
RFQ'S FROM A TO Z



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OBJECTIVES

- Define a Request for Quotations (RFQ)
- Review the elements, including attachments, needed to prepare the requisition
- Discuss the advertisement period utilizing the Vendor Self-Service within wvOASIS
- 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

■ General Overview of Request for Quotations (RFQ)

- The RFQ is the preferred method used to solicit written or electronic bids when acquiring property and services
- Contains specifications or scope of work with mandatory requirements identified with will, shall, must, minimum, maximum, and all contractual terms and conditions.
- Conformity to specifications and price are the only factors used in the evaluation process
- Used when an agency knows exactly what they need



REQUEST FOR QUOTATIONS

■ An RFQ consists of:

- Complete specifications
- Required delivery or service dates
- Bid price per unit; commodity line type ITEM or SERVICE; catalog, percentage discount or mark-up
- Any applicable maintenance
- Any applicable pre-approvals
- 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
- Instructions to Bidders and Master Terms and Conditions



DEVELOPING SPECIFICATIONS

Types of specification formats

The One-Time Purchase format is used for a one-time purchase of a commodity that is shipped from the vendor and delivered to the agency.

The Services format is used when the vendor will perform a service. Language is included regarding qualifications, performance, travel expenses, and facility access.

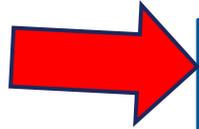
The Open-End format is used for a master agreement with a fixed price where multiple orders will be placed throughout the year.



DEVELOPING SPECIFICATIONS

The screenshot shows the website state.wv.us/admin/purchase/. The browser's address bar and tabs are visible at the top. The main content area features a banner for "News, Events, & Job Opportunities" with a scenic background. Below the banner are five blue buttons: "Vendor Resource Center", "Agency Resource Center", "Emergency Purchasing Procedures", "State Debarment", and "Contact Us". On the left side, there is a vertical navigation menu with the following items: News, Vendor Registration, Bid Information, Transparency, Procedures, Contracts, Training, Programs, Forms, Local Government Outreach, Site Map, and Resources. A large red arrow with a blue outline points to the "Forms" item in this menu. To the right of the menu is a photograph of a person's hand holding a document in front of a printer.

DEVELOPING SPECIFICATIONS



Templates

1. [Catalog Discount RFQ](#)
2. [Construction Specifications](#)
3. [Construction Specification without AIA Documents](#)
4. [Elevator Maintenance](#)
5. [Expression of Interest \(for Architectural and Engineering services\)](#)
6. [HVAC Maintenance](#)
7. [One-Time Purchase RFQ](#)
8. [Open-End RFQ](#)
9. [Request for Information \(RFI\)](#)
10. [Request for Proposal \(RFP\)](#)
11. [Services RFQ](#)
12. [Software Maintenance and Support Specification](#)
13. [Standardization \(RFI\)](#)



DEVELOPING SPECIFICATIONS

Several sets of templates related to procurement transactions have been developed and are MANDATORY for use by state agencies to streamline processing transactions

TEMPLATES AVAILABLE FOR USE

Request for Proposal (RFP) Standard Format	Services Request for Quotation (RFQ) Standard Format
Expressions of Interest (EOI) Standard Format	Elevator Maintenance Standard Format
Catalog Discount Request for Quotation (RFQ) Standard Format	HVAC Maintenance Standard Format
One-Time Purchase Request for Quotation (RFQ) Standard Format	Software Maintenance and Support
Open-End Request for Quotation (RFQ) Standard Format	Construction Specifications (with and without AIA documents)

DEVELOPING SPECIFICATIONS

- What are some consequences of poorly written specifications?
 - Prior to award
 - Protest of Specifications
 - No bidders
 - Large Amount of Vendor Questions
 - After the award
 - Protest of Award
 - Disagreement with vendor about when or what to provide



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)
- Insurance Requirements (general liability, 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>



PREPARING THE REQUISITION: SPECIAL FORMS

■ Special Forms

- HIPAA Business Associate Addendum (BAA)– only applies when the vendor will have access to protected health information
- Software as a Service Addendum
- Federal Funds Contract Clause Addendum



PREPARING THE REQUISITION

- For procurements greater than \$50,000, or \$100,000

- Types

- o Centralized Standard Requisition (CRQS) –

- Fixed Amount (i.e. for a CCT, CMA, CPO final product)

- o Centralized Master Agreement Requisition (CRQM) –

- Open-end/Master agreement (i.e. for a CMA or CCT final product)

