contacted Quinn and had a photo used to make a false Social Security passport under the name Cynthia Ann Cline, Robinson said.

Cheng-Kuanank was arrested and indicted in June 2007, she reported that she lived in a number of cities in Kenya, including Nairobi, Mombasa, and Kisumu, and she had several addresses in the state.

Robinson said that Cheng-Kuanank, who cooperated with investigators following her arrest in 2006, gave a list of the names of the banks in Kenya that she used to open accounts. They also provided her with a Social Security number, which she used to open accounts in West Virginia.

Robinson said that Cheng-Kuanank's attorney said she had been arrested in New York in the indictment.

The indictment charges that Cheng-Kuanank used her name to obtain a credit card and to open a bank account in New York. Cheng-Kuanank said she had no knowledge of the indictment.

The indictment also charges that Cheng-Kuanank used her name to obtain a credit card and to open a bank account in New York. Cheng-Kuanank said she had no knowledge of the indictment.

Code of State Rules 148 CSR 1

- 148-1-6. Registration, Bidding, and Award
 - Except for purchasing card vendors providing travel-related services or receiving an aggregate total yearly payment less than \$25,000 from a spending unit, all vendors shall register with the Purchasing Division.
 - Vendors may register through the Vendor Self-Service portal or by completing the vendor registration and disclosure statement provided by the Purchasing Division.

148 CSR 1 (Continued)

- Except for purchasing card vendors providing travel-related services or receiving an aggregate total yearly payment less than \$25,000 from a spending unit, vendors receiving orders for goods or services exceeding \$2,500, regardless of payment method, shall pay an annual fee of \$125. A vendor with multiple locations shall pay only one fee when operating under one Federal Employer Identification Number (FEIN).
- The Director may waive the registration requirements in the case of any vendor who is a sole-source provider.

148 CSR 1 (Continued)

- Director shall not award any contract to any vendor not properly registered with the Purchasing Division.
- Vendor 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 other state agencies or political subdivisions. The vendor must provide all necessary releases to obtain information necessary to verify that the vendor is licensed and in good standing with the above entities.
 - Status with some agencies reflected under "Fee and Vendor Compliance Holds" in VCUST

Other Agencies' Ordering Requirements

Fee and Vendor Compliance Holds on VCUST Table	State Agency Responsible
"Tax Clearance"	West Virginia State Tax Department
"Unemployment Insurance"	WorkForce West Virginia
"Worker's Compensation"	West Virginia Offices of the Insurance Commissioner
"Secretary of State Registration"	West Virginia Secretary of State (must be verified manually)

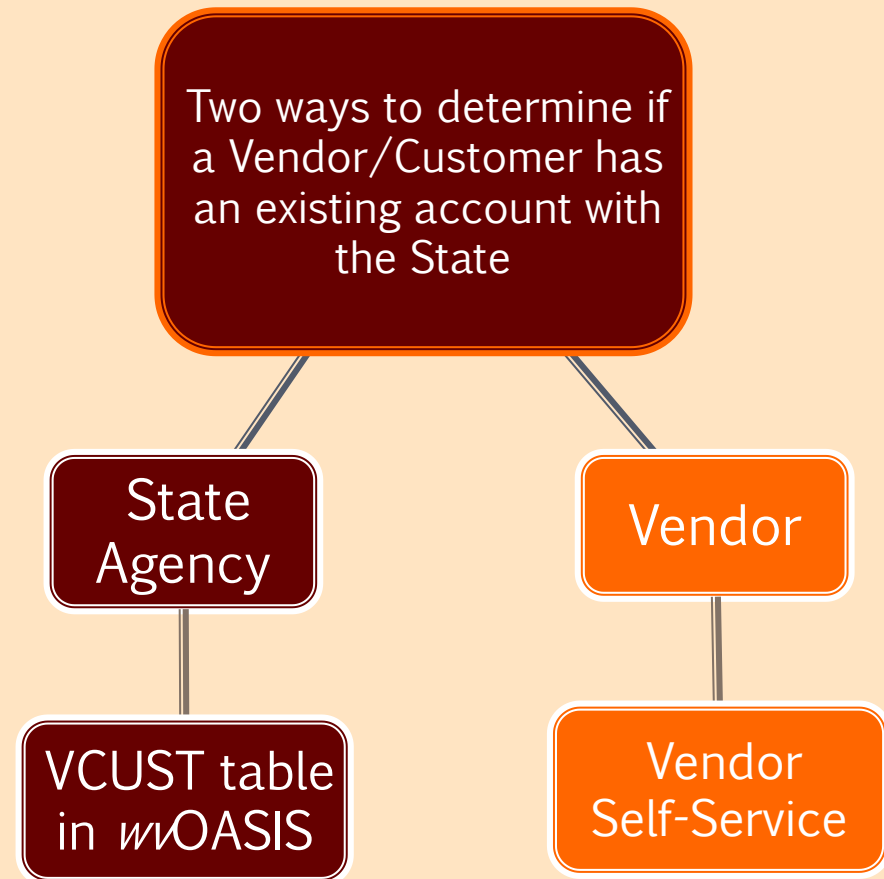
Ordering and Payment

- Two main components in a state procurement transaction.
 - Ordering, or “Order From.”
 - Order-from file formerly stored in the TEAM Purchasing System.
 - Payment, or “Remit To.”
 - Remit-to file formerly stored in WVFIMS.

	Order From	Remit To
DOA Agency Responsible	Purchasing Division	Finance Division
Representative field in wvOASIS's VCUST table under “Disbursement Options”	“Prevent New Orders”	“Hold Payment”

Two Ways to Determine if a Vendor/Customer Has an Existing Account with the State



- Before a state agency proceeds with the vendor registration process or a procurement document
- “Ready, Aim, Fire”
 - Not “Fire, Ready, Aim”
- Ensure vendor registration is complete prior to your agency issuing a purchase order, written or verbal, and before receiving goods or services from vendor
- Promote vendor use of VSS portal for registration or furnish WV-1 form
 - Do not complete any portion of paper forms for vendor
- If necessary, guide vendor to headquarters account for their active tax identification number



Agencies May Check a Vendor's Registration Status

- Check VCUST table in *WV*OASIS to see if a vendor is already registered
- Log in to *WV*OASIS Financial
- “Jump to” VCUST
- Search by Tax Identification Number (TIN) or Legal Name
- If multiple Vendor/Customer records exist, determine which one is the appropriate one

Agencies May Check a Vendor's Registration Status


Jump to:   Home

Procurement | Budgeting | Accounts Receivable | A

Legal Name : Vendor Active Status :

Alias/DBA : Customer Active Status :

Vendor/Customer : VSS Registered :

Taxpayer ID Number :  Bankruptcy :

Last Name :

[Ok](#) [Clear](#) [Cancel](#)

Vendor/Customer	Legal Name	Vendor Active Status	Customer Active Status	Previous Name
✓ 000000180233	HEWLETT PACKARD STATE & LOCAL	Active	Inactive	
000000180234	HEWLETT PACKARD STATE & LOCAL ENTERPRISE SERVICES	Active	Inactive	
000000231043	HEWLETT PACKARD	Active	Inactive	
000000231044	HEWLETT PACKARD COMPANY	Active	Inactive	

First Prev Next Last

- Vendor “Active” Status is not a reflection of any state agency’s registration.

Verifying the Two Requirements: Disclosure of Information

- Information within VCUST shows a state employee if vendor has provided the two requirements for registration: the Disclosure of Information (1) and the payment of the \$125 annual fee (2).
- 1st requirement can be verified under “Disclosures” on the Document Navigator.

The screenshot displays the W/OASIS system interface. At the top left is the W/OASIS logo. The top right shows a search bar with 'VCUST' and a 'Go' button. Below the logo is a navigation bar with 'Welcome, Mark Totten' and menu items: 'Procurement', 'Budgeting', 'Accounts Receivable', and 'Accounts Payable'. A left sidebar contains a list of menu items: 'Close', 'Vendor/Customer', 'Address', 'Business Type', 'Service Area', 'Commodity', 'Authorized Dept.', 'Prevent Spending', 'Prevent Orders', 'Certification', 'Disclosures' (highlighted), 'Change Management', and 'Vendor User Information'. The main content area is titled 'Vendor/Customer' and contains a 'Disclosures' section. This section includes a table with columns: 'Disclosure Type', 'Name', 'Title', 'City', and 'State/Province'. Below the table are navigation links: 'First', 'Prev', 'Next', and 'Last'. There are also action links: 'Save', 'Undo', 'Delete', 'Insert', 'Copy', and 'Paste'. Below these are input fields for 'Vendor/Customer', 'Disclosure Type' (a dropdown menu), 'Name', 'Title', 'City', 'State/Province' (with a dropdown icon), and 'Phone'.

Two Requirements: Payment of Annual Fee

- Information within VCUST shows a state employee if vendor has provided the two requirements for registration: the Disclosure of Information (1) and the payment of the \$125 annual fee (2).
- 2nd requirement can be verified under “Vendor/Customer” on the Document Navigator by checking Registration Expiration Date.

The screenshot displays the W/OASIS web application interface. At the top left is the W/OASIS logo. The top right corner features a search bar with "VCUST" entered and a "Go" button. Below the logo, a navigation bar includes "Welcome, Mark Totten" and menu items for "Procurement", "Budgeting", "Accounts Receivable", and "Accounts Payable". A left-hand sidebar contains a "Close" button and a list of menu items: "Vendor/Customer" (highlighted with a checkmark), "General Info", "Headquarters", "Organization", "Disbursement Options", "Prenote/EFT", "Remittance Advice", "Vendor Terms", "Accounts Receivable", "eMALL", and "Location Information". The main content area is divided into two sections: "Location Information" and "Fee and Vendor Compliance Holds".

Location Information

- *Verify My Locations by :
- Vendor Verification Based On :
- Vendor Verification Password :
- Confirm Verifications :

Fee and Vendor Compliance Holds

Registration Application Date : <input type="text"/>	Tax Clearance : <input type="checkbox"/>
Registration Effective Date : <input type="text"/>	Unemployment Insurance : <input type="checkbox"/>
Registration Expiration Date : <input type="text"/>	Worker's Compensation : <input type="checkbox"/>
Pre-Registration Code : <input type="text"/>	Secretary of State Registration : <input type="checkbox"/>
	Federal Debarred : <input type="checkbox"/>

Interpreting the Search Results You See in VCUST

- *WV*OASIS VCUST table made up of vendor data from multiple legacy (pre-*WV*OASIS) state systems, including:
 - DOA Purchasing Division's TEAM Purchasing System
 - DOA Finance Division's WVFIMS System
 - WV State Auditor's Office P-Card Vendor File
- As a result of the “duplicate” *WV*OASIS VCUST record entries, there are some things you should know as we procure with *WV*OASIS.

Interpreting the Search Results You See in VCUST

- Identify the vendor/customer's headquarters account for their valid federal tax ID
 - If you find a vendor account on VCUST, check under the “Headquarters” tab to see if the record is the company's Headquarters Account, as this is the account that should be used by state agencies. In addition, you will encounter the least amount of opposition with holds.
 - If you are in touch with the vendor, verify (“fingerprint”) the entity's active federal tax ID under which they are currently operating.

