

# RFQ's From A to Z

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*2022 Agency Purchasing Conference*



# Process/Law Changes To Help You

**Secretary of State Contact (2022):** Identified designated point of contact for issues with the Secretary of State registration.

**Illegal Terms Law (2021):** This change allows the State to enter into contracts more quickly by eliminating the need to negotiate various illegal terms.

**Post Contract Awards Electronically (2021):** All contract awards are now posted online, reducing the cost associated with distribution of paper copies and responding to FOIA requests.

**Vendor Commodity Registration Report (2020):** The Purchasing Division developed a report that would identify all vendors registered for a certain commodity code so that targeted notice of bidding opportunities could be provided.

**Modifies the Disclosure of Interested Parties Form (2018):** Increases the limit for the Disclosure of Interested Parties from \$100,000 to \$1 million. Additionally, this form will no longer apply to publicly traded companies.

# Objectives

- Define a Request for Quotations (RFQ)
- Review the elements, including attachments, needed to prepare the requisition
- Discuss the advertisement period utilizing the West Virginia Purchasing Bulletin
- Discuss the formal process from the time of bid opening to the award of a contract/purchase order
- Provide an overview of pertinent documents and verification search requirements
- Analyze some of the unique circumstances which require additional attention

# Request for Quotations

## What is a Request for Quotation (RFQ)?

- A procurement method containing the specifications or scope of work and all contractual terms and conditions.
- Used to solicit written or electronic bids. Conformity to specifications and price are the only factors used in the evaluation process
- RFQ is the preferred method to acquire all tangible property and most services
- Used when an agency knows exactly what it needs
- Blackout period

# Request for Quotations

## An RFQ consists of:

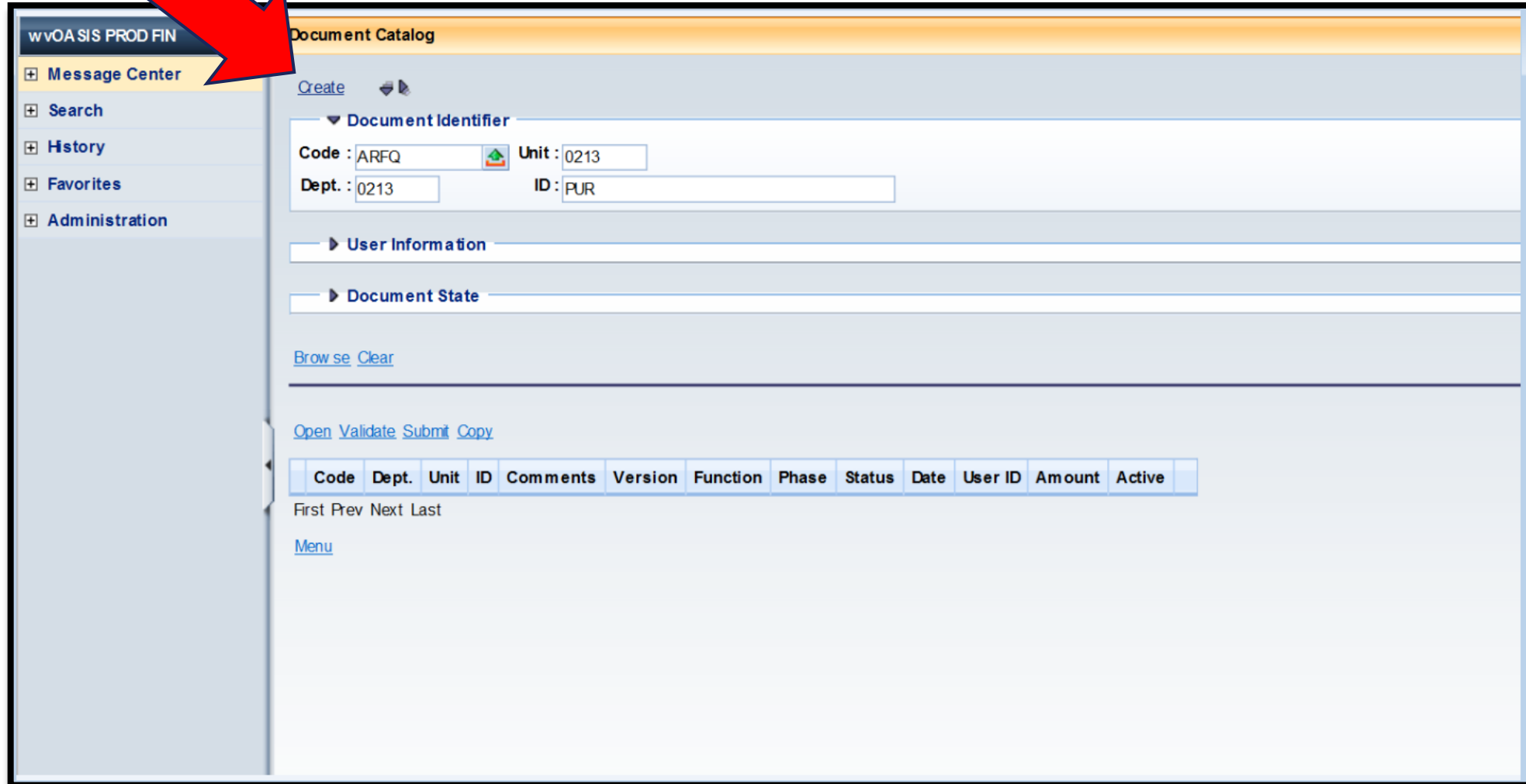
- Detailed description of, or specifications for, an item or service being purchased
- Required delivery or service dates
- Bid price per unit; commodity line type ITEM or SERVICE; catalog, percentage discount or mark-up
- Any applicable maintenance
- Quantities of all items. Each item should be identified by a model number or some other specific identification
- Schedule of Events, including questions, mandatory pre-bid conference, and bid opening
- Master Terms and Conditions