- o Delivery Orders – ADO/CDO –

- Always refer to the ordering instructions prior to issuance

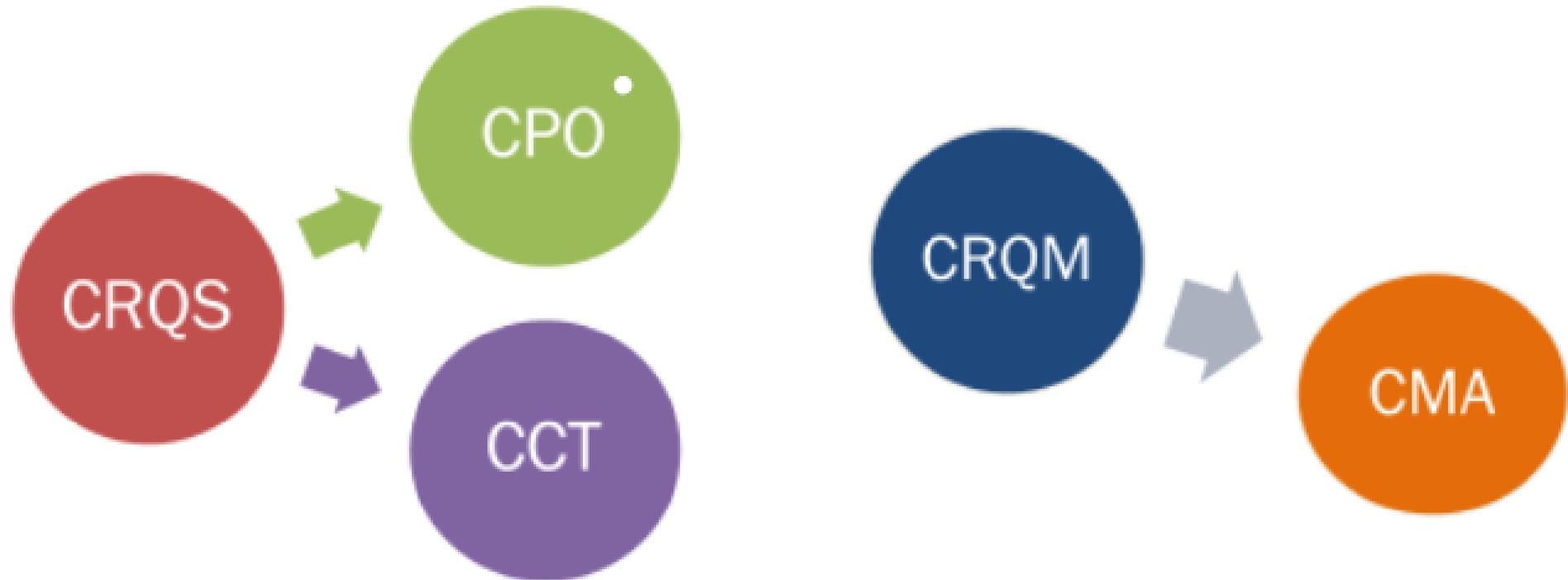
- “A” versus “C” documents

- o Agency level documents start with “A”



PREPARING THE REQUISITION

- ▶ Know the end wvOASIS award document type needed (CPO, CCT, or CMA) and utilize the appropriate requisition type to get there (CRQS or CRQM)



CREATING A REQUISITION

wwOASIS PRD FIN

Document Catalog

Message Center

- Inbox
- Alerts
- Broadcasts
- Worklist
- Forms
- Collaboration

Search

- Page Search
- Document Catalog
- Report Search

History

Favorites

Administration

Document Catalog

Create

Document Identifier

Code: CRQS Unit: 0213

Dept: 0213 ID: PUR

User Information

Document State

Browse Clear

Action Menu

Open Validate Submit Copy

<input type="checkbox"/>	Code	Dept.	Unit	ID	Comments	Version	Function	Phase	Status	Date	User ID	Amount	Active	Collaboration
--------------------------	------	-------	------	----	----------	---------	----------	-------	--------	------	---------	--------	--------	---------------

First Prev Next Last Export to CSV Show Lines: 10

Menu

CREATING A REQUISITION

wwOASIS PRD FIN

- Message Center
 - Inbox
 - Alerts
 - Broadcasts
 - Worklist
 - Forms
 - Collaboration
- Search
- History
- Favorites
- Administration

Document Catalog

[Search](#)

▼ **Document Identifier**

Code :  Unit :

Dept. : ID :

▼ **Other Options**

Auto Numbering :

Create

[Create](#)

[Menu](#)



CREATING A REQUISITION

Document Navigator [X]

- Header
- Accounting Distribution
- Vendor
- Commodity Group
- Commodity
- Accounting
- Posting
- Special Instructions
- Free Form Vendors

Header

General Information | Contact | Extended Description | Additional Information | Default Shipping/Billing | Document Information | Reporting

Document Name:	<input type="text"/>	Accounting Profile:	<input type="text"/>
Record Date:	<input type="text"/>	PCard ID:	<input type="text"/>
Budget FY:	<input type="text"/>	PCard Exp:	<input type="text"/>
Fiscal Year:	<input type="text"/>	Procurement Folder:	<input type="text"/>
Period:	<input type="text"/>	Procurement Type ID:	<input type="text" value="B"/>
Document Description:	<input type="text"/>	Procurement Type:	Central Purchase Order
Document Short Description:	<input type="text"/>	Vendor Registration Exemption:	<input type="text"/>
Actual Amount:	\$0.00	Tracking Number:	<input type="text"/>
Closed Amount:	\$0.00	Warehouse:	<input type="text"/>
Closed Date:		Total of Header Attachments:	0
Open Amount:	\$0.00	Total of All Attachments:	0
Ref Amount:	\$0.00	Maximum Budgeted Amount:	<input type="text"/>



CREATING A REQUISITION

■ Attaching the requisition documents

Header

List View

General Information | Contact | Extended Description | Additional Information | Default Shipping/Billing | Document Information | Reporting

Document Name:

Record Date:

Budget FY:

Fiscal Year:

Period:

Document Description:

Document Short Description:

Accounting Profile:

PCard ID:

PCard Exp:

Procurement Folder:

Procurement Type ID: 8

Procurement Type: Central Purchase Order

Vendor Registration Exemption:

Tracking Number:

Warehouse:

Actual Amount: \$0.00

Closed Amount: \$0.00

Closed Date:

Open Amount: \$0.00

Ref Amount: \$0.00

Total of Header Attachments: 0

Total of All Attachments: 0

Maximum Budgeted Amount:

Save | Undo | Load Accounting Profile | Load Vendor List | Ship/Bill To Lines | Reset Buyer | View | Attachments

Copy | Validate | Submit | Discard | View PDF | Print | Processing | Workflow | File | Close

Archive | SendPage | Download Document | Attachments

CREATING A REQUISITION

- Adding a vendor with an Oasis Vendor Customer Number

The screenshot displays a software interface for creating a requisition. On the left is a 'Document Navigator' sidebar with a tree view containing: Header, Accounting Distribution, Vendor (highlighted), Commodity Group, Commodity, Accounting, Posting, Special Instructions, and Free Form Vendors. The main window is titled 'Vendor' and shows 'Vendor Customer: none' and 'Legal Name: none'. It features a table with columns for 'Line Number', 'Vendor Customer', and 'Legal Name'. Below the table is a 'Vendor' tab with an 'Additional Information' sub-tab. The form contains several input fields: Vendor Customer, Legal Name, Alias/DBA, Address Code, Fax, Fax Extension, Web Address http://, Vendor Contact ID, Vendor Contact Name, Vendor Contact Phone, Vendor Contact Phone Ext., and Vendor Contact Email. A red arrow points to the 'Insert New Line' button in the bottom toolbar. Other buttons include 'Insert Copied Line', 'Edit with Grid', 'Copy', 'Validate', 'Submit', 'Discard', 'View PDF', 'Print', 'Processing', 'Workflow', 'File', and 'Close'.

CREATING A REQUISITION

- Should suggest three potential vendors qualified to bid on the solicitation. Gain vendors through market research, supplier's catalogs, internet searches, and *wv*OASIS
- Vendors may be added by using their Oasis Vendor Customer Number
- Free Form allows you to add a vendor to a requisition who may not be registered for a specific commodity code; adding to free form will ensure they will be notified of the solicitation



CREATING A REQUISITION

Document Navigator [X]

- Header
- Accounting Distribution
- Vendor**
- Commodity Group
- Commodity
- Accounting
- Posting
- Special Instructions
- Free Form Vendors

Vendor Vendor Customer: 000000106660 Legal Name: MARSHALL UNIV 10037745

Line Number	Vendor Customer	Legal Name
1	000000106660	MARSHALL UNIV 10037745

From 1 to 1 Total: 1 First Previous Next Last Show Lines: 10 Go to line: Go Export to CSV List View

Vendor Additional Information

Vendor Customer:

Legal Name: MARSHALL UNIV 10037745

Alias/DBA:

Address Code:

1 JOHN MARSHALL DR
HUNTINGTON
WV
257550002
US

Fax:
Fax Extension:

Web Address http://:

Vendor Contact ID:

Vendor Contact Name:

Vendor Contact Phone:

Vendor Contact Phone Ext.:

Vendor Contact Email:

Save Undo Insert New Line Insert Copied Line Edit with Grid

Copy Validate Submit Discard View PDF Print Processing Workflow File Close

CREATING A REQUISITION

■ Adding a Free Form Vendor

Document Navigator [X]

- Header
- Accounting Distribution
- Vendor
- Commodity Group
- Commodity
- Accounting
- Posting
- Special Instructions
- Free Form Vendors**

Free Form Vendors Total Lines: 0 Line Number: none Vendor Name: none

Line Number	Vendor Name
From 0 to 0 Total: 0	

First Previous Next Last Show Lines: 10 Export to CS

Free Form Vendors

Line Number:

Added Using:

Vendor Name:

Business Types:

Address 1:

Address 2:

City:

County Code:

County:

State Code:

State:

Principal Contact:

Telephone Number:

Fax Number:

Email Address:

Correspondence Type:

Comments:

CREATING A REQUISITION

■ Creating an Oasis Commodity Line

Document Navigator

- Header
- Accounting Distribution
- Vendor
- Commodity Group
- Commodity**
- Accounting
- Posting
- Special Instructions
- Free Form Vendors

Commodity Total Lines: 0 Line Number: none Item Total Amount: none Open Amount: none

Line Number	CL Description	Item Total Amount	Open Amount	Closed Amount
From 0 to 0 Total: 0				

First Previous Next Last Show Lines: 10 Export to CSV List View

General Information Reference Shipping/Billing Specifications Tolerance Additional Information

CL Description:

Commodity:

Stock Item Suffix:

Line Type:

Quantity:

Unit:

Unit Price:

List Price:

Contract Amount:

Discounted Unit Price:

Service From:

External Warehouse:

Fixed Asset:

Commodity Specs:

Inactive Line:

Lock Order Specs:

No Code Description:

Extended Description:

Non-Reserved Funding Open Amount Total:

Item Sub Total:

Insert New Line Insert Copied Line Edit with Grid **Related Actions**

Copy Validate Submit Discard View PDF Print Processing Workflow File Close

CREATING A REQUISITION

Commodity			
Total Lines: 1	Line: 1	Commodity: 72000000	Line Amount: \$0.00
Line	CL Description	Line Amount	Inactive Line
1	Building and Facility Construction and Maintenance Services	\$0.00	No
From 1 to 1 Total: 1			
First Previous Next Last			
Show Li			
General Information Reference Shipping/Billing Specifications Templates Add Templates Line Item Preference			
CL Description: Building and Facility Construction and Maintenance Services		Catalog: <input type="text"/>	
Commodity: 72000000		Effective From: <input type="text"/>	
Building and Facility Construction and Maintenance Services		Effective To: <input type="text"/>	
Line Type: Service <input type="text"/>		Inactive Line: <input type="checkbox"/>	
Quantity: <input type="text"/>		Lock Order Specs: No <input type="text"/>	
Unit: <input type="text"/>		Commodity Specs: This segment includes services associated with the construction and maintenance of facilities, buildings, structures, roads and <input type="text"/>	
Unit Price: <input type="text"/>		Ext Description: As per Pricing page: Enter the Grand Total Amount here on the commodity line. Vendors must fill out the pricing page in its entirety and return with their bids. <input type="text"/>	
Contract Amount: \$0.00		Line Amount: \$0.00	
Service From: <input type="text"/>		Award Date: <input type="text"/>	
Service To: <input type="text"/>			
Fixed Asset Number: <input type="text"/>			
Fixed Asset Description: <input type="text"/>			

CREATING A REQUISITION

■ wvOASIS Commodity line

- CL Description is what is being purchased
- Commodity (commodity code) is the UNSPSC number. If unsure of what commodity code to use, agencies may search on UNSPSC website at <https://www.unspsc.org>
- Line Type (Service or Item)
- Quantity-enter the estimated quantity for open-end, exact quantity for one-time purchase
- Extended Description provides additional information of product or service



CREATING A REQUISITION

- Bid Scenario Pricing
- Exhibit A (Typically used when purchasing 25)
 - 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	\$ -
				Total Bid Amount	\$ -

BLACKOUT PERIOD BEGINS

■ 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 must go through the agency's assigned Purchasing Division buyer



CREATING THE RFQ

- 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 in wvOASIS

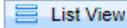


CREATING THE RFQ

Centralized Master Agreement Non-Actg(CRQM) Dept: 0506 ID: BPH230000001 Ver.: 1 Function: New Phase: Pending Modified by arnesb1 , 08/16/2023

Document Navigator 

- Header
- Accounting Distribution
- Vendor
- Commodity Group
- Commodity
- Accounting
- Posting
- Special Instructions
- Free Form Vendors

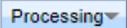
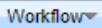
Header @ 5 

General Information | Contact | Extended Description | Additional Information | Default Shipping/Billing | Document Information | Reporting

Document Name:	Fire System Testing, Inspections & Corrective Maint.	PCard ID:	<input type="text"/>
Record Date:	<input type="text"/>	PCard Exp:	<input type="text"/>
Budget FY:	<input type="text"/>	Accounting Profile:	<input type="text"/>
Fiscal Year:	<input type="text"/>	Procurement Folder:	1216478
Period:	<input type="text"/>	Procurement Type ID:	7
Document Description:	Fire Suppression System - Open End	Procurement Type:	Central Master Agreement
Document Short Description:	<input type="text"/>	Vendor Registration Exemption:	<input type="text"/>
Actual Amount:	\$0.00	Tracking Number:	<input type="text"/>
Closed Amount:	\$0.00	Warehouse:	<input type="text"/>
Closed Date:		Total of Header Attachments:	5
Open Amount:	\$0.00	Total of All Attachments:	5
Ref Amount:	\$0.00	Maximum Budgeted Amount:	\$250,000.00



Load Vendor List | Ship/Bill To Lines | Reset Buyer | View Procurement Folder

 Copy  Discard  Approve  Reject  View PDF  Print  Processing  Workflow  File  Close

CREATING THE RFQ

Centralized Master Agreement Non-Actg(CRQM) Dept: 0506 ID: BPH230000001 Ver.: 1 Function: New Phase: Final Modified by rinkr1 , 08/24/2023

Document Navigator

- Header
- Accounting Distribution
- Vendor
- Commodity Group
- Commodity
- Accounting
- Posting
- Special Instructions
- Free Form Vendors

Header 5

List View

General Information | Contact | Extended Description | Additional Information | Default Shipping/Billing | Document Information | Reporting

Document Name:	Fire System Testing, Inspections & Corrective Maint.	PCard ID:	
Record Date:	08/24/2023	PCard Exp:	
Budget FY:	2024	Accounting Profile:	
Fiscal Year:	2024	Procurement Folder:	1216478
Period:	2	Procurement Type ID:	7
Document Description:	Fire Suppression System - Open End	Procurement Type:	Central Master Agreement
Document Short Description:		Vendor Registration Exemption:	
Actual Amount:	\$0.00	Tracking Number:	
Closed Amount:	\$0.00	Warehouse:	
Closed Date:		Total of Header Attachments:	5
Open Amount:	\$0.00	Total of All Attachments:	5
Ref Amount:	\$0.00	Maximum Budgeted Amount:	\$250,000.00