The screenshot displays the WOASIS system interface. At the top left is the WOASIS logo. To the right, there is a search bar with 'Jump to: VCUST' and a 'Go' button. Below the logo, a navigation bar shows 'Welcome, Mark Totten' and several menu items: 'Procurement', 'Budgeting', 'Accounts Receivable', and 'Acco'. A sidebar on the left contains a 'Close' button and a list of tabs: 'Vendor/Customer' (selected with a checkmark), 'General Info', 'Headquarters', 'Organization', and 'Disbursement Options'. The main content area is titled 'Headquarters' and contains the following fields:

Headquarters Account :	<input checked="" type="checkbox"/> Yes	Web Address http:// :	<input type="text"/>
Headquarters Account Code :	VC0000021753	Catalog DUNS :	<input type="text"/>
Headquarters Account Legal Name :	FLYING SQUIRREL RAN	Taxpayer ID Number :	463404037
Franchise Account :	<input type="checkbox"/>	Taxpayer ID Number Type :	EIN

Interpreting the Search Results You See in VCUST

- When doing a name search in VCUST, use the “wildcard” as much as possible, such as between initials.
 - Example: You may find just one or two listings under *JP Morgan*, whereas, you may find four or five listings under *J*P*Morgan*

Search - Internet Explorer

Legal Name : *J*P*Morgan* X

Vendor Active Status : [] v

Alias/DBA : []

Customer Active Status : [] v

Vendor/Customer : []

VSS Registered : [] v

Taxpayer ID Number : []

Bankruptcy : [] v

Last Name : []

[Ok](#) [Clear](#) [Cancel](#)

Interpreting the Search Results You See in VCUST

- Navigating through “duplicate” W/OASIS VCUST records and processing successfully
 - If multiple accounts are found under the same FEIN with different variations/abbreviations of the company name, then only the Headquarters account should be utilized, as the other accounts are considered duplicate accounts and some may have been rendered “Inactive” or placed on “Discontinue - No New Business”

Vendor/Customer	Legal Name	Vendor Active Status	Customer Active Status	Previous Name
✓ 000000205731	WALTERS CONSTRUCTION, INC.	Active	Inactive	
000000205732	WALTERS CONSTRUCTION INC	Active	Inactive	

First Prev Next Last

Save [Undo](#) Delete Insert [Copy](#) Paste [Search](#)

▶ **General Info**

▼ **Headquarters**

Headquarters Account :	<input type="text" value="No"/>	Web Address http:// :	<input type="text"/>
Headquarters Account Code :	<input type="text" value="000000205732"/>	Catalog DUNS :	<input type="text"/>
Headquarters Account Legal Name :	<input type="text" value="WALTERS CONSTRUCTIO"/>	Taxpayer ID Number :	<input type="text" value="550666754"/>
Franchise Account :	<input type="checkbox"/>	Taxpayer ID Number Type :	<input type="text" value="EIN"/> ▼

Interpreting the Search Results You See in VCUST

- The exception would be if the vendor is doing business under another name (such as a DBA with the same FEIN) other than the Legal Name on the Headquarters Account. These remain “Active” or not discontinued.
- Be aware of “Discontinue - No New Business” field
 - Current method for flagging “duplicate” vendor/customer records without “inactivating”

Vendor/Customer	Legal Name	Vendor Active Status	Customer Active Status	Previous Name
00000186768	CENTRIC GROUP LLC	Active	Inactive	
✓ 00000186769	KEEFE SUPPLY COMPANY	Active	Active	
VC0000020227	KEEFE COMMISSARY NETWORK LLC	Inactive	Inactive	
VC0000022443	CRAWFORD SUPPLY COMPANY	Active	Inactive	
VC0000030421	COURTESY PRODUCTS LLC	Active	Inactive	

First Prev Next Last

Save [Undo](#) Delete Insert [Copy](#) Paste [Search](#)

► **General Info**

▼ **Headquarters**

Headquarters Account: Web Address http://:

Headquarters Account Code: Catalog DUNS:

Headquarters Account Legal Name: Taxpayer ID Number:

Franchise Account: Taxpayer ID Number Type:

► **Organization**

▼ **Disbursement Options**

Category:

Description:

Default Type:

Default Priority:

Default Form at:

Default Form at Description:

Scheduled Payment Day:

Single Payment Indicator:

Hold Payment:

Hold Payment Authorized By:

Hold Payment Authorized On:

Hold Reason:

Prevent New Spending:

Prevent New Orders:

Interpreting the Search Results You See in VCUST

- In addition, because some vendor data in wvOASIS originated in the legacy-system era, verify a vendor record by tax ID, not just by Legal Name, in order to determine the FEIN/SS# under which the vendor is currently doing business, so you do not select a vendor account with an outdated FEIN/SS# (under which the vendor was formerly doing business).



Welcome, Mark Totten | Procurement | Budgeting | Accounts Receivable | Accounts Payable

Close

✓ Vendor/Customer

General Info

Headquarters

Organization

Disbursement Options

Deposit/EFT

Remittance Advice

Vendor Terms

Accounts Receivable

eMALL

Location Information

Vendor/Customer

Vendor/Customer	Legal Name	Vendor Active Status	Customer Active Status	Previous Name
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First Prev Next Last

Save Undo Delete Insert Copy Paste Search

General Info

Headquarters

Headquarters Account Code :

Headquarters Account Legal Name :

Franchise Account :

Web Address http:// :

Catalog DUNS :

Taxpayer ID Number :

Taxpayer ID Number Type :

Fingerprinting Your Vendor in a Changing Economy

- Corporate acquisitions becoming more common
- Known vendors often getting purchased by other entities, may invalidate previous tax ID
- From the state's perspective, a previously-registered vendor's acquisition can mean a change in active tax ID
- Verify current entity's active tax ID during your conversation with your apparent successful vendor

What's in a name?

*What's a Vendor? It is not
hand, nor foot,*

*Nor arm, nor face, nor any other
part*

Belonging to a legal entity.

*Except the federal tax
identification number.*

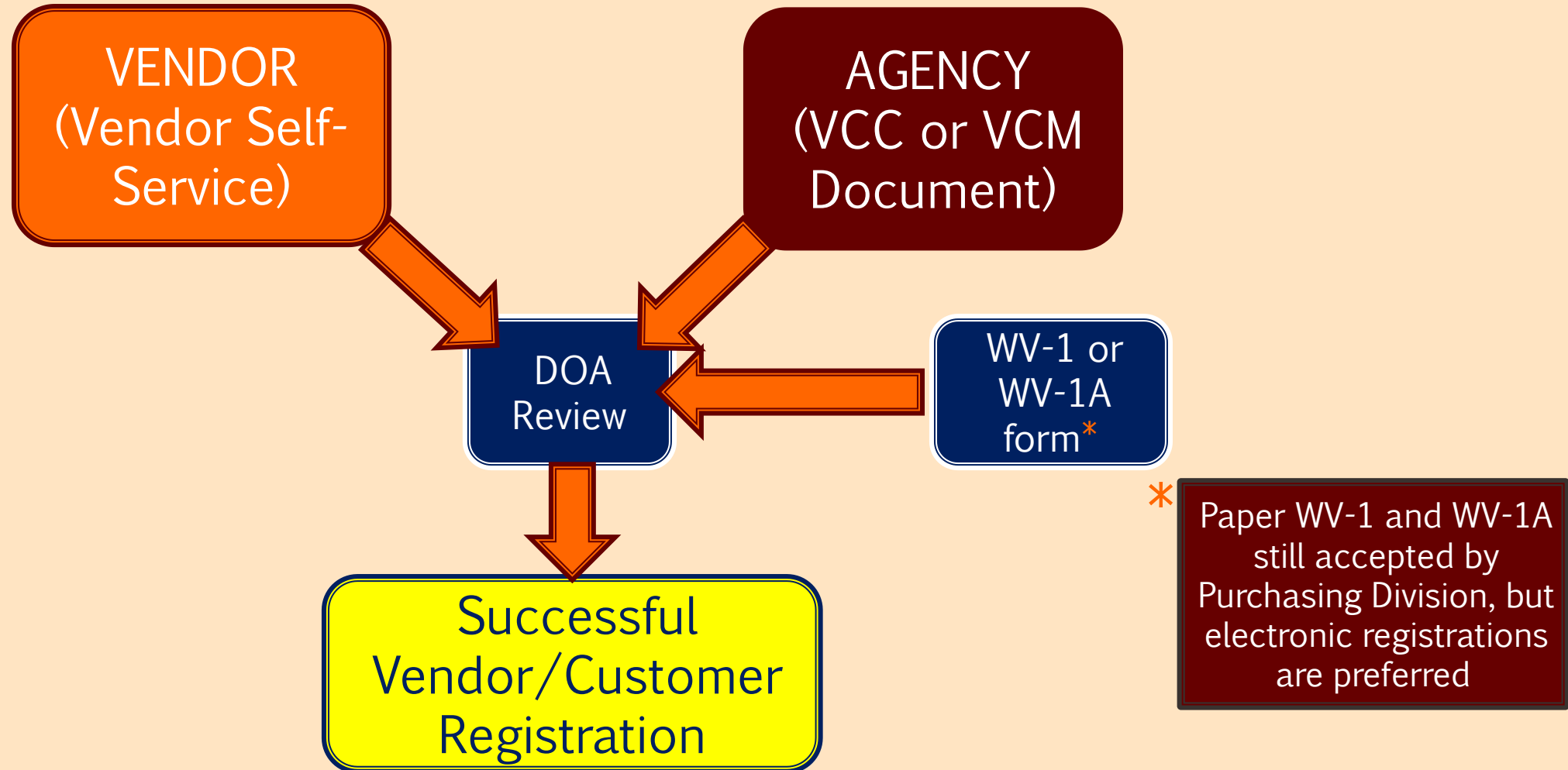
*--Romeo and Juliet, Act II,
Scene II*

Completing a Transaction: Ordering and Payment

- Remit-To/”Hold Payment” with Finance Division

	Order From	Remit To
DOA Agency Responsible	Purchasing Division	<u>Finance Division</u>
Representative field in wvOASIS’s VCUST table under “Disbursement Options”	“Prevent New Orders”	<u>“Hold Payment”</u>

The Registration Process: Two Avenues to Register Online



The Registration Process: Vendor Self-Service

- **Vendor Self-Service (VSS) from vendor's perspective**
 - If unclaimed record exists, vendors can activate the account or, if claimed, contact the account's administrator within their entity
 - If vendor discovers record is "Inactive," there could be several causes.
 - Status may indicate a record with newly-submitted documentation that is at the beginning stages of our system workflow.
 - Vendor may have never submitted W-9 to Finance Division.
 - Vendor may not have been utilized for several years and was set to this status during wvOASIS record "cleanup."