# Preparing the requisition

## For procurements greater than \$25,000

- Types
  - Centralized Standard Requisition (CRQS) –
    - Fixed Amount (i.e. for a CCT or CPO final product)
  - Centralized Master Agreement Requisition (CRQM) –
    - Open-end/Master agreement (i.e. for a CMA final product)
  - Delivery Orders – ADO/CDO –
    - Always refer to the ordering instructions prior to issuance
- “A” versus “C” documents

# To Create a Document



The screenshot shows a web application interface for creating a document. A red arrow points to the 'Message Center' menu item in the left sidebar. The main content area is titled 'Document Catalog' and contains a 'Create' button. Below the 'Create' button, there is a 'Document Identifier' section with input fields for 'Code' (ARFQ), 'Unit' (0213), 'Dept.' (0213), and 'ID' (PUR). There are also sections for 'User Information' and 'Document State'. Below these sections, there are links for 'Browse' and 'Clear'. At the bottom, there are links for 'Open', 'Validate', 'Submit', and 'Copy'. A table with columns for 'Code', 'Dept.', 'Unit', 'ID', 'Comments', 'Version', 'Function', 'Phase', 'Status', 'Date', 'User ID', 'Amount', and 'Active' is visible. Below the table, there are navigation links: 'First', 'Prev', 'Next', and 'Last'. A 'Menu' link is also present at the bottom.

wwOA SIS PROD FIN Document Catalog

[Create](#)

**Document Identifier**

Code : ARFQ Unit : 0213

Dept. : 0213 ID : PUR

**User Information**

**Document State**

[Browse](#) [Clear](#)

[Open](#) [Validate](#) [Submit](#) [Copy](#)

Code	Dept.	Unit	ID	Comments	Version	Function	Phase	Status	Date	User ID	Amount	Active
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First Prev Next Last

[Menu](#)

# To Create a Document

wwOASIS PROD FIN

Document Catalog

Search

Document Identifier

Code : ARFQ Unit : 0213

Dept. : 0213 ID : PUR

Other Options

Auto Numbering :

Create Template :

Create



# Preparing the Requisition

## Commodity Codes

- UNSPSC- [UNSPSC.org](http://UNSPSC.org)
- How to know which code to use
- Don't be too specific or you will lose potential vendors

# Preparing the Requisition

- Terms and Conditions – Agency and Purchasing versions – make sure you have the most current version.
- Initial Contract Term –
  - Open-end contracts - standard initial one-year term
  - Renewals – standard three successive one-year periods
  - Software contracts – with maintenance may have an extended initial term up to 5 years
    - One-time purchase – generally no term
    - Construction contracts – require a time period (may be over one year) approvals
- Insurance Requirements (general liability, workers' compensation, professional liability, automobile coverage, etc.).
- For more information on coverages and limits – see Handbook Section, 3.2.5.3, Appendix C or contact BRIM at 304-766-2646 or <https://brim.wv.gov>
- State of WV must be listed as an additional insured on all mandated insurance policies

# Attaching Terms and Conditions

Centralized Request for Quote (CRQ) | Dept: 0216 | ID: FL190000001 | Ver.: 2 | Function: Modification | Phase: Draft | Modified by: harpenh | 6/16/2015

**Document Navigator**

- Header
- Schedule of Events
- Terms and Conditions**
- Commodity Group
- Commodity
- Commodity T & C
- Evaluation Criteria Group
- Evaluation Criteria Line
- Vendor List
- Free Form Vendor
- Vendor Rotation
- Commodity E-mail Push
- Publishing
- Supporting Documents

**Terms and Conditions** 1 | T & C: ATTACH | Name: T & C Attached

	Section	T & C	Name	In
1	4	ATTACH	T & C Attached	by full text

From 1 to 1 Total: 1

First Previous Next Last

T & C: ATTACH

Name: T & C Attached

Section: 4

Sequence:

Inc By: by full text

T&C Attachment File Name: ATTACHED\_ADDITIONAL\_T\_AND\_C.XML

Details:

Inactive Line:

# Attaching Terms and Conditions

**Choose**

[Browse](#) [Clear](#)

Terms and Conditions:  Name:

Attachments Group ID:  Attachments:

Attachment File Name:

	Terms and Conditions	Name	Attachments Group ID	Attachments	Attachment File Name
<a href="#">Select</a>	A1	Agency Terms and Conditions	ADV135242726	1	AGENCY_TERMS_AND_CONDITIONS.XML
<a href="#">Select</a>	A2	Agency A&E Additional T & C	ADV100009105	1	AGENCY_A&E_ADDITIONAL_TERMS_AND_CONDITIONS.XML
<a href="#">Select</a>	A3	Agency Const. Additional T&C	ADV100009106	1	AGENCY_CONSTRUCTION_CONTRACTS_ADDITIONAL_T_AND_C.XML
<a href="#">Select</a>	ATTACH	T & C Attached	ADV100352319	1	ATTACHED_ADDITIONAL_T_AND_C.XML
<a href="#">Select</a>	BLANK	Revised Blank	ADV100505475	1	REVISED-BLANK.XML
<a href="#">Select</a>	C1	Central Terms and Conditions	ADV100009107	1	CENTRAL_TERMS_AND_CONDITIONS.XML
<a href="#">Select</a>	C2	Central A&E Additional T & C	ADV100009108	1	CENTRAL_A&E_ADDITIONAL_TERMS_AND_CONDITIONS.XML
<a href="#">Select</a>	C3	Central Constr Additional	ADV100009109	1	CENTRAL_CONSTRUCTION_CONTRACTS_ADDITIONAL_T_AND_C.XML
<a href="#">Select</a>	CONV	Conversion Default		0	

[Cancel](#) [First](#) [Prev](#) [Next](#) [Last](#)

# Preparing the Requisition

## Bid opening date and time –

- Purchasing Division offices, Monday – Friday at 1:30 p.m.
- Agencies should avoid using this bid opening time
- Be mindful of holidays and allowing vendors ample time to respond to solicitations

# Schedule of Events

Schedule of Events				
Total Lines: 1 Line: 1 Line: 1				
Line	Event	Event Date	Inactive Line	
1	Question deadline 1:00 p.m.	02/01/2019	No	
From 1 to 1 Total: 1		<a href="#">First</a> <a href="#">Previous</a> <a href="#">Next</a> <a href="#">Last</a>		

# Publishing Tab

Document Navigator		
Header		
Schedule of Events		
Terms and Conditions		
Commodity Group		
Commodity		
Commodity T & C		
Evaluation Criteria Group		
Evaluation Criteria Line		
Vendor List		
Free Form Vendor		
Vendor Rotation		
Commodity E-mail Push		
<b>Publishing</b>		
Supporting Documents		

Publishing		
Procurement Folder: 541951	Create Vendor Notification: <input checked="" type="checkbox"/>	Commodity Description: <input checked="" type="checkbox"/>
Amendment Number:	Schedule of Events: <input checked="" type="checkbox"/>	Item Shipping: <input checked="" type="checkbox"/>
Published Date:	Terms and Conditions: <input checked="" type="checkbox"/>	Item Specifications (Handling): <input checked="" type="checkbox"/>
Published Time:	Evaluation Criteria: <input checked="" type="checkbox"/>	Item Specifications (Details): <input checked="" type="checkbox"/>
Original Let Date: 01/25/2019	Evaluation Criteria (Points): <input type="checkbox"/>	Commodity Terms and Conditions: <input checked="" type="checkbox"/>
Let Date: <input type="text" value="01/25/2019"/>	Amendment History: <input checked="" type="checkbox"/>	Commodity Attachments: <input checked="" type="checkbox"/>
Close Date: <input type="text" value="02/08/2019"/>	Document Attachments: <input checked="" type="checkbox"/>	Prohibit Online Responses: <input type="checkbox"/>
Close Time: <input type="text" value="13:30"/>	Publish Vendor List: <input type="checkbox"/>	AttachmentList: <input type="text"/>
Public Bid Opening Date: <input type="text"/>	Only Notify Vendor List: <input type="checkbox"/>	Restrict Multiple Responses per Vendor TIN: <input type="checkbox"/>
Public Bid Opening Time: <input type="text"/>		

# Preparing the Requisition

- Should suggest three potential vendors qualified to bid on the solicitation. Gain vendors through market research, supplier's catalogs, internet searches, and wvOASIS

The screenshot shows a web application interface for adding vendors. At the top, there is a header bar with the text 'Free Form Vendors' and status information: 'Total Lines: 0 Line Number: none Vendor Name: none'. Below the header is a table with columns for 'Line Number' and 'Vendor Name'. The table is currently empty, with a status 'From 0 to 0 Total: 0' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'. Below the table is a form titled 'Free Form Vendors' with various input fields for vendor information:

- Line Number:
- Vendor Name:
- Principal Contact:
- Added Using:
- Comments:
- Address 1:
- Address 2:
- City:
- State Code:
- State:
- Zip:
- County Code:
- County:
- Country:
- Telephone Number:
- Fax Number:
- Email Address:
- Correspondence Type:
- Business Types:

- Free form vendors
  - Allows you to add a vendor to a requisition who may not be registered for a specific commodity code; this ensures they will be notified of the solicitation