Load Vendor List | Ship/Bill To Lines | Reset Buyer | View Procurement Folder

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



CREATING THE RFQ

Copy Forward

From Document

Category : PROC Doc Dept : 0506
Type : RQ Doc Unit : 2936
Code : CRQM ID : BPH2300000001
Select Entire Document : Version : 1

To Document

Doc. Department Code : 0506 Document Id : BPH
Unit Code : 2936 Auto Numbering :

Target Doc Type	Target Doc Code	Description
SO	CRFI	Solicit Requisition
SO	CRFP	Solicit Requisition
<input checked="" type="checkbox"/> SO	CRFQ	Solicit Requisition
SO	CSSD	Solicit Requisition
MA	CMA	Create Master Agreement

First Prev Next Last

OK Cancel



CREATING THE RFQ

Header

List View

General Information | Contact | Templates | Add Templates | Modification | Reference Documents | Document Information | Additional Information

Record Date:

Document Description:

Vendor List Restricted Access to Solicitations?:

Vendor List Restricted Responses?:

Prohibit Online Responses:

Restrict Public Access Ask Questions:

Bid Receiving Location:

Attention: BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON
WV
25305
US

Procurement Folder:

Procurement Type ID:

Procurement Type: Agency Purchase Order

Default Form:

External Template Name:

Solicitation Category:

Service - Misc

System Gen List: No

Let Date:

Published Date:

Published Time:

Close Date:

Close Time:

Save | Undo | Refresh T and C | Load Vendor List | Load T and C | Load Schedule of Events | Assemble Document | Reset Buyer | View Assembly Request | View

Copy | Validate | Submit | Discard | View PDF | Print | Processing | Workflows | File | Close

Archive | SendPage | Download Docur | Attachments

CREATING THE RFQ

Schedule of Events

■ Pre-Bid Conference

- Meeting between vendors and agency personnel for solicitations that are complex and high dollar in nature
- Typically used for construction services so vendors may view the site
- Explains and clarifies critical aspects of a solicitation
- Eliminates misunderstanding and permits vendor input
- Mandatory
 - Only vendors who attended the mandatory pre-bid may be evaluated for award
- See Appendix A in Handbook for sign-in sheet



CREATING THE RFQ

■ Adding the Schedule of Events

Centralized Request for Quote(CRFQ) Dept: 0705 ID: LOT2300000005 Ver.: 1 Function: New Phase: Final Modified by welchto3 , 08/08/2023

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

Schedule of Events Total Lines: 2 Line: 1 Line: 1

Line	Sequence	Days	Event Code	Event Name	Event Date	Inactive Line	AttachmentList
1	1	0	PBID	Mandatory Pre-bid at 10:00	08/22/2023	No	
2	2	0	QUES	Questions are due by 4:00 p.m.	08/29/2023	No	

From 1 to 2 Total: 2

First Previous Next Last

Go to line: Go

CE
asing

CREATING THE RFQ

■ Attaching the terms and conditions

The screenshot displays a software interface for creating an RFQ. On the left is a 'Document Navigator' sidebar with a list of menu items: Header, Schedule of Events, Terms and Conditions (highlighted), Commodity Group, Commodity, Commodity T & C, Evaluation Criteria Group, Evaluation Criteria Line, Vendor List, Free Form Vendor, Vendor Rotation, Commodity E-mail Push, Publishing, and Supporting Documents.

The main window is titled 'Terms and Conditions' and shows 'T & C: none' and 'Name: none'. It features a table with columns: Section, T & C, Name, Inc By, and Free Form Flag. The table is currently empty, displaying 'From 0 to 0 Total: 0' and navigation buttons (First, Previous, Next, Last). A 'Show Lines:' dropdown is visible on the right.

Below the table is a form for editing terms and conditions. The form includes the following fields and controls:

- T & C:
- Name:
- Section:
- Inc By:
- Sequence:
- Required?:
- T&C Last Updated Date:
- Details:
- Inactive Line:

At the bottom of the interface, there is a toolbar with the following buttons: Insert New Line (highlighted with a red arrow), Insert Copied Line, Edit with Grid, Copy, Validate, Submit, Discard, View PDF, Print, Processing, and Work.

CREATING THE RFQ

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
Select	A1	Agency Terms and Conditions	ADV135242726	1	AGENCY_TERMS_AND_CONDITIONS.XML
Select	A2	Agency A&E Additional T & C	ADV100009105	1	AGENCY_A&E_ADDITIONAL_TERMS_AND_CONDITIONS.XML
Select	A3	Agency Const. Additional T&C	ADV100009106	1	AGENCY_CONSTRUCTION_CONTRACTS_ADDITIONAL_T_AND_C.XML
Select	ATTACH	T & C Attached	ADV100352319	1	ATTACHED_ADDITIONAL_T_AND_C.XML
Select	BLANK	Revised Blank	ADV100505475	1	REVISED-BLANK.XML
Select	C1	Central Terms and Conditions	ADV100009107	1	CENTRAL_TERMS_AND_CONDITIONS.XML
Select	C2	Central A&E Additional T & C	ADV100009108	1	CENTRAL_A&E_ADDITIONAL_TERMS_AND_CONDITIONS.XML
Select	C3	Central Constr Additional	ADV100009109	1	CENTRAL_CONSTRUCTION_CONTRACTS_ADDITIONAL_T_AND_C.XML
Select	OONV	Conversion Default		0	

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



CREATING THE RFQ

- The commodity line will copy forward from the requisition (CRQM or CRQS)

The screenshot displays a software interface for creating an RFQ commodity line. On the left is a 'Document Navigator' sidebar with a tree view containing items like 'Header', 'Schedule of Events', 'Terms and Conditions', 'Commodity Group', 'Commodity' (highlighted), 'Commodity T & C', 'Evaluation Criteria Group', 'Evaluation Criteria Line', 'Vendor List', 'Free Form Vendor', 'Vendor Rotation', 'Commodity E-mail Push', 'Publishing', and 'Supporting Documents'.