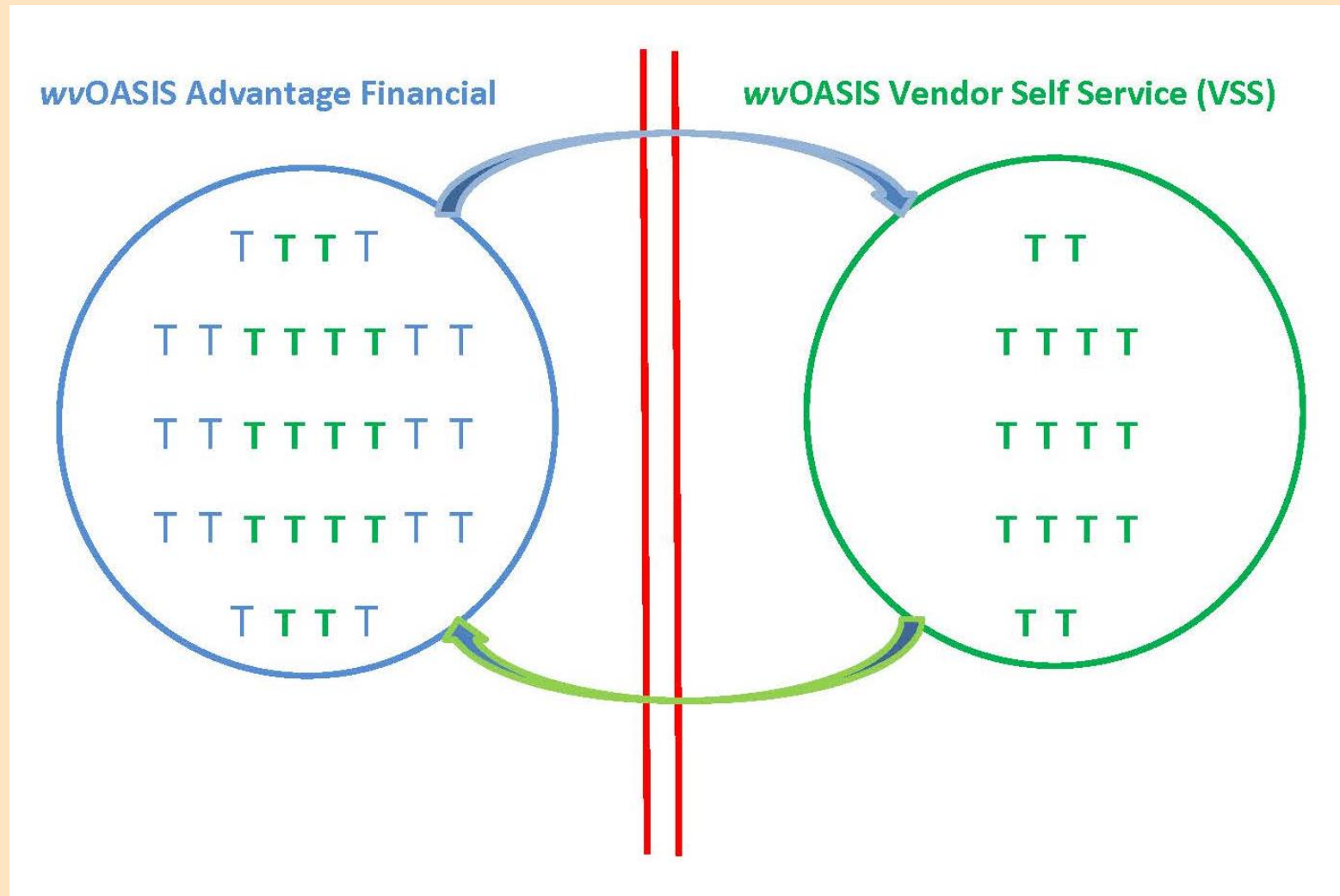
The Registration Process: Vendor Self-Service

- **Vendor Self-Service (VSS) from vendor's perspective**
 - If no account exists for their entity's tax ID, vendors can proceed with the application for registration with Purchasing Division
 - Requires User ID(s) and Password(s) to be created
 - Option to pay vendor registration fee at later date
 - If vendor has technical questions or need assistance with the system, contact myOASIS Help Desk at (304) 558-6708, toll free at (855) 666-8823, or helpdesk@wvOASIS.gov.

The Registration Process: Vendor Self-Service

- If vendor completes registration in Vendor Self-Service
 - New registrations or changes to vendor accounts are submitted and require approval of the state.
 - Once approved, batch jobs are run between the W/OASIS and Vendor Self-Service systems to update the information every hour on the half hour.
 - Vendor payments are not confirmed with the STO until the next business day.
 - When a vendor newly registers through VSS, they should receive an email afterward indicating they have successfully registered. This email does not necessarily mean they are *fully* registered.
 - Difference between creating an account and being “registered.”

The Registration Process: Vendor Self-Service



The Registration Process for Agencies: VCC or VCM Document

- For state agency employees, you can initiate a new Vendor/Customer record *or* modify an existing one:
 - Vendor/Customer Creation (VCC) or Vendor/Customer Maintenance (VCM) document:
- Within VCUST table
 - Scroll to the bottom of the page and click on the “Create New Record” or “Modify Existing Record” link

The screenshot displays a web application interface for Vendor/Customer management. The interface is divided into a sidebar menu on the left and a main content area on the right. The sidebar menu includes options such as 'Close', 'Vendor/Customer', 'General Info', 'Headquarters', 'Organization', 'Disbursement Options', 'Prenote/EFT', 'Remittance Advice', 'Vendor Terms', 'Accounts Receivable', 'eMALL', 'Location Information', 'Fee and Vendor Compliance Holds', 'Change Management', 'Address', 'Business Type', 'Service Area', 'Commodity', 'Authorized Dept.', 'Prevent Spending', 'Prevent Orders', 'Certification', 'Disclosures', and 'Vendor User Information'. The main content area is titled 'Vendor/Customer' and features a table with columns for 'Vendor/Customer', 'Legal Name', 'Vendor Active Status', 'Customer Active Status', and 'Previous Name'. Below the table, there are several expandable sections: 'General Info', 'Headquarters', 'Organization', 'Disbursement Options', 'Prenote/EFT', 'Remittance Advice', 'Vendor Terms', 'Accounts Receivable', 'eMALL', 'Location Information', 'Fee and Vendor Compliance Holds', and 'Change Management'. At the bottom of the page, there are links for 'Top', 'CREATE DOCUMENT > Create New Record Modify Existing Record', 'UPDATE > Headquarters Add 1099 Information Entry Add 1042-S Reporting Information Entry', and 'SEARCH BY > Master Contacts Master Addresses Vendor Commodity Vendor Addresses Vendor Transaction History'. The 'Create New Record' and 'Modify Existing Record' links are circled in red.

The Registration Process for Agencies: VCC or VCM Document

The screenshot shows the wOASIS Document Catalog interface. The left sidebar contains navigation options: Message Center, Search, Document Catalog (highlighted), History, Favorites, and Administration. The main content area is titled 'Document Catalog' and includes a 'Create' dropdown menu. Below it, the 'Document Identifier' section is circled in red and contains the following fields: Code, Unit, Dept., and ID. Below this are sections for 'User Information' and 'Document State'. At the bottom, there are links for 'Browse' and 'Clear', and a table with columns: Code, Dept., Unit, ID, Comments, Version, Function, and Phase. A callout box points to the 'Document Identifier' fields with the text: 'This is best utilized when finding an existing document, but is also a method for creating a document.'

AMS Advantage - Windows Internet Explorer
https://prod-fin.wvoasis.gov/webapp/prdfin11/Advantage

wOASIS
Jump to: VCUST Go Home

Welcome, Samantha Knapp | Procurement | Budgeting | Accounts Receivable | Accounts Payable

wOASIS PROD FIN

- Message Center
- Search
 - Page Search
- Document Catalog**
 - Report Search
- History
- Favorites
- Administration

Document Catalog

Create

Document Identifier

Code : Unit :

Dept. : ID :

User Information

Document State

Browse Clear

Open Validate Submit Copy

Code	Dept.	Unit	ID	Comments	Version	Function	Phase
First	Prev	Next	Last				

Menu

This is best utilized when finding an existing document, but is also a method for creating a document.

Review the VCC Document

- The VCC document is organized into sections that are similar to the VCUST table
- All VCC documents require approval of the State
- Documents in wvOASIS workflow do not immediately go to the Purchasing Division

Review the VCC Document

W/OASIS

Welcome, Samantha Knapp

Jump to: VCUST Go Home Personalize Accessibility App Help About

Procurement Budgeting Accounts Receivable Accounts Payable

Vendor/Customer Creation(VCC) Dept: 0212 ID: 1500003403 Ver.: 1 Function: New Phase: Draft Modified by knappa1, 08/21/2014

Document Navigator

- Header
- Vendor/Customer
- Address
- Customer Account
- 1099 Reporting Information
- 1042-S Reporting Information
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Prevent Orders
- Certification
- Disclosures

Header

List View

General Information Extended Description Document Information

Document Name: [Text Field]

Record Date: [Text Field] [Calendar Icon]

Document Description: [Text Field]

Never Archive:

Save Undo

Copy Validate Submit Discard

Print Processing Workflow File Close

- If there is an attachment to be included, please add it while still in the “Header” portion.
- VCC Doc ID # must be included on WV-1A and the agency must either include a W-9 or indicate (on the form) that a W-9 has been sent to Finance Division.

“Save” should be selected after completing info under each tab.

Review the VCC Document

The screenshot shows the W/OASIS Vendor/Customer Creation (VCC) form. The top navigation bar includes the W/OASIS logo, a 'Jump to' field with 'VCUST', and links for Home, Personalize, Accessibility, App Help, and About. Below this is a breadcrumb trail: Procurement > Budgeting > Accounts Receivable > Accounts Payable. The main header displays 'Vendor/Customer Creation(VCC)' with details: Dept: 0212, ID: 1500003403, Ver.: 1, Function: New, Phase: Draft, and Modified by knappsa1 on 08/21/2014. A 'Document Navigator' on the left lists sections like Header, Vendor/Customer, Address, Customer Account, and Reporting Information. The main form area has tabs for 'General Information', 'Headquarters', 'Account Indicators', 'Organization', 'Disbursement Options', 'Prenote/EFT', 'Remittance Advice', 'Vendor Terms', and 'A...'. The 'General Information' tab is active, showing fields for Vendor/Customer, Auto Generate, Legal Name, Alias/DBA, Location Name, Department, Unit, and Previous Name. To the right, there are fields for Organization Type, First Name, Middle Name, Last Name, Company Name, and Active From. Several callout boxes provide instructions: 'Click "Auto Generate" to populate Vendor/Customer #' points to the 'Auto Generate' checkbox; 'Must choose "Company" or "Individual."' points to the 'Organization Type' dropdown; 'Required only if a "Sole Proprietor"; the vendor's name is in this field while their company name is in the "Company Name" field.' points to the 'Legal Name' field; 'Required if "Individual."' points to the 'First Name', 'Middle Name', and 'Last Name' fields; 'Required if not "Individual."' points to the 'Company Name' field; and 'Required by the system' points to the 'Active From' field. A 'Save' button is highlighted with a callout: '"Save" should be selected after completing info under each tab.' The bottom of the form features a toolbar with buttons for Save, Undo, Insert New Line, Edit with Grid, Copy, Validate, Submit, Discard, Print, Processing, Workflow, File, and Close.

W/OASIS

Welcome, Samantha Knapp

Jump to: VCUST Go Home Personalize Accessibility App Help About

Procurement Budgeting Accounts Receivable Accounts Payable

Vendor/Customer Creation(VCC) Dept: 0212 ID: 1500003403 Ver.: 1 Function: New Phase: Draft Modified by knappsa1 , 08/21/2014

Document Navigator

Header

Vendor/Customer

Address

Customer Account

1099 Reporting Information

1042-S Reporting Information

Business Type

Service Area

Commodity

Authorized Dept.

Prevent Spending

Prevent Orders

Certification

Disclosures

Vendor/Customer Vendor/Customer: Legal Name:

Vendor/Customer Legal Name Active From

From 1 to 1 Total: 1 First Previous Next Last Go to line: Go

List View

General Information Headquarters Account Indicators Organization Disbursement Options Prenote/EFT Remittance Advice Vendor Terms A

Location Information Fee and Vendor Compliance Holds

Vendor/Customer: Auto Generate: Legal Name: Alias/DBA: Location Name: Department: Unit: Previous Name:

Organization Type: First Name: Middle Name: Last Name: Company Name: Active From:

Must choose "Company" or "Individual."