# Preparing the Requisition

## Special Forms

- HIPAA and Business Associate Addendum – only applies when the vendor will have access to protected health information
- WV96 – agreement addenda – utilized to counter a vendor's submission of alternate terms and conditions. Should not be included in the outgoing solicitation, only utilized after it is clear from vendor's bid that alternate terms and conditions have been proposed.
  - May require Purchasing's attorney and Attorney General's office review

# Blackout Period Begins

## What is the blackout period?

- Period from which the requisition is submitted to the Purchasing Division until after the award is made whereas the agency should have no contact with the vendor (this includes ALL agency staff, including field office personnel)
- All correspondence with a vendor regarding a current solicitation should go through the agency's designated Purchasing Division buyer

# The RFQ Process

## Advertisement of RFQ in Bulletin

- Purchasing Division buyer will review the requisition and specifications
- Upon satisfactory review, the Purchasing Division buyer will create the solicitation
  - The solicitation will be advertised in the West Virginia Purchasing Bulletin, accessible to vendors through the Vendor Self-Service
  - Language may include:
    - Deadline for technical questions
    - Date for mandatory pre-bid conference
- Vendors suggested by the Agency will be notified of the solicitation

# The RFQ Process

## Advertisement of RFQ in Bulletin

- Purchasing Division may include other required documentation with the solicitation
  - Construction Documents (i.e. Drug Free Workplace Affidavit)
  - Other documents as needed

# The RFQ Process

- Lump Sum Pricing
- Exhibit A
  - Total bid amount
  - Usually for a service

Exhibit "A" Pricing Sheet

Furnish all labor, material, tools, equipment, and services for installing all preformed roofing, on the Bathhouse, Residence and Office Building located at Camp Washington Carver, Clifftop West Virginia, per the Contract Documents.

**TOTAL BID AMOUNT: \$** \_\_\_\_\_

Firm Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Title \_\_\_\_\_

# The RFQ Process

- Bid Scenario Pricing
- Exhibit A
  - Item # - Coincides with wvOASIS commodity line
  - Item description
  - Unit of measure
  - Unit price
  - Estimated quantity
  - Extended price

Exhibit A - Pricing Page					
Soft Drink Tax Stamps					
Item #	Item Description	Unit of Measure	Unit Price	Estimated Qty	Extended Price
3.1.2.6.1	One (1) Cent Stamp - "1c"	Per Sheet		100000	\$ -
3.1.2.6.2	Two (2) Cent Stamp - "2c "	Per Sheet		100000	\$ -
3.1.2.6.3	Four (4) Cent Stamp - "4c"	Per Sheet		100000	\$ -
3.1.2.6.4	Ten (10) Cent Stamp - "10c"	Per Sheet		100000	\$ -
3.1.2.6.5	Fifteen (15) Cent Stamp - "15c"	Per Sheet		100000	\$ -
3.1.2.6.6	Twenty (20) Cent Stamp - "20c"	Per Sheet		100000	\$ -
3.1.2.6.7	Twenty-Four (24) Cent Stamp - "24c"	Per Sheet		100000	\$ -
3.1.2.6.8	Thirty-two (32) Cent Stamp - "32c"	Per Sheet		100000	\$ -
3.1.2.6.9	Thirty-six (36) Cent Stamp - "36c"	Per Sheet		100000	\$ -
3.1.2.6.10	Thirty-eight (38) Cent Stamp - "38c"	Per Sheet		100000	\$ -
3.1.2.6.11	Forty (40) Cent Stamp - "40c"	Per Sheet		100000	\$ -
4.1.2.6.12	Forty-eight (48) Cent Stamp - 48c"	Per Sheet		100000	\$ -
4.1.2.6.13	Sixty (60) Cent Stamp - "60c"	Per Sheet		100000	\$ -
4.1.2.6.14	Eighty (80) Cent Stamp - "80c"	Per Sheet		100000	\$ -
4.1.2.6.15	Two (2) Dollar Stamp - "\$2.00"	Per Sheet		100000	\$ -
4.1.2.6.16	Four (4) Dollar Stamp - "\$4.00"	Per Sheet		100000	\$ -
				<b>Total Bid Amount</b>	\$ -

# The RFQ Process

## Pre-Bid Conference

- Meeting between vendors and agency personnel for solicitations that are complex and high dollar in nature
- Explain and clarify critical aspects of a solicitation
- Eliminates misunderstanding and permits vendor input
- Mandatory
  - Only vendors attending the pre-bid may submit a bid
- See Appendix A in Handbook for sign-in sheet or on the Forms page of our website. It is item number 47.

# After the RFQ is Published: How to View Solicitation in VSS

The screenshot shows the wvOASIS.gov website. The browser address bar displays "wvOASIS.gov" and "Not secure | wvoasis.gov". The website header includes the "wvOASIS" logo and navigation links: "Home | Upcoming Events | Job Opportunities | VSS Training | Contact Us".