The main window title is 'Commodity' and shows 'Total Lines: 1 Line: 1 Commodity: 25102100 Line Amount:'. Below the title is a table with columns: 'Line', 'CL Description', 'Line Amount', 'Inactive Line', and 'AttachmentList'. The table contains one row: '1', 'test', 'No', and an attachment icon. Below the table are navigation buttons: 'First', 'Previous', 'Next', 'Last', 'Show Lines: 10', 'Go to line: []', 'Go', and 'Export to CSV'. A 'List View' button is also present.

Below the table are several tabs: 'General Information', 'Reference', 'Shipping/Billing', 'Specifications', 'Templates', 'Add Templates', and 'Line Item Preference'. The 'General Information' tab is active and contains the following fields:

- CL Description: test
- Commodity: 25102100 (with a green up arrow icon)
- Truck tractors
- Line Type: Item (dropdown)
- Quantity: []
- Unit: [] (with a green up arrow icon)
- Unit Price: []
- Contract Amount: []
- Service From: [] (with a calendar icon)
- Service To: [] (with a calendar icon)
- Catalog: []
- Effective From: [] (with a calendar icon)
- Effective To: [] (with a calendar icon)
- Inactive Line:
- Lock Order Specs: No (dropdown)
- Commodity Specs: []
- Ext Description: []
- Line Amount: []

At the bottom of the window is a toolbar with buttons: 'Save', 'Undo', 'Insert New Line', 'Insert Copied Line', 'Edit with Grid', 'Load T & C Commodity', 'Additional Extended Description', 'Copy', 'Validate', 'Submit', 'Discard', 'View PDF', 'Print', 'Processing', 'Workflow', 'File', and 'Close'.

CREATING THE RFQ

■ 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
- Publishing**
- 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"/>		

ADVERTISING THE RFQ

■ Advertisement of RFQ in Vendor Self Service (VSS) within wvOASIS

- The solicitation will be advertised in the West Virginia Purchasing Bulletin, accessible to vendors through the Vendor Self Service in wvOASIS
- Vendors suggested by the Agency will be notified of the solicitation by an emailed letter

MARK D. SCOTT
ABINET SECRETARY

STATE OF WEST VIRGINIA
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON STREET, EAST
CHARLESTON, WEST VIRGINIA 25305-0130

W. MICHAEL SHEETS
DIRECTOR

State of West Virginia Bid Opportunity

Solicitation Type	CRFQ
Solicitation No.	CSE2400000001
Description:	New Hire Services
Deadline for Q&A:	08/24/2023 at 10:00 AM ET
Mandatory Bid Conference:	
Bid Closing Date and Time:	09/07/2023 at 1:30 PM ET

Dear Potential Bidder:

Your business has been identified as a potential vendor by the requesting agency for the solicitation noted above.

Should your business be interested in this bid opportunity, please visit www.wvOASIS.gov, and click on the Vendor Self Service (VSS) Portal. At the welcome screen, please review any announcements and log into your account or click on the "Public Access" button in the bottom left of the page in order to view the *West Virginia Purchasing Bulletin*. At the *West Virginia Purchasing Bulletin* page, you may view all bid opportunities or you may search for the solicitation noted above by typing the solicitation number in the "keyword search" box. All modifications to solicitations prior to award will be noted as an "addendum" and also available at this same location.