Click "Auto Generate" to populate Vendor/Customer #

Required only if a "Sole Proprietor"; the vendor's name is in this field while their company name is in the "Company Name" field.

Required if "Individual."

Required if not "Individual."

Required by the system

"Save" should be selected after completing info under each tab.

Save Undo Insert New Line Edit with Grid

Copy Validate Submit Discard

Print Processing Workflow File Close

Review the VCC Document

The screenshot shows the MOASIS Vendor/Customer Creation (VCC) form, specifically the Organization tab. The form is titled "Vendor/Customer" and includes a header with "Vendor/Customer" and "Legal Name". The Organization tab is active, showing various fields for tax and identification information. Two red boxes with the word "Required" are placed over the "1099 Classification" and "Taxpayer ID Number" fields. A third red box with the text "Save should be selected after completing info under each tab." has an arrow pointing to the "Save" button in the bottom toolbar. The bottom toolbar also includes buttons for "Undo", "Insert New Line", "Edit with Grid", "Copy", "Validate", "Submit", "Discard", "Print", "Processing", "Workflow", "File", and "Close".

MOASIS

Welcome, Samantha Knapp

Procurement | Budgeting | Accounts Receivable | Accounts Payable

Vendor/Customer Creation(VCC) Dept: 0212 ID: 150003403 Ver.: 1 Function: New Phase: Draft Modified by knapps1, 08/29/2014

Document Navigator

- Header
- Vendor/Customer
- Address
- Customer Account
- 1099 Reporting Information
- 1042-S Reporting Information
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Prevent Orders
- Certification
- Disclosures

Vendor/Customer: Legal Name:

Vendor/Customer	Legal Name	Active From
From 1 to 1 Total: 1		

General Information | Headquarters | Account Indicators | **Organization** | Disbursement Or | Vendor Terms | Accounts Receivable | eMALL | Location Information | Fee and Vendor Compliance Holds

1099 Classification: **Required**

1042-S Recipient Code:

Number of Employees:

Merchant ID:

Sex:

Date of Birth:

Marital Status:

Annual Income:

Create Taxpayer ID:

Re-Enter Taxpayer ID:

IRS Country of Residence:

IRS Country Sub Code:

Contract Withholding Exempt:

Taxpayer ID Number: **Required**

Taxpayer ID Number Type:

Detailed TIN Type:

Foreign Tax ID:

1042-S Recipient Account Number:

W-8 Form:

Tax Profile:

Tax Profile Name:

EBIC Number:

IAEC Number:

Web Address http://:

Supplier Shared Secret:

Save Undo Insert New Line Edit with Grid

Copy Validate Submit Discard Print Processing Workflow File Close

Disclosure of Information on a Registration

- Agencies must check under the “Disclosures” tab if the vendor is classified* as anything other than “Individual;” if information is incomplete, the vendor must add bank-reference information and at least two owners/officers (only one if vendor is “Sole Proprietor”) under the “Disclosures” tab through VSS. The vendor must provide this information along with the vendor registration fee in order for workflow to begin on the state-agency-review process, after which, the “Prevent New Orders” hold would be removed in VCUST.
 - *“Classification” is indicated in the “1099 Classification” field under the “Organization” tab.

The screenshot displays the W/OASIS Vendor/Customer Creation (VCC) interface. The top navigation bar includes the W/OASIS logo, a welcome message for Mark Totten, and system metadata: Dept: 0212, ID: 1800001483, Ver.: 1, Function: New, Phase: Draft, and Modified by. The left sidebar contains a Document Navigator with tabs for Header, Vendor/Customer (selected), Address, Customer Account, 1099 Reporting Information, 1042-S Reporting Information, Business Type, Service Area, Commodity, Authorized Dept., Prevent Spending, Prevent Orders, Certification, and Disclosures. The main content area shows the Vendor/Customer details, including a list of records (From 1 to 1 Total: 1) and a set of tabs: General Information, Headquarters, Account Indicators, Organization (selected), Disbursement Options, Fee and Vendor Compliance Holds, and Travel. The Organization tab is active, displaying fields for 1099 Classification, 1042-S Recipient Code, Number of Employees, Merchant ID, Sex, Date of Birth, Marital Status, Annual Income, Create Taxpayer ID, Re-Enter Taxpayer ID, IRS Country of Residence, IRS Country Sub Code, and Contract Withholding Exempt. A dropdown menu is open for the 1099 Classification field, listing options: Individual, Sole Proprietor, Partnership, Corporation, Trust, Government, Non-Profit, Employee, Estate, Board Member, Medical Corporation, Attorney Corporation, Payroll, and PCard. The bottom of the form features a toolbar with buttons for Save, Undo, Insert New Line, Edit with Grid, Copy, Validate, Submit, and Discard.

Review the VCC Document

The screenshot shows the MOASIS Vendor/Customer Creation (VCC) form. The header includes the MOASIS logo, user information (Welcome, Samantha Knapp), and navigation links (Procurement, Budgeting, Accounts Receivable, Accounts Payable). The breadcrumb trail shows: Vendor/Customer Creation(VCC) | Dept: 0212 | ID: 1500003403 | Ver.: 1 | Function: New | Phase: Draft | Modified by: knappa1, 08/29/2014.

The left sidebar contains a Document Navigator with the following items: Header, Vendor/Customer (highlighted), Address, Customer Account, 1099 Reporting Information, 1042-S Reporting Information, Business Type, Service Area, Commodity, Authorized Dept., Prevent Spending, Prevent Orders, Certification, and Disclosures.

The main form area is titled "Vendor/Customer" and "Vendor/Customer: Legal Name:". It features a table with columns: Vendor/Customer, Legal Name, and Active From. Below the table are navigation buttons (First, Previous, Next, Last) and a "Go to line:" field.

The form is divided into several tabs: General Information, Headquarters, Account Indicators, Organization, Disbursement Options, Reports/FFY, Distance Advice, Vendor Terms, Accounts Receivable, eMALL, Location Information, and Fee and Vendor Compliance Holds. The "General Information" tab is active.

Key fields and annotations in the "General Information" tab include:

- Category:** A dropdown menu with an annotation box stating "Must be 'DIRC'".
- Description:** A text input field.
- Default Type:** Set to "Check".
- Default Priority:** Set to "99".
- Default Format:** Set to "REG".
- Default Format Description:** Set to "Regular Payment".
- Scheduled Payment Day:** A text input field.
- Single Payment Indicator:** A checkbox.
- Name on Check:** A dropdown menu with an annotation box stating "Must be Legal Name".
- Hold Payment:** A checkbox.
- Hold Payment Authorized By:** A dropdown menu.
- Hold Reason:** A text area.
- Prevent New Spending:** A dropdown menu.
- Prevent New Orders:** A dropdown menu set to "For All Departments".
- Third Party Code:** A dropdown menu.
- Third Party Name:** A text input field.
- Third Party Approved By:** A dropdown menu.
- Third Party Reason:** A text area.
- Always Infer Third Party Vendor:** A checkbox.
- Third Party Address ID:** A dropdown menu.

Three large red annotation boxes provide additional instructions:

- Bottom left: "Save" should be selected after completing info under each tab. (An arrow points to the "Save" button in the footer.)
- Bottom right: This should *not* be changed—remains on "Prevent New Orders" hold until after review of registration by Purchasing Division. (An arrow points to the "Prevent New Orders" dropdown.)
- Center: Must be "DIRC" (points to the "Category" dropdown).
- Center: Must be Legal Name (points to the "Name on Check" dropdown).

The footer contains a toolbar with buttons: Save, Undo, Insert New Line, Edit with Grid, Copy, Validate, Submit, Discard, Print, Processing, Workflow, File, and Close.

Review the VCC Document

W O A S I S

Welcome, Mark Totten

Jump to: VCUST Home

Procurement | Budgeting | Accounts Receivable | Accounts Payable

Vendor/Customer Creation(VCC) Dept: 0212 ID: 1600013894 Ver.: 1 Function: New Phase: Draft Modified by tottenma1, 03/29/2016

Document Navigator

- Header
- Vendor/Customer
- Address
- Customer Account
- 1099 Reporting Information
- 1042-S Reporting Information
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Prevent Orders
- Certification
- Disclosures

Vendor/Customer Vendor/Customer: Legal Name:

Vendor/Customer	Legal Name	Active From
From 1 to 1 Total: 1		

General Information | Headquarters | Account Indicators | Organization | Disbursement Options | Prenote/EFT | Remittance Advice | Vendor Terms | Accounts Receivable | eMALL | **Location Information**

Fee and Vendor Compliance Holds | Travel

Verify My Locations by: Use My TIN Number

Vendor Verification Password:

Confirm Verification:

Select "Use My TIN Number"

"TIN Number" could also be SS#

Save | Undo | Insert New Line | Edit with Grid

Copy | Validate | Submit | Discard

Print | Processing | Workflow | File | Close

Review the VCC Document

The screenshot shows the W/OASIS Vendor/Customer Creation (VCC) document interface. The top navigation bar includes the W/OASIS logo, a 'Jump to' field with 'VCUST' entered, and links for Home, Personalize, Accessibility, App Help, and About. The main header displays 'Welcome, Mark Totten' and navigation tabs for Procurement, Budgeting, Accounts Receivable, and Accounts Payable. The document title is 'Vendor/Customer Creation(VCC)' with details: Dept: 0212, ID: 1700015652, Ver.: 1, Function: New, Phase: Draft, and Modified by: tottenma1, 06/06/2017.

The left sidebar contains a 'Document Navigator' with a list of tabs: Header, Vendor/Customer (selected), Address, Customer Account, 1099 Reporting Information, 1042-S Reporting Information, Business Type, Service Area, Commodity, Authorized Dept., Prevent Spending, Prevent Orders, Certification, and Disclosures.

The main content area is titled 'Vendor/Customer' and shows a table with one entry. A callout box states: "Fee Exempt" field removed spring 2017. Below the table are navigation buttons: First, Previous, Next, Last. A 'Go to line:' field with a 'Go' button is also present. A 'List View' button is located on the right.

Below the table are several tabs: General Information, Headquarters, Account Indicators, Organization, Disbursement Options, Prenote/EFT, Remittance Advice, Vendor Terms, Accounts Receivable, eMALL, and Location Information. The 'Fee and Vendor Compliance Holds' tab is active, showing a sub-tab for 'Travel'.

Under the 'Travel' sub-tab, there are several date-related fields: Registration Application Date, Registration Effective Date, Registration Expiration Date, and Pre-Registration Code. A callout box states: Purchasing Division will complete date-related information if payment and disclosure info is confirmed. Vendor's registration period starts from payment date.

On the right side of the 'Travel' sub-tab, there are several checkboxes: Tax Clearance, Unemployment Insurance, Worker's Compensation, Secretary of State Registration, and Federal Debarred.

At the bottom of the interface, there is a toolbar with buttons: Save, Undo, Insert New Line, Edit with Grid, Copy, Validate, Submit, Discard, Print, Processing, Workflow, File, and Close. A callout box points to the 'Save' button, stating: "Save" should be selected after completing info under each tab.