The main content area features two primary sections:

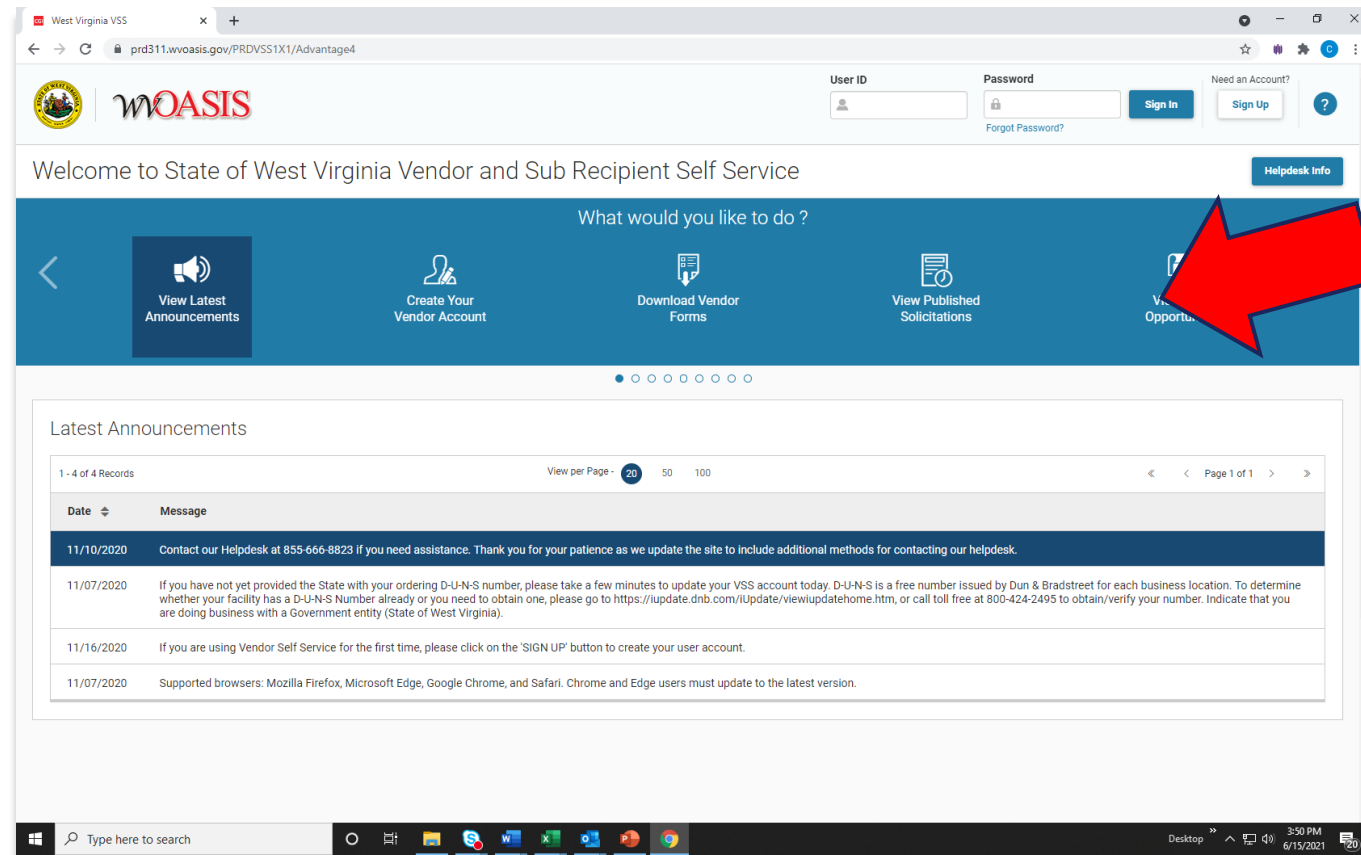
- myApps**: A section describing a one-stop shop for agency end users, with a blue button labeled "myApps".
- The West Virginia Vendor Self Service (VSS) portal**: A section providing information about the VSS portal. It includes a blue button labeled "VSS Portal" and a link for "VSS Maintenance". A large red arrow points to the "VSS Portal" button.

On the right side of the page, there is a "myOASIS HelpDesk" section with contact information: "Toll Free (855) 666-8823", "Mon-Fri (7am to 4:30pm)", "Excluding State Holidays", and the email "helpdesk@wvOASIS.gov".

The Windows taskbar at the bottom shows the search bar, taskbar icons, and system tray with the date "6/15/2021" and time "3:49 PM".



# After the RFQ is Published: How to View Solicitation in VSS



The screenshot shows the West Virginia Vendor and Sub Recipient Self Service (VSS) website. The browser address bar displays the URL `prd311.wvoasis.gov/PRDVSS1X1/Advantage4`. The page header includes the MOASIS logo and a login section with fields for User ID and Password, along with 'Sign In', 'Sign Up', and 'Forgot Password?' links. Below the header, a welcome message reads 'Welcome to State of West Virginia Vendor and Sub Recipient Self Service' with a 'Helpdesk Info' button. A central navigation bar asks 'What would you like to do?' and features five buttons: 'View Latest Announcements', 'Create Your Vendor Account', 'Download Vendor Forms', 'View Published Solicitations', and 'View Opportunities'. A large red arrow points to the 'View Published Solicitations' button. Below this bar, the 'Latest Announcements' section displays a table of messages with columns for 'Date' and 'Message'. The table contains four entries, with the first one highlighted in blue.