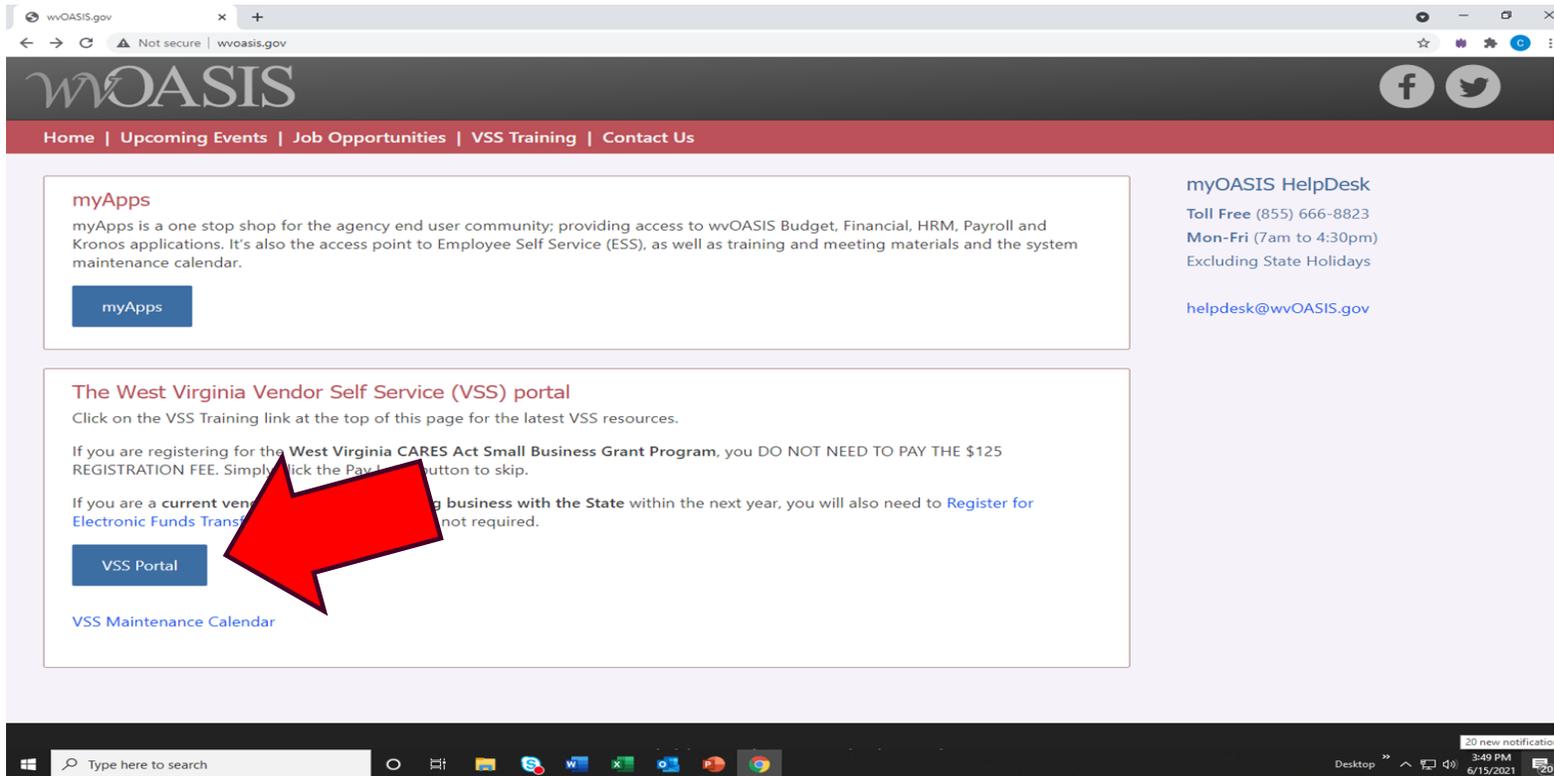
ADVERTISING THE RFQ

■ Bid opening date and time –

- Purchasing Division offices, Monday – Friday at 1:30 pm (13:30)
- Agencies should avoid using this bid opening time for agency delegated solicitations
- Be mindful of holidays and allowing vendors ample time to respond to solicitations



AFTER THE RFQ IS PUBLISHED: HOW TO VIEW SOLICITATION IN VSS



The screenshot shows the wvOASIS.gov website. The navigation bar includes links for Home, Upcoming Events, Job Opportunities, VSS Training, and Contact Us. The main content area features a 'myApps' section with a 'myApps' button and a 'The West Virginia Vendor Self Service (VSS) portal' section. The VSS portal section contains text about registration fees and a 'VSS Portal' button, which is highlighted with a large red arrow. Below the VSS Portal button is a link for 'VSS Maintenance Calendar'. 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 browser's address bar shows 'wvOASIS.gov' and the Windows taskbar at the bottom displays the time as 3:49 PM on 6/15/2021.



AFTER THE RFQ IS PUBLISHED: HOW TO VIEW SOLICITATION IN VSS

West Virginia VSS

prd311.wvoasis.gov/PRDVSS1X1/Advantage4

User ID

Password

Sign In

Need an Account? [Sign Up](#)

Forgot Password?

Welcome to State of West Virginia Vendor and Sub Recipient Self Service [Helpdesk Info](#)

What would you like to do ?

- View Latest Announcements
- Create Your Vendor Account
- Download Vendor Forms
- View Published Solicitations
- View Grant Opportunities

Latest Announcements

1 - 4 of 4 Records

View per Page - 20 50 100

Page 1 of 1

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 https://iupdate.dnb.com/iUpdate/viewiupdatehome.htm , 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.

Desktop 3:50 PM 6/15/2021

Celebrating 90 Years of West Virginia Purchasing

AFTER THE RFQ IS PUBLISHED: HOW TO VIEW SOLICITATION IN VSS



WV OASIS

User ID

Password

Sign In

Need an Account?

Sign Up



[Forgot Password?](#)

Welcome to State of West Virginia Vendor and Sub Recipient Self Service

[Helpdesk Info](#)

Published Solicitations

Search

Show Me

All

Keyword Search

*NETWORKING*EQUIP*

[Show More](#)

Search

Reset



ADDENDA

- When is an addendum necessary?
 - Add, delete, or change specifications or attachments
 - Provide a copy of the pre-bid attendee list
 - Answer technical questions submitted during the bid process
 - Extend or alter dates and times
 - Any other change



ADDENDA

- What should an agency submit as part of the addendum?
 - Agency's written request for change
 - Acts as authorization for Purchasing Division to act on behalf of the agency
 - Request may include:
 - New documents, changes, or noted deletions
 - Pre-bid attendee list (if applicable)
 - Attachment with technical questions and answers
 - Revised or added sketches, drawings, charts, etc.