Review the VCC Document

MOASIS

Welcome, Samantha Knapp

Procurement Budgeting Accounts Receivable Accounts Payable

Vendor/Customer Creation(VCC) Dept: 0212 ID: 1500003403 Ver.: 1 Function: New Phase: Draft Modified by knapps1, 08/29/2014

Document Navigator

- Header
- Vendor/Customer
- Address**
- Customer Account
- 1099 Reporting Information
- 1042-S Reporting Information
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Prevent Orders
- Certification
- Disclosures

Address Total Lines: 1 Address ID: Address Type:

Address ID	Address Type	Street 1	City	State/Province	Zip/Postal Code	Additional Address Info.
From 1 to 1 Total: 1						

Go to line: [] Go

List View

General Information Address Information Prenote/EFT Remittance Advice Contact Information Contact Address Information

Vendor/Customer: [] Active From: []

Address Type: [] **Ordering & Payment** Active To: []

Division/Department: []

Additional Address Info.: []

Prevent New Spending: []

Default Currency: [] **USD (\$)** Default Record: []

Mail Returned: []

Business Address Validation: []

Save Undo Insert New Line Insert Copied Line Edit with Grid

Copy Validate Sup Insert New Line

Print Processing Workflow File Close

“Save” should be selected after completing info under each tab.

Select before “Ordering” address and before “Payment” address is input.

Review the VCC Document

MOASIS | Welcome, Mark Totten | Procurement | Budgeting | Accounts Receivable | Accounts Payable | Jump to: [] Go | Home | Personalize | Accessibility | App Help | About

Vendor/Customer Creation(VCC) | Dept: 0212 | ID: 1900002271 | Ver.: 1 | Function: New | Phase: Draft | Modified by tottenma1, 08/31/2018

Document Navigator

- Header
- Vendor/Customer
- Address**
- Customer Account
- 1099 Reporting Information
- 1042-S Reporting Information
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Prevent Orders
- Certification
- Disclosures

Address | Total Lines: 0 | Address ID: none | Address Type: none

Address ID	Address Type	Street 1	City	State/Province	Zip/Postal Code	Additional Address Info.
From 0 to 0 Total: 0						

General Information | Address Information | Prenote/EFT | Remittance Advice | **Contact Information** | Contact Address Information

Principal Contact ID: [] **Click "Auto Generate"**

Auto Generate:

Principal Contact: [] **Person's Name**

English Spoken:

Correspondence Type: [v] **Select "Email"**

Valid Vendor Email Address

Email: []

Phone: [] **Can enter the Principal Contact's line and a main line for the business.**

Phone Extension: []

Alternate Phone: []

Alternate Phone Extension: []

Fax: []

Fax Extension: []

Alternate Fax: []

Alternate Fax Extension: []

Buttons: Edit | Copy | Validate | Submit | Discard | Print | Processing | Workflow | File | Close

Review the VCC Document

The screenshot shows the WOASIS Vendor/Customer Creation (VCC) form. The header includes the WOASIS logo, user name (Samantha Knapp), and navigation links. The main form area is titled "Business Type" and shows a table with one row: Business Type ID: SMAL, Business Type: Small Business. Below the table are fields for Vendor/Customer, Business Type ID (SMAL), Business Type (Small Business), Certification Number, Certification Start Date, Certification End Date, SWAM Type, Status, and Initiation Date. Annotations highlight the Business Type ID field as "Business Type Required", the Certification Start and End Date fields as "Two-year certification", and the Initiation Date field as "Current Date". A note points to the Status field, stating "Enter as 'Requested,' Purchasing Division will change to 'Accepted' if approved." The bottom of the form has a toolbar with buttons for Save, Undo, Insert New Line, Insert Copied Line, Edit with Grid, Copy, Validate, Submit, Discard, Print, Processing, Workflow, File, and Close.

Business Type Required

Two-year certification

Current Date

Enter as "Requested," Purchasing Division will change to "Accepted" if approved.

"Save" should be selected after completing info under each tab.

Review the VCC Document

The screenshot shows the WOASIS Vendor/Customer Creation (VCC) form. The header includes the WOASIS logo, user name (Samantha Knapp), and navigation tabs (Procurement, Budgeting, Accounts Receivable, Accounts Payable). The main form area is titled "Vendor/Customer Creation(VCC)" and includes fields for Dept (0212), ID (1500003403), Ver. (1), Function (New), and Phase (Draft). The "Certification" section is highlighted, showing a table with columns for "Legal Name" and "Vendor Active Status". The table contains one row with "Inactive" in the "Vendor Active Status" column. Below the table, there are fields for "Vendor/Customer:" and "Certification Status". The "Certification Status" section includes dropdown menus for "Vendor Active Status" (set to "Active"), "Vendor Approval Status" (set to "Complete"), "Customer Active Status" (set to "Inactive"), and "Customer Approval Status" (set to "Incomplete"). Two red boxes labeled "Required" are placed over the "Vendor Active Status" and "Customer Active Status" dropdowns. A red box with text "Active or Inactive status based on whether you are entering entity as a vendor, as a customer, or as both" has arrows pointing to the "Vendor Active Status" and "Customer Active Status" dropdowns. At the bottom of the form, there is a toolbar with buttons for "Save", "Undo", "Insert New Line", "Insert Copied Line", "Edit with Grid", "Copy", "Validate", "Submit", "Discard", "Print", "Processing", "Workflow", "File", and "Close". A red box with text "Save should be selected after completing info under each tab." has an arrow pointing to the "Save" button. Another red box with text "Select first" has an arrow pointing to the "Insert New Line" button.

“Active” or “Inactive” status based on whether you are entering entity as a vendor, as a customer, or as both

Required

Required

“Save” should be selected after completing info under each tab.

Select first

Review the VCC Document

WOASIS

Welcome, Samantha Knapp

Procurement | Budgeting | Accounts Receivable | Accounts Payable

Vendor/Customer Creation(VCC) Dept: 0212 ID: 1500003403 Ver.: 1 Function: New Phase: Draft Modified by knapps1 , 08/29/2014

Document Navigator

- Header
- Vendor/Customer
- Address
- Customer Account
- 1099 Reporting Information
- 1042-S Reporting Information
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Prevent Orders
- Certification
- Disclosures**

Disclosure Type	Name	Title	City	State/Province
From 1 to 1 Total: 1				

Vendor/Customer:

Disclosures

Disclosure Type:

Name:

Title:

City:

State/Province:

Phone:

“Title” not required when inputting “Bank Info.”

System requires phone number.

“Save” should be selected after completing info under each tab.

Select first

Save | Undo | Insert New Line | Insert Copied Line | Edit with Grid

Copy | Validate | Submit | Discard

Print | Processing | Workflow | File | Close

The VCM Document

- The VCM is used to modify an existing Vendor/Customer record
- Each VCM page contains virtually the same components as the VCC document and VCUST table
 - Enables the user to find the appropriate fields for data entry more readily
- Primary difference between VCC and VCM is the “Line Action” field

Review the VCM Document

WOASIS

Welcome, Samantha Knapp

Vendor/Customer Modification(VCM) Dept: 0212 ID: 1500005202 Ver.: 1 Function: New Phase: Draft

Document Navigator

- Header
- Headquarters
- Vendor/Customer
- 1099 Reporting Information
- 1042-S Reporting Information
- Master Address
- Address Information**
- Customer Account
- Contacts
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Certification
- Prevent Orders
- Disclosures

Address Information Total Lines: 1 Line Action: Address

Line Action	Address ID	Address Type
From 1 to 1 Total: 1		

Line Action:

Vendor/Customer:

Bypass Address Validation:

Add New Address Modify Existing Address Address Information Other Address

New Address Type:

- A vendor or agency may request adding an “Ordering” address through VSS or a VCM without having to provide back-up documentation for Purchasing.
- If the agency adds a “Payment” address, they must have back-up documentation from the vendor, which needs to be forwarded to the Finance Division, as they will be approving/rejecting the VCM document related to remit-to addresses.
- The vendor is not to change a “Payment” address without forwarding back-up documentation to Finance Division, otherwise, Finance will reject this VSS-generated VCM.

Review the VCM Document

W/OASIS

Welcome, Mark Totten

Procurement | Budgeting | Accounts Receivable | Accounts Payable

View All 1 of 1 | Approve action completed.

Vendor/Customer Modification(VCM) Dept: 0212 ID: 1400000077 Ver.: 1 Function: New Phase: Final Modified by montantezga1 , 07/09/2014

Document Navigator

- Header
- Headquarters
- Vendor/Customer
- 1099 Reporting Information
- 1042-S Reporting Information
- Master Address
- Address Information
- Customer Account
- Contacts
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Certification
- Prevent Orders
- Disclosures

Header

List View

General Information | Legal Name Change | Extended Description | Document Information | Rejection Reasons

Vendor/Customer: 000000199084

Legal Name: JEO ENTERPRISES INC

Headquarters Code: 000000199084
JEO ENTERPRISES INC

Document Name:

Record Date: 07/09/2014

Document Description: TEAM Renewal 06/12/14
Ckt#5342 Memo#75

Tracking Number:

Prefix:

VSS-Initiated:

Changes Rejected:

Never Archive:

Attachments

Archive
SendPage
Download Document
Attachments

Edit | Copy | Copy Forward | Discard | Print | Processing | Workflow | File | Close

- Backup documentation for vendor address additions can be added as an attachment in the Header.

Transactional Exemption Process


- VNREGEX table in *W*OASIS
- \$2,500 threshold related to \$125 vendor registration fee
- Vendor registration fee exemption for specific transactions


Vendor Registration Exemption

<u>Department</u>	<u>Unit</u>	<u>Vendor Registration Exemption Code</u>	<u>Vendor Registration Exemption Description</u>
0213	0213PC		CSR 148-1-6 Pcard Less Than \$25,000
✓ 0213	0213SMALL		CSR 148-1-6.c.3 PO Less Than \$2,500.01

First Prev Next Last

Save [Undo](#) Delete Insert [Copy](#) Paste [Search](#)

*Department : 

Unit : 

*Vendor Registration Exemption Code :

Vendor Registration Exemption Description :

Transactional Exemption Process

- Additional handbook-related transactional exemption codes to vendor registration deployed to all Departments in 2016
- Code usage reviewed by Purchasing Division Inspection Unit; letters sent to agencies

Vendor Registration Exemption

<u>Department</u>	<u>Unit</u>	<u>Vendor Registration Exemption Code</u>	<u>Vendor Registration Exemption Description</u>
✓ 0213		0213ADVERTISING	Advertising pursuant to the Purchasing Procedures Handbook Section 9.1 at WVPurchasing.gov
0213		0213ATTORNEY	Attorneys and law firms pursuant to the Purchasing Procedures Handbook Section 9.3 at WVPurchasing.gov
0213		0213AVIATIONFUEL	Aviation fuel pursuant to the Purchasing Procedures Handbook Section 9.4 at WVPurchasing.gov
0213		0213COURTORDER	Court-ordered payments pursuant to the Purchasing Procedures Handbook Section 9.20 at WVPurchasing.gov
0213		0213COURTPLACEMENT	Court-ordered placements pursuant to the Purchasing Procedures Handbook Section 9.6 at WVPurchasing.gov
0213		0213DUES	Professional association dues pursuant to the Purchasing Procedures Handbook Section 9.12 at WVPurchasing.gov
0213		0213EMERGENCYSVCS	Emergency services, non-construction, non-architectural, non-engineering pursuant to the Purchasing Procedures Handbook Section 9.11 at WVPurchasing.gov
0213		0213ENTERTAINER	Entertainers pursuant to the Purchasing Procedures Handbook Section 9.7 at WVPurchasing.gov
0213		0213HISTORICAL	Artwork and historical items pursuant to the Purchasing Procedures Handbook Section 9.2 at WVPurchasing.gov
0213		0213HOSPITALITY	Hospitality pursuant to the Purchasing Procedures Handbook Section 9.8 at WVPurchasing.gov