Date	Message
11/10/2020	Contact our Helpdesk at 855-666-8823 if you need assistance. Thank you for your patience as we update the site to include additional methods for contacting our helpdesk.
11/07/2020	If you have not yet provided the State with your ordering D-U-N-S number, please take a few minutes to update your VSS account today. D-U-N-S is a free number issued by Dun & Bradstreet for each business location. To determine whether your facility has a D-U-N-S Number already or you need to obtain one, please go to <a href="https://iupdate.dnb.com/iUpdate/viewiupdatehome.htm">https://iupdate.dnb.com/iUpdate/viewiupdatehome.htm</a> , or call toll free at 800-424-2495 to obtain/verify your number. Indicate that you are doing business with a Government entity (State of West Virginia).
11/16/2020	If you are using Vendor Self Service for the first time, please click on the 'SIGN UP' button to create your user account.
11/07/2020	Supported browsers: Mozilla Firefox, Microsoft Edge, Google Chrome, and Safari. Chrome and Edge users must update to the latest version.

# After the RFQ is Published: How to View Solicitation in VSS

The screenshot displays the West Virginia Vendor and Sub Recipient Self Service (VSS) website. The browser address bar shows the URL: `prd311.wvoasis.gov/PRDVSS1X1/Advantage4`. The page header includes the MOASIS logo and a navigation menu with options: "View Latest Announcements", "Create Your Vendor Account", "Download Vendor Forms", "View Published Solicitations" (highlighted), and "View Grant Opportunities".

The main content area is titled "Published Solicitations" and features a search interface with the following fields:

- Search (dropdown)
- Show Me (dropdown)
- Open (dropdown)
- Category (dropdown)
- Type (dropdown)
- Keyword Search (text input)
- Status (dropdown)
- Search (button)
- Reset (button)

Below the search interface is a table of published solicitations. The table has columns for Description, Solicitation Number / Type / Category, Closing Date and Time/Status, and Published On. A "Grid Actions" dropdown is visible above the table.

Description	Solicitation Number / Type / Category	Closing Date and Time/Status	Published On
Books: Various Books	ARFQ-0402-ED02100000057-1 Agency Request for Quote (ARFQ) Educational	06/16/2021 10:00 AM EDT 0 Days, 18:08:30 Open	06/02/2021
Dotimage Document Imaging and PDF Text Extraction Software	ASSD-0928-PSC2100000001-1 Agency Sole Source Determination (ASSD) Info Technology	06/16/2021 10:30 AM EDT 0 Days, 18:38:30 Open	06/03/2021
Commercial Washer w/installation for JWH	ARFQ-0506-JWH2100000004-1 Agency Request for Quote (ARFQ) Household Items	06/16/2021 01:00 PM EDT 0 Days, 21:08:30 Open	05/27/2021
UNIFORM RENTAL AND CLEANING SERVICE	CRFQ-0704-LOT2100000009-1	06/16/2021 01:30 PM EDT	06/02/2021

The Windows taskbar at the bottom shows the system time as 3:51 PM on 6/15/2021 and a notification for 20 new notifications.

# Solicitation Methods

## Request for Quotations

- Low bid meeting all mandatory specifications
  - Most commonly used method by Purchasing Division
  - Mandatory specifications include terms will, shall, and must

# The Evaluation Process

- After the bid opening
  - The agency will download bids from the Purchasing Division's website
    - [www.state.wv.us/admin/purchase/Bids](http://www.state.wv.us/admin/purchase/Bids)
- Evaluate each vendor's bid submission to ensure they meet all mandatory specifications, cost, and that required documentation has been provided
  - How do you know if a vendor has met the mandatory requirements?

# The Evaluation Process

## Special Circumstances

- Tie bids (both Agency and Central procurements handled by Purchasing Division)
  - Resolved through any impartial method
    - Best and final offer
    - Flip of a coin
    - Draw of a card
- Erroneous bids
  - A vendor's request to have a bid rejected must be received in writing within five days of the bid opening – procedures for withdrawing a bid found in Legislative Rule §148CSR1

# The Evaluation Process

## Erroneous Bids

6.3.f. The Director may reject a bid that a vendor declares to be erroneous after the bid opening, but otherwise appears to be responsive, if all of the following conditions exist: (1) An error was made; (2) The error materially affected the bid; (3) Rejection of the bid would not cause a hardship on the State spending unit involved, other than losing an opportunity to receive commodities, services or printing at a reduced cost; and (4) Enforcement of the part of the bid in error would be unconscionable. In order for the Director to reject a bid under this subsection, the public file must contain documented evidence that all of the conditions set forth in this subdivision exist.