Transactional Exemption Process

- Code input into the “Vendor Registration Exemption” field within the Header portion of the *WOASIS* award document under the General Information tab

The screenshot displays the WOASIS system interface. At the top, the WOASIS logo is on the left, and navigation links for 'Jump to: PRCUID', 'Go', 'Home', and 'Personalize' are on the right. Below the logo, a welcome message 'Welcome, Mark Totten' is shown, along with navigation tabs for 'Procurement', 'Budgeting', 'Accounts Receivable', and 'Accounts Payable'. A yellow banner indicates 'View All 1 of 4 | ⚠ This is an inventory commodity. (A2649)'. The main header bar shows 'Agency Delivery Order(ADO) Dept: 0213 ID: PUR160000008 Ver.: 1 Function: New Phase: Final Modified by watkinsde , 10/26/2015'. The 'Header 1' section is active, and the 'General Information' tab is selected. The form fields are as follows:

Document Name:	Purchasing Division Bldg. 15 desktop PC order Fall 2015	PCard ID:	
Record Date:	10/26/2015	PCard Exp:	
Budget FY:	2016	Accounting Profile:	
Fiscal Year:	2016	Procurement Folder:	151742
Period:	4	Procurement Type:	Agency Delivery Order
Document Description:	Purchasing Division Bldg. 15 desktop PC order, Fall 2015	Procurement Type ID:	12
Actual Amount:	\$4,040.00	Vendor Registration Exemption:	
Closed Amount:	\$4,040.00	Cited Authority:	
Closed Date:	12/10/2015	Confirmation Order:	<input type="checkbox"/>
		Blanket Agreement:	<input type="checkbox"/>

A red box highlights the 'Vendor Registration Exemption' field, with a callout box containing the text 'Transactional Code from VNREGEX'.

The Registration Process: WV-1 Form

- Used to register vendors who want to participate in the competitive bid process and receive orders from state agencies
 - This form requires the \$125 fee
- Fee may be paid over the telephone via credit card
- Vendors are to mail all WV-1 forms and payment directly to the Purchasing Division
- New WV-1 effective 6/10/2021

WV-1 New Update
REV. 06/10/2021

STATE OF WEST VIRGINIA - PURCHASING DIVISION

**VENDOR REGISTRATION AND DISCLOSURE STATEMENT
AND SMALL, WOMEN-, AND MINORITY-OWNED BUSINESS
CERTIFICATION APPLICATION**

Before a vendor is eligible to sell goods and/or services to the State of West Virginia, the *West Virginia Code* §5A-3-12 requires all vendors to have on file with the West Virginia Purchasing Division a completed Vendor Registration and Disclosure Statement. All vendors wishing to participate in the competitive bid process and receive purchase orders from the State of West Virginia exceeding \$2,500 in aggregate across all state agencies are required to complete the Vendor Registration and Disclosure Statement (WV-1 form) and pay a **\$125.00** annual fee. Payment of the annual fee includes email notifications on bid opportunities based on the commodities and services selected upon registering in the Vendor Self-Service (VSS) portal at wvOASIS.gov. Please complete this form in its **ENTIRETY** and return it with a check or money order made payable to the **STATE OF WEST VIRGINIA** in the amount of **\$125.00**. Incomplete forms will not be processed and will be returned to the vendor. Please send completed form and payment to:

**Purchasing Division - Vendor Registration
2019 Washington Street East
Charleston, WV 25305-0130**

Whenever a change occurs in the information submitted, such change shall be reported immediately in the same manner as required in the original disclosure statement (*West Virginia Code* §5A-3-12). Vendors doing business with the State of West Virginia are expected to abide by the **Vendor Code of Conduct** available online at www.state.wv.us/admin/purchase/vrc/vendorconduct.pdf.

Privacy Notice: The Purchasing Division is required to collect certain information as stated in *West Virginia Code* §5A-3-12, other applicable sections of the *West Virginia Code*, the Vendor Registration and Disclosure Statement forms, and other documents to facilitate the state bidding and contract administration processes. This information is stored in a secure environment, but unless specifically protected under state law, any information provided may be inspected by or disclosed to the public.

Vendors are also required to 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 other state agencies or political subdivisions. Failure to do so may result in delay of or disqualification from a contract award pursuant to *West Virginia Code of State Rules* §148-1-6.1.7.

Should you need additional information relating to vendor registration, please visit www.state.wv.us/admin/purchase/VendorReg.html. Questions concerning this Vendor Registration and Disclosure Statement may be directed to the Purchasing Division at (304) 558-2311.

WV-1 - Revised 06/10/2021 Page 1

The Registration Process: WV-1A Form

WV-1A
REV. 06/10/2021

New Update

STATE OF WEST VIRGINIA - PURCHASING DIVISION

VENDOR REGISTRATION AND DISCLOSURE STATEMENT AND SMALL, WOMEN-, AND MINORITY-OWNED BUSINESS CERTIFICATION APPLICATION

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STATE AGENCY:

ADDRESS:

CITY, STATE, ZIP:

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Questions concerning this Vendor Registration and Disclosure Statement may be directed to the Purchasing Division at (304) 558-2311. Should you need additional information relating to vendor registration, please visit www.state.wv.us/admin/purchase/VendorReg.html.

- Used to register sole-source vendors
- Also used to register vendors selling competitive goods or services \$2,500 or less per year
- Vendor can complete and later create VSS login after VCUST entry
- No fee is required
- Part I – vendor completes
- Part II – agency completes and agency's procurement officer signs

The Registration Process: WV-1A Form

- WV-1A form can also be used by a vendor needing to submit information missing from original registration or through their VSS registration.
- Include *W*OASIS Doc ID # on WV-1A if a corresponding electronic document exists. Also, the agency must either include a W-9 or indicate (on the form) that a W-9 has been sent to Finance Division.
- New WV-1A effective 6/10/2021.

WV-1A
REV. 06/10/2021 New Update

STATE OF WEST VIRGINIA - PURCHASING DIVISION

**VENDOR REGISTRATION AND DISCLOSURE STATEMENT
AND SMALL, WOMEN-, AND MINORITY-OWNED BUSINESS
CERTIFICATION APPLICATION**

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STATE AGENCY:

ADDRESS:

CITY, STATE, ZIP:

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Privacy Notice: The Purchasing Division is required to collect certain information as stated in *West Virginia Code* §5A-3-12, other applicable sections of the *West Virginia Code*, the Vendor Registration and Disclosure Statement forms, and other documents to facilitate the state bidding and contract administration processes. This information is stored in a secure environment, but unless specifically protected under state law, any information provided may be inspected by or disclosed to the public.

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Questions concerning this Vendor Registration and Disclosure Statement may be directed to the Purchasing Division at (304) 558-2311. Should you need additional information relating to vendor registration, please visit www.state.wv.us/admin/purchase/VendorReg.html.

WV-1A - Revised 06/10/2021 Page 1

SWAM Certification

- The West Virginia Purchasing Division incorporated the Small, Women-, and Minority-Owned Businesses (SWAM) Certification Application as part of the vendor registration process
 - May be applied for through Vendor Self-Service registration or using the WV-1 or WV-1A
- Created by *West Virginia Code* §5A-3-59
- CSR §148-2-1 et seq. requires vendors to re-certify every two years in order to continue compliance

SWAM Certification Check

- How to check a vendor's SWAM status in *W*OASIS
 - “Jump to” VCUST table
 - Search and select appropriate vendor/customer record
 - On the Document Navigator, click on the Business Type section within the vendor/customer (VCUST) record

SWAM Certification Check

Welcome, Mark Totten | Procurement

Vendor/Customer

Business Type

<u>Business Type ID</u>	Business Type	Certification Start Date	Certification End Date
✓ SMAL	Small Business	06/11/2015	06/11/2017

First Prev Next Last

Save [Undo](#) Delete Insert [Copy](#) Paste

Vendor/Customer : VC0000021753
FLYING SQUIRREL RANCH & FARM

Business Type ID : SMAL

Business Type : Small Business

Certification No :

Certification Start Date : 06/11/2015

Certification End Date : 06/11/2017

SWAM Type :

Status : Accepted

Initiation Date : 6/11/15

SWAM Vendors

- Purchasing Division's Vendor Registration web page features information on SWAM Certification
 - www.state.wv.us/admin/purchase/VendorReg.html
 - Also includes Current SWAM Vendor List for State of West Virginia
- Agencies can consult SWAM Vendor List PDF
 - Updated every business day with data from *WV*OASIS
 - Searchable by CTRL+F shortcut
- Non-resident SWAM vendors part of Vendor Preference Certificate (for appropriate commodities)
- At end of each FY, agencies must submit a SWAM report to the Purchasing Division
 - Excel template downloadable from <http://intranet.state.wv.us/admin/purchase/procedures.html>
 - Agency-accessible reports also available in Business Intelligence
 - WV-FIN-PROC-039 does not include Purchasing Card transactions to SWAM-Certified vendors
 - WV-FIN-AP-061 includes Purchasing Card and GAX transactions to SWAM-Certified vendors



State Agency Responsibilities

- The role of the state agency procurement officer is more vital than ever
- Must ensure Ordering and Payment requirements are in place for every transaction processed on behalf of your state agency
- Each side of an expenditure transaction includes state agency requirements, compliances, or registrations
- Completing these steps in the proper order facilitates an award that not only complies with state law, but processes more smoothly in *W/OASIS* and prevents issues with your vendor or with state agency requirements

State Agency Responsibilities (Ordering and Payment)

- A transaction's order-from and remit-to requirements include, but not limited to:

Ordering		Payment
Purchasing Division	Delivery, Receipt, and Acceptance of Commodities or Services	Finance Division
Secretary of State		State Auditor's Office
State Tax Department		
WorkForce West Virginia		
Offices of the Insurance Commissioner		

State Agency Responsibilities

- Purchasing Division Vendor Registration
 - Promote vendor use of Vendor Self-Service for vendor registration or furnish appropriate form to vendors with whom you wish to do business
 - Ensure that vendors register *prior* to your agency issuing a purchase order, written or verbal, and before the agency receives commodities or services from any vendor
 - Also verify hold statuses *before* creating wOASIS award document



West Virginia Purchasing Division

Forms

[WV.gov](#) | [Administration](#) | [Purchasing](#) | Forms A++ | A | A-- TRANSLATE bing

The following forms are in PDF format. Use your [Adobe Reader \(TM\)](#) to view and print them:

1. [Vendor Registration & Disclosure Statement and Small-, Women-, & Minority-Owned Business Certification \(Form WV-1\)](#): To subscribe to the [West Virginia Purchasing Bulletin](#) and participate in the competitive bid process, a completed Vendor Registration & Disclosure Statement (Form WV-1) and an annual fee of \$125.00 is required. Prospective vendors should also complete an [IRS Form W9](#) and submit it along with the Form WV-1.
2. [Vendor Registration & Disclosure Statement and Small-, Women-, & Minority-Owned Business Certification \(WV-1A\)](#): For registering sole-source vendors or vendors whose aggregate sales to state agencies are \$2,500 or less in any one year; includes a section to be completed by the requesting state agency; NO FEE REQUIRED. Prospective vendors should also complete an [IRS Form W9](#) and submit it along with the Form WV-1A.
3. [Agreement Addendum](#): Anytime you send a price quote to a state agency on your company form(s), you should also sign and include this form.
4. [Agreement Addendum for Software](#): This "Agreement Addendum for Software" form may be used in lieu of the WV-96 universal "Agreement Addendum" form when a software vendor proposes alternate terms and conditions. It must be signed and retained as part of the final contract/agreement.
5. [Purchasing Affidavit](#): This form is used to certify that bidders do not owe any debts to the state which would preclude them from receiving a purchase order.
6. [Drug Free Workplace Conformance Affidavit](#): This form is required to bid for public improvement contracts.
7. [Drug Free Workplace Report Coversheet](#): Vendors should complete this coversheet and attach it to the required report.
8. [Vendor Preference Certificate](#): This form is used for certification and application of bidders which are eligible to receive vendor preference in accordance with West Virginia Code §5A-3-37 (Does not apply to construction contracts).
9. [Employment History Disclosure Statement](#): The purpose of this form is to require the vendor to disclose other work he or she may be contractually required to complete to the spending agency. The State of West Virginia reserves the right to reject the bid of any vendor when the state believes any current work may cause problems with the vendor successfully completing the bid or contract in question.