# The Evaluation Process

## Special Circumstances

- Clarification
  - Purchasing Division handles this
  - Only used to clarify a vendor's proposal, not change it
  - Don't ask for clarification if it's clear the vendor did not meet a specification
  - Poor clarification can hurt instead of help. Use as few words as possible (Example: yes/no)

# The Evaluation Process

## Things to Do

- Check the vendor's math
- If there was a mandatory pre-bid meeting, did lowest bidder attend?
- If an addendum was issued for the solicitation, did the vendor provide a signed addendum acknowledgement form with his or her bid?
- Did the vendor use the correct pricing page?
- Did the vendor propose alternate terms and conditions?
  - Only get WV-96 if alternate terms and conditions conflict with state's
- Is there firm, fixed pricing?




# The Evaluation Process

## Agency has determined the awarded vendor

- Submit a recommendation for award to the Purchasing Division buyer
- State that the recommended vendor meets all mandatory specifications
- State whether the vendor provided the lowest cost
- If recommended vendor is not the low bid, explain why the low bid did not receive the award (i.e. low bidder missed a mandatory specification)
- Provide a signed Non-Conflict of Interest form
- Failure to timely review bids and recommend an award may result in bid expiration, project delays, longer procurement process and/or cancellation

# The Evaluation Process

- Non-Conflict of Interest
  - Applies to all transaction types (CPO, CMA, CCT)
  - Certifies that the evaluator has no conflict of interest with a vendor
  - If the evaluator is not the agency's procurement officer, the procurement officer must also sign the non-conflict form



STATE OF WEST VIRGINIA  
Purchasing Division

**CERTIFICATION OF NON-CONFLICT OF INTEREST**

**West Virginia Code § 5A-3-31:** "It shall be unlawful for any person to corruptly combine, collude or conspire with one or more other persons with respect to the purchasing or supplying of commodities or printing to the state under the provisions of this article if the purpose or effect of such combination, collusion or conspiracy is either to (1) lessen competition among prospective vendors, or (2) cause the state to pay a higher price for such commodities or printing than would be or would have been paid in the absence of such combination, collusion or conspiracy, or (3) cause one prospective vendor or vendors to be preferred over one or more other prospective vendor or vendors. Any person who violates any provision of this section shall be guilty of a felony, and, upon conviction thereof, shall be confined in the penitentiary not less than one nor more than five years, and be fined not exceeding five thousand dollars."

**West Virginia Code § 6B-2-5(b)(1):** "A public official or public employee may not knowingly and intentionally use his or her office or the prestige of his or her office for his or her own private gain or that of another person."

**West Virginia Code § 6B-2-5(d)(1):** "[N]o elected or appointed public official or public employee or member of his or her immediate family or business with which he or she is associated may be a party to or have an interest in the profits or benefits of a contract which the official or employee may have direct authority to enter into, or over which he or she may have control . . . ."

The individual(s) listed below have been charged to evaluate or serve as members or advisors of an evaluation committee for the solicitation as specified [\_\_\_\_\_]

By signing this form, each individual acknowledges that: (1) his or her service on the evaluation committee is not in violation of West Virginia Code § 5A-3-31, § 6B-2-5, or any other relevant code section; (2) his or her service on the evaluation committee does not create a conflict of interest with any of the participating vendors; and (3) he or she has not had or will not have contact relating to the solicitation identified above with any participating vendors between the time of the bid opening and the award recommendation without prior approval of the Purchasing Division.

Name/Title	Agency	Signature	Date

Revised February 8, 2016

# Verification Searches

## VCUST Table

- Fee and Vendor Compliance Holds
  - Search here for Unemployment Insurance and Federal Debarred
  - No checks indicates that there are no Holds for the respective agency

A  indicates that the Vendor is out of compliance with that entity.

▶ Fee and Vendor Compliance Holds

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

# Verification Searches

- Check “Prevent New Orders” Tab in VCUST

The screenshot displays the 'Disbursement Options' configuration page for a Vendor/Customer in VCUST. The left sidebar shows a navigation menu with 'Vendor/Customer' selected. The main content area is titled 'Disbursement Options' and contains the following fields:

- Category:** DIRC
- Description:** Direct Payments
- Default Type:** Check
- Default Priority:** 99
- Default Format:** REG
- Default Format Description:** (empty)
- Scheduled Payment Day:** (empty)
- Single Payment Indicator:**
- Name on Check:** Legal Name
- Hold Payment:**
- Hold Payment Authorized By:** (empty)
- Hold Payment Authorized On:** (empty)
- Hold Reason:** (empty)
- Prevent New Spending:** (empty)
- Prevent New Orders:** For All Departments
- Third Party Code:** (empty)
- Third Party Name:** (empty)
- Third Party Approved By:** (empty)
- Third Party Approved On:** (empty)
- Third Party Reason:** (empty)
- Always Infer Third Party Vendor:**
- Third Party Address ID:** (empty)

# Verification Searches Secretary of State

West Virginia Secretary of State  
Mac Warner

West Virginia Secretary of State — Online Data Services

Business and Licensing

Administrative Law Business & Licensing Elections Miscellaneous

Home | Login | Print

### Business & Licensing

#### Business Organization Search

SEARCH TIPS: If you have trouble finding a business, try the following:

1. Enter one or more key words in the business name
2. Use the % symbol for a wild card search.  
Example: searching for Fraternal Order Eagles 1234 ABCD, Inc.  
%Fraternal%1234%
3. The search will NOT return any organizations that are sole proprietors, as they are not filed with the Secretary of State's Office. They are filed with the West Virginia State Tax Department. To verify if an organization is a sole proprietor and/or has a business registration call the West Virginia State Tax Department at 304-558-8683.

Organization

Agent/Officer/Name

Show Advanced Search Options

Search Reset

Matching records found: 1. Please note that the results are broken into four results types: *Org Name*, *Doing Business As*, *Name Change* and *Name Registrations/Reservations*. You may use the following four links to see the results for each type.

View search results by: [Org Name](#) | [DBA](#) | [Name Change](#) | [Registrations/Reservations](#)

Organization Results								
Organization Name	Org Id	Org Type	Effective Date	Established Date	Termination Date	Termination Reason	Charter	Class
<input type="text" value="CARPETING UNLIMITED, INC."/>	162219	C	12/26/1995				Domestic	Profit
Organization Name	Org Id	Org Type	Effective Date	Established Date	Termination Date	Termination Reason	Charter	Class

# Verification Searches

## West Virginia Debarred Vendor List

- Purchasing Division maintains a West Virginia Debarred Vendor List
  - Be aware of who these vendors are
- Don't forget to check the Federal debarment site as well, at SAM.gov

West Virginia Purchasing Division

# Debarred Vendor List

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

Pursuant to *West Virginia Code §5A-3-33c*, below is a list of vendors who are currently debarred from doing business with the State of West Virginia.

Wallpapers In Stock, Inc.  
1600 Kanawha Boulevard West  
Charleston, WV 25362

Debarment Date: January 6, 2012

Clark A. Diehl  
P.O. Box 20003  
Charleston, WV 25362

Debarment Date: January 6, 2012

Gerry E. Barton  
Route 1, Box 185  
Valls creek, WV 24815

Debarment Date: February 23, 2011

Questions regarding debarred vendors should be directed to:

West Virginia Purchasing Division  
2019 Washington Street, East  
Post Office Box 50130  
Charleston, West Virginia  
25305-0130  
USA

Telephone (304) 558-2306

To check the federal debarment and suspension lists, use the [Excluded Parties List System](#).

# Protest Period

- Two Types
  - Specifications
    - Must be submitted in writing to the Purchasing Director at least five days before the bid opening
  - Award
    - Must be submitted in writing to the Purchasing Director within five days of the award of the contract / purchase order
- Protests have not been delegated to the agency. All protests, regardless of dollar amount, should be directed to the Purchasing Division. A protest incorrectly delivered to the spending unit will not be considered received until it reaches the Purchasing Division.

# Purchase Order Approval and Encumbrance

- Approval –
  - Document approved through levels in workflow
  - Buyer initials and sends contract file to Buyer Supervisor/Assistant Director/Director for review and approval
  - Purchase Order reviewed by Business and Technical Services (BTS) section to check form and ensures the agency has the appropriate funds to make the specific purchase
  - Purchase Order sent to the Attorney General's Office for review and approval as to form
  - Returned to BTS section for final approval and encumbrance of the contract
- Contract commencement
  - Encumbrance date is the earliest date a vendor may commence work
  - No vendor should begin any work until an encumbered contract has been processed by the Purchasing Division



# Vendor Performance

## How to address vendor problems related to contracts?

- When a vendor fails to meet contract requirements satisfactorily, the agency is encouraged to contact that vendor and voice its concerns
- The agency must document all efforts made to resolve the problem
- If multiple attempts to resolve the issue have failed, the agency's designated procurement officer should prepare the Vendor Performance (WV-82) form and submit it to the Purchasing Division buyer with supporting documentation/correspondence
- Agency will be advised of any action or resolution

# Resources

- Purchasing Division Procedures Handbook
  - [www.state.wv.us/admin/purchase/Handbook](http://www.state.wv.us/admin/purchase/Handbook)
    - Section 3 – Acquisition Planning
    - Section 5 – Agency Delegated Acquisition Procedures (Purchases \$50,000 or Less)
    - Section 6 – Formal Acquisition Procedures (Purchases Exceeding \$50,000)
    - Appendix B – The Purchasing Decision Path
    - Appendix A – Mandatory Pre-Bid Sign-in sheet
    - Appendix E – Agency process checklists
- Agency Resource Modules
  - [www.state.wv.us/admin/purchase/training/modules.html](http://www.state.wv.us/admin/purchase/training/modules.html)
- Intranet e-Archive for Notices to Agency-Designated Procurement Officers
  - <http://intranet.state.wv.us/admin/purchase/eArchive.html>
- Purchasing Division's wvOASIS page
  - [www.state.wv.us/admin/purchase/oasis.html](http://www.state.wv.us/admin/purchase/oasis.html)



**MELISSA PETTREY,  
SENIOR BUYER**

**304-558-0094**

**MELISSA.K.PETTREY@WV.GOV**

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***Purchasing.Help@wv.gov***