State Agency Responsibilities

- If registering a vendor by providing a WV-1A paper vendor registration form:
 - Type your agency's name and mailing address on the WV-1A when you send it to the vendor
 - Inform vendors to mail the WV-1A forms back to the agency, not Purchasing Division
 - Complete Part II
 - Procurement officer signs and forwards WV-1A to the Purchasing Division
 - WV-1A forms without Part II completed and signed by the agency may not be processed
 - WV-1A Part II updated September 2015 to clarify fee exemption on a transactional basis

State Agency Responsibilities

WV-1A
REV. 06/10/2021

New Update

STATE OF WEST VIRGINIA - PURCHASING DIVISION

VENDOR REGISTRATION AND DISCLOSURE STATEMENT AND SMALL, WOMEN-, AND MINORITY-OWNED BUSINESS CERTIFICATION APPLICATION

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STATE AGENCY:



ADDRESS:



CITY, STATE, ZIP:



State Agency Responsibilities

- Prior to promoting registration through the Vendor Self-Service portal or sending a WV-1 or WV-1A form to a vendor, check the VCUST table first to see if the vendor is already registered
 - If found, verify if vendor's business entity is still operating under the same tax ID
 - Check "holds" on the vendor/customer record you need to use
- If vendor is not familiar with *WV*OASIS information for vendors is available at WVPurchasing.gov and <http://www.state.wv.us/admin/purchase/oasis.html>.
- Do not complete any portion of the paper forms for the vendor, or alter the form once received

Purchasing Division Responsibilities

- Review all paper forms or W/OASIS documents for compliance, disclosure information, and payment of annual fee
- Check to make sure the entity is not already registered under a different vendor/customer record
- Determine whether the vendor is registering as a new vendor or updating their previous registration
- Identify headquarters account for vendor's tax ID if registration received for "duplicate" record

Purchasing Division Responsibilities

- Purchasing Division cannot process incomplete vendor registration forms, whether received through *WV*OASIS workflow or paper registration forms
 - “Prevent New Orders” hold will not be removed until all registration requirements are complete
- Incomplete WV-1 forms will be returned to the vendor
- Incomplete WV-1A forms may be returned to the requesting agency’s procurement officer
- Vendors who have not completed the required disclosures or payment of the annual fee will not be taken off the “Prevent New Orders” hold

Vendor Registration Web Pages



West Virginia Purchasing Division

Vendor Registration

[WV.gov](#) | [Administration](#) | [Purchasing](#) | Vendor Registration

A++ | A | A-

TRANSLATE

bing

Vendor Registration

EXPAND YOUR BUSINESS WITH WV. CLICK FOR MORE INFO

JOIN THE PURCHASING DIVISION FOR A FREE INFORMATIONAL SEMINAR ON DOING BUSINESS WITH THE STATE OF WEST VIRGINIA

BECKLEY • OCTOBER 27, 2017 CLARKSBURG • NOVEMBER 3, 2017

- Launched June 2012, Vendor Registration section of Purchasing Division website offers online resources to vendor community
- “Vendor Registration” menu option on [WVPurchasing.gov](#)

If you are experiencing an online payment problem in the Vendor Self-Service portal, please follow the steps [on our FAQ page](#) in order to successfully submit your vendor registration fee.

The West Virginia Purchasing Division registers vendors to do business with state agencies, in accordance with [West Virginia Code §5A-3-12](#). By the authority granted in this section of the code, registration is required of any vendor receiving a purchase order. [West Virginia Code §5A-3-12](#) also requires the disclosure of information, such as ownership, all names under which a vendor is doing business, their physical address, and its corporate officers.

Vendor Registration is now administered through the Vendor Self-Service portal that was launched with the wvOASIS system. Vendors are strongly encouraged to register with the State of West Virginia through the Vendor Self-Service portal of the state's wvOASIS ERP system. The Vendor Self-Service portal may be accessed at [wvOASIS.gov](#). At this same site, vendors may view advertised bidding opportunities in the *West Virginia Purchasing Bulletin*. Vendors may also register by completing a WV-1 or WV-1A *Vendor Registration & Disclosure Statement and Small, Women, & Minority-*

Owned Business Certification form, available online at <http://www.state.wv.us/admin/purchase/forms.html>. Vendors must use the most current version of the WV-1 or WV-1A form from the aforementioned link.

Vendors who wish to participate in the competitive bid process and receive purchase orders exceeding an aggregate amount of \$2,500 must submit payment of a \$125 annual fee. Vendors registering more than one branch may do so without an additional annual fee, provided the branches share the same tax identification number.

Vendors supplying sole-source commodities and services to West Virginia state agencies or aggregate competitive purchases of \$2,500 or less in any one fiscal year are not required to pay the annual fee.



Vendor Registration Web Pages

- Launched August 2015, Vendor Registration section of Purchasing Division intranet site offers online resources specific to agency procurement officials
- <http://intranet.state.wv.us/admin/purchase/VendorReg.html>



Department of Administration
Purchasing Division

VENDOR REGISTRATION

Email: Purchasing.VendorRegistration@wv.gov
Website: <http://intranet.state.wv.us/admin/purchase/VendorReg.html>

State Capitol Complex Phone: (304) 558-2311
2019 Washington Street, East Fax: (304) 558-3507
Charleston, WV 25305 WVPurchasing.gov

Vendor Registration Guide For State Agencies

Program Scope

- The West Virginia Purchasing Division's Vendor Registration program involves two elements: those agencies that are required to register with the state and those agencies that are not required to register with the state. The disclosure of information and payment of a \$125 annual fee.
- The state of West Virginia will be held in bound for the VCUST table in wvOASIS, which is a combination of multiple "pieces" or "pieces" files. The Purchasing Division tracks all information to allow the disclosure of information and payment of the annual fee VCUST records for its services and products.
- Review the first steps of an award, including and payment. The Vendor Registration program focuses on the order phase of a contract and the Finance Division Review and the Vendor's account.

VCUST Agency Responsible	Order Phase	Two Parts to a Transaction	Form ID
Purchasing Division	Purchasing Division	Vendor Registration	Vendor Registration

- Vendor registration requirements mentioned in West Virginia Code §5A-3-12 relate to the "When New Orders" table and to be complete and to be used for any contract award.

Role of the State Agency

The primary role of the West Virginia State Agency is to provide legislative and/or executive approval to the agencies' procurement officials. The agencies' procurement officials are to be in contact with the state agency and encouraged to provide guidance and answers regarding the program and to register with the West Virginia Code, the West Virginia Code of State Rules, and the Purchasing Division's procedures. The agencies' procurement officials are to be in contact with the state agency and encouraged to provide guidance and answers regarding the program and to register with the West Virginia Code, the West Virginia Code of State Rules, and the Purchasing Division's procedures. The agencies' procurement officials are to be in contact with the state agency and encouraged to provide guidance and answers regarding the program and to register with the West Virginia Code, the West Virginia Code of State Rules, and the Purchasing Division's procedures.

The Purchasing Division's State Agency Procurement Officers should contact the Board at board@wvpurchasing.gov

Updated 12/04/2016

West Virginia Purchasing Division

Vendor Registration

Intranet

[WV.gov](#) | [Administration](#) | [Purchasing](#) | [Purchasing Intranet](#) | [Vendor Registration](#)

Vendor Registration for State Agency Employees

This page contains information for state agency procurement employees regarding the Purchasing Division's Vendor Registration policies and procedures and your role in the vendor registration process required by **West Virginia Code §5A-3-12**. Information about this process, its policies, and the procedures related to the program's administration through the wvOASIS system can be found below and on our [Vendor Registration FAQ page](#), also on the state intranet, which also contains information specific to our state agency procurement partners. In addition, the Purchasing Division's *Vendor Registration Guide for State Agencies* is a valuable resource for procurement employees involved with the vendor registration process.



Vendors must register with the Purchasing Division before receiving a purchase order or award document of any value. In the event that your transaction or the vendor's aggregate total sales across all state agencies exceed \$2,500.00, a \$125.00 annual fee is required from the vendor. According to §5A-3-12, "The director may not accept any bid received from any vendor unless the vendor has paid the annual fee ... and has filed with the director an affidavit ... disclosing ... information." Several exceptions to the vendor registration annual fee are detailed in Section 9 of the [Purchasing Division Procedures Handbook](#).

Purchasing Division Vendor Registration	
Disclosure of Information	Payment of Annual Fee

VENDOR REGISTRATION FREQUENTLY-ASKED QUESTIONS FROM STATE AGENCY EMPLOYEES

There are two ways to determine if a vendor/customer has an existing account with the state before document or with the vendor registration process. A state agency employee can "jump" to the V recommended before proceeding with an award document. In addition, a vendor can check their Vendor Self-Service Portal at wvOASIS.gov.

Checking a Vendor's Registration through the VCUST table in wvOASIS



West Virginia Purchasing Bulletin

- Used to advertise all competitive purchases expected to exceed \$10,000
 - Can also include lesser-value solicitations if state agency chooses
- Agencies may access using the “View Published Solicitations” button on Vendor Self-Service
- Click on specific solicitation’s ID number link to view appropriate solicitation information, including specifications
- Vendors benefit from knowing where solicitation opportunities are advertised

The screenshot shows the 'Published Solicitations' page in the iNOASIS system. It features a search bar at the top with a 'Show Me' dropdown set to 'Open' and a 'Keyword Search' input field. Below the search bar is a table listing various solicitations. The table has columns for Description, Department / Buyer, Solicitation Number / Type / Category, and Closing Date and Time/Status. Each row includes a 'Request' button. The row for 'STRUCTURAL STEEL W PILES' is highlighted in blue.

Description	Department / Buyer	Solicitation Number / Type / Category	Closing Date and Time/Status	Request
➤ Addendum No. 1 Elevator Maintenance & Repairs WV Army Guard	ADJUTANT GENERAL David H Pauline	CRFG-0603-AG-2100000031-0 Centralized Request for Quote (CRFG) Service - Prof	01/26/2021 01:30 PM EST 0 Days, 01:51:10 Open	Request
➤ Addendum No. 2 Elevator Maintenance	VETERANS HOME Tara Lyle	CRFG-0618-8VH2100000003-0 Centralized Request for Quote (CRFG) Construction	01/26/2021 01:30 PM EST 0 Days, 01:51:10 Open	Request
➤ Preventative Maintenance	DEPARTMENT OF AGRICULTURE Jessica S Chambers	CRFG-1400-AGR2100000008-0 Centralized Request for Quote (CRFG) Service - Prof	01/26/2021 01:30 PM EST 0 Days, 01:51:10 Open	Request
➤ STRUCTURAL STEEL W PILES	DIVISION OF HIGHWAYS John W Satap	CRFG-0603-G072100000072-1 Centralized Request for Quote (CRFG) Miscellaneous	01/26/2021 01:30 PM EST 0 Days, 01:51:10 Open	Request
➤ Openend contract for a Claims Administrator and Adjuster	DEPARTMENT OF ENVIRONMENTAL PROTECTION Joseph E Hager III	CRFG-0313-SEP1100000019-0 Centralized Request for Quote (CRFG) Consulting	01/26/2021 01:30 PM EST 0 Days, 01:51:10 Open	Request
➤ Data Center 2.0 Circuit (0721086)	OFFICE OF TECHNOLOGY Jessica S Chambers	CRFG-0221-G072100000003-0 Centralized Request for Quote (CRFG) Info Technology	01/26/2021 01:30 PM EST 0 Days, 01:51:10 Open	Request
➤ Athletic Shoes for DCR	DIVISION OF CORRECTIONS AND REHABILITATION Beverly L Ruppert	ARFG-0608-GCR2100000085-1 Agency Request for Quote (ARFG)	01/26/2021 04:00 PM EST 0 Days, 04:21:10 Open	Request


West Virginia Purchasing Bulletin History

- December 1, 1989: First issue of Bulletin published
- Published twice monthly until October 2, 2001
- October 2, 2001: Bulletin published weekly
- July 1, 2002: Posted weekly on Purchasing Division's web site, in addition to published weekly
 - Hard copy mailed to vendors every other week
- June 1, 2005: Posted every Friday on web site only
 - Hard copies are no longer mailed to vendors
- June 16, 2014: Vendor Self-Service early-access period open for use by the vendor community
- July 8, 2014: Phase C of wvOASIS went live; Bulletin migrated to Vendor Self-Service portal
 - Remaining TEAM-era solicitations still published by Purchasing Division
- October 10, 2014: Last issue of weekly Purchasing Division-published Bulletin

Find Vendors By Commodity Codes on File in VCUST

- Business Intelligence > Advantage Financial > Procurement > **WV-FIN-VN-010 Vendors by Commodity**
 - Identify a larger solicitation audience by the commodity code(s) specified by vendor in their record.
 - wvOASIS > VCUST > Commodity
 - State agencies can run the above report in Business Intelligence by the UNSPSC commodity code relevant to their solicitation and export the data to Excel to further analyze vendor contact information.
 - Give your potential bidding audience a standard heads up directing them to a specific active solicitation.

WV-FIN-VN-010 Vendors by Commodity



unspsc®

HOME FAQs **SEARCH-CODE** MEMBERSHIP LIBRARY C

Version 22.0601

Search Code

Search Title

Code	Title
41113603	Laboratory bridges
42151605	Crown or bridge removers
72141107	Bridge construction and repair s
30121703	Bridge rail
43232913	Bridge software
32121708	Bridge rectifier
20121102	Bridge plugs
54111703	Watch or clock plates or bridge

Prompts

Available prompt variants

Prompts Summary

- * Enter Commodity Code: **72141107**
- * Enter First 2 Digits of Comm Code Follow

Enter First 2 Digits of Comm Code Followed By %

* Required prompts

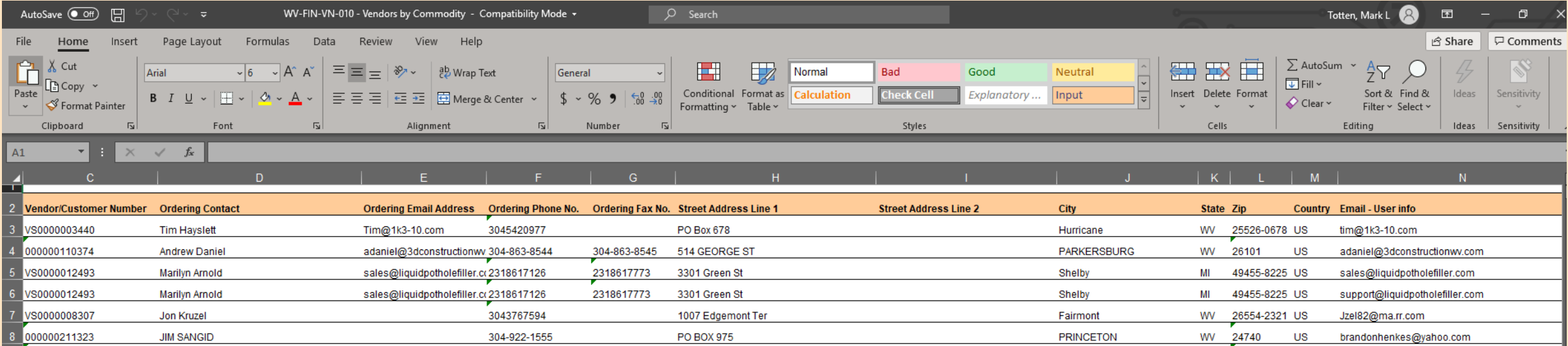
WV-FIN-VN-010 Vendors by Commodity

The screenshot shows a Business Intelligence application interface. On the left, there is a 'User Prompt Input' panel with fields for 'Enter Commodity Code:' and 'Enter First 2 Digits of Comm Code Follow'. The main area displays a table with columns: 'Vendor Headquarter Name', 'Vendor/Customer Number', 'Ordering Contact', and 'Ordering Email'. An 'Export' dialog box is open, showing options to export as 'Reports' or 'Data'. Under 'Data', there are checkboxes for 'Select All', 'WV-FIN-VN-010 COVER', and 'Vendors by Commodity'. The 'File Type' is set to 'Excel (.xlsx)'. The table data includes entries like '1888 Industri...', '1Korin3-10 Ir...', '3D CONSTR...', '4Seasons Pa...', '4Seasons Pa...', 'A1 lawncare', 'AAA SEPTIC', 'Aaron's Towi...', 'A & A SAFET...', 'A & A SAFET...', and 'A & A SAFET...'.

Vendor Headquarter Name	Vendor/Customer Number	Ordering Contact	Ordering Email
1888 Industri...		ne Peterson	
1Korin3-10 Ir...		layslett	Tim@1k3-10.con
3D CONSTR...		ew Daniel	adaniel@3dcons
4Seasons Pa...		yn Arnold	sales@liquidpoth
4Seasons Pa...		yn Arnold	sales@liquidpoth
A1 lawncare		Kruzel	
AAA SEPTIC		SANGID	
Aaron's Towi...		n Jenkins	adjenkins1986@
A & A SAFET...		IG WILHOIT	
A & A SAFET...		DBRIEN	
A & A SAFET...		DBRIEN	

- The data output by Business Intelligence can be saved as a Microsoft Excel file for sorting and review of vendor data.
- Other options for saving data exist, but Excel allows easy sorting and copying of potential vendor information.

WV-FIN-VN-010 Vendors by Commodity



Vendor/Customer Number	Ordering Contact	Ordering Email Address	Ordering Phone No.	Ordering Fax No.	Street Address Line 1	Street Address Line 2	City	State	Zip	Country	Email - User info
VS0000003440	Tim Hayslett	Tim@1k3-10.com	3045420977		PO Box 678		Hurricane	WV	25526-0678	US	tim@1k3-10.com
000000110374	Andrew Daniel	adaniel@3dconstructionwv	304-863-8544	304-863-8545	514 GEORGE ST		PARKERSBURG	WV	26101	US	adaniel@3dconstructionwv.com
VS0000012493	Marilyn Arnold	sales@liquidpotholefiller.c	2318617126	2318617773	3301 Green St		Shelby	MI	49455-8225	US	sales@liquidpotholefiller.com
VS0000012493	Marilyn Arnold	sales@liquidpotholefiller.c	2318617126	2318617773	3301 Green St		Shelby	MI	49455-8225	US	support@liquidpotholefiller.com
VS0000008307	Jon Kruzal		3043767594		1007 Edgemont Ter		Fairmont	WV	26554-2321	US	Jzel82@ma.rr.com
000000211323	JIM SANGID		304-922-1555		PO BOX 975		PRINCETON	WV	24740	US	brandonhenkes@yahoo.com

- Exported spreadsheet conveniently centralizes entity name, wvOASIS v/c #, Ordering address, telephone number(s), and email address(es) on file for prospective vendors.
 - Some record duplication exists to display multiple contact persons.

In Review

- Purchasing Division maintains the “Prevent New Orders” field on the VCUST table; the Finance Division is responsible for “Hold Payment.”
- Before you proceed with the Vendor/Customer registration process, determine if the Vendor/Customer already has an account with the State.
 - VCUST table in *wv*OASIS
 - Identify the Headquarters-designated vendor/customer number in *wv*OASIS
 - “Fingerprint” tax identification number
 - Check “Prevent New Orders” hold and “Hold Payment” status *prior* to creating award document and proceed accordingly (“Ready, Aim, Fire”)
- If account exists, encourage the Vendor/Customer to request any change(s) to their account directly through the Vendor Self-Service portal *or* submit a VCM document from your agency.
 - Electronic method of registration preferred

In Review

- Use resources at your disposal to navigate through the process and its requirements.
- Vendor Self-Service account creation does not equate to registration with any state agency.
- If no account exists, encourage the Vendor/Customer to complete the application process through Vendor Self-Service *or* submit a WV-1 or WV-1A form, *or* submit the VCC document from your agency.
 - If registering a vendor with a VCC document, have information (Disclosure of Information, Addresses) received from vendor documented in order to verify your source; do not rely on Internet searches.

In Review

- Registrations, re-registrations, and account updates are pending review of the state.
 - Clicking “VCM Query” at the bottom of an entity’s VCUST record will list any pending workflow documents under review by an agency.
- Vendor Registration policies apply transactionally, not by vendor.
 - VNREGEX code usage part of Inspection Unit’s review of all agencies; letters are being sent to state agencies regarding specific misuses.
- Refer vendor community to **WVPurchasing.gov**’s “Vendor Registration” section; agencies regularly check Purchasing Division intranet’s Vendor Registration section.

If You Need Help

- Your first line of assistance is with your agency-designated procurement officer.
 - www.state.wv.us/admin/purchase/vrc/agencyli.html
- For system-related problems, please contact the *wv*OASIS Help Desk at (304) 558-6708, toll free at (855) 666-8823, or helpdesk@wvOASIS.gov.

Purchasing Division Contacts

- For all other Vendor Registration and Vendor/Customer Registration Creation and Maintenance questions, please contact:
 - Mark Totten, Technical Services Manager, Purchasing Division
 - Mark.L.Totten@wv.gov
 - (304) 558-7839; State Cisco Network Extension 57530
 - Terra Oliver, Vendor Registration Coordinator, Purchasing Division
 - Purchasing.VendorRegistration@wv.gov
 - (304) 558-2311; State Cisco Network Extension 57500
 - FAX: (304) 558-3507

Questions?

**THE
WEST VIRGINIA
PURCHASING DIVISION
WANTS
YOUR COMPANY**

A hand in a white shirt sleeve is shown pointing directly at the viewer through a hole that has been torn in a piece of paper. The hand is positioned centrally below the main text and above the bottom text.

TO COMPETITIVELY BID

WWW.STATE.WV.US/ADMIN/PURCHASE/VENDORREG.HTML