ADDENDA

■ How is an addendum processed?

- Agency submits request to Purchasing
- Purchasing review
- Addendum prepared by Purchasing
- New addendum documents may include:
 - wvOASIS cover sheet
 - Standard addendum form with applicable addendum category and description of modification to solicitation
 - Addendum Acknowledgement form
 - Any supporting documentation
- Addendum is published in wvOASIS for vendors to download



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

2023					
January 4	February 1	March 1	April 4	May 2	June 1
January 5	February 2	March 2	April 5	May 3	June 5
January 11	February 6	March 7	April 6	May 4	June 6
January 12	February 7	March 8	April 10	May 9	June 7
January 17	February 8	March 9	April 11	May 11	June 8
January 19	February 9	March 14	April 12	May 16	June 13
January 23	February 14	March 16	April 13	May 17	June 14
January 25	February 16	March 20	April 18	May 18	June 15
January 26	February 21	March 21	April 19	May 23	June 21
January 31	February 23	March 22	April 20	May 24	June 22
	February 28	March 28	April 24	May 25	June 26
		March 29	April 25	May 30	June 27
		March 30	April 26	May 31	June 28
			April 27		June 29

To view and print the bids, you must have Adobe Reader installed on your PC. It is a free download.



Notice: File sizes may be large. Depending on your Internet connection, bids may take several minutes or longer to download. Bids shown on this page are in no particular order. The number represents the count, not ranking.

CRFQ: 0506_MIS2300000003

- [Bid 1](#)
- [Bid 2](#)
- [Bid 3](#)
- [Bid 4](#)
- [Bid 5](#)
- [Bid 6](#)
- [Bid 7](#)
- [Bid 8](#)
- [Bid 9](#)
- [Bid 10](#)
- [Bid 11](#)
- [Bid 12](#)
- [Bid 13](#)
- [Bid 14](#)

CRFQ: 0603_MIS2300000030

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? If so, please note on the recommendation to award.
 - Only get WV-96 if alternate terms and conditions conflict with state's
- Is there firm, fixed pricing?



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



THE EVALUATION PROCESS

Friday, September 1, 2023, at 10:00 AM

Solicitation	CRFQ DOT2400000003- Stone & aggregate Delivery
--------------	--

Vendors Tied	Tie Amount
Shamblin Stone	35.80
Martin Marietta	35.80

Item tied	Class 10 Aggregate D1 <i>Haynes Branch</i>
-----------	---

Guidelines
Everyone present at the meeting will sign in on the Sign In Sheet. Once everyone has signed in the buyer will designate one vendor as "heads" (the side of the coin with a face) and the other vendor will be "tails" (the side without a face). This information will be documented in writing and will not change.

The coin will be flipped in the air and will land on the table. The side of the coin facing up will determine the winner of the tie.

Vendor	Side of Coin
Shamblin Stone	<i>H</i>
Martin Marietta	<i>T</i>

Time Coin Flipped	<i>10:00</i>
Side of Coin facing up	<i>H</i>
Winning vendor	<i>Shamblin</i>

Friday, September 1, 2023, at 10:00 AM

Solicitation	CRFQ DOT2400000003- Stone & aggregate Delivery
--------------	--

Vendors Tied	Tie Amount
Shamblin Stone	43.90
Martin Marietta	43.90

Item tied	Stones for gabions – D3 <i>Spencer</i>
-----------	---

Guidelines
Everyone present at the meeting will sign in on the Sign In Sheet. Once everyone has signed in the buyer will designate one vendor as "heads" (the side of the coin with a face) and the other vendor will be "tails" (the side without a face). This information will be documented in writing and will not change.

The coin will be flipped in the air and will land on the table. The side of the coin facing up will determine the winner of the tie.

Vendor	Side of Coin
Shamblin Stone	<i>T</i>
Martin Marietta	<i>H</i>

Time Coin Flipped	<i>10:00</i>
Side of Coin facing up	<i>H</i>
Winning vendor	<i>Martin Marietta</i>

THE EVALUATION PROCESS

Solicitation	CRFQ DOT2400000003 Stone and Aggregate Materials and Delivery by Vendor
--------------	---

Vendors Tied
* (A) Vantacore Partners
(B) Hog Lick Aggregates
(C) Ohio River Aggregates

Guidelines
 Everyone present at the meeting will sign in on the Sign In Sheet. Once everyone has signed in the buyer will place a sheet of paper on the table representing each company. The buyer will shuffle the deck of cards and place a card face up on each sheet of paper. The vendor with the highest card will win the tie breaker.

The order of cards from lowest to highest are –
 2, 3, 4, 5, 6, 7, 8, 9, 10, Jack, Queen, King, Ace (Jokers will be removed from the deck)

In the event that two or more vendors receive the same value card, a second card will be draw for each affected vendor.

District	County	Location	Item	Bid Price	Card results / Winning Vendor
7	Wetzel	New Martinsville	AASHTO #1	33.50	(A) Ace Diamonds (B) Ten Diamonds (C) Four Hearts

Form Completed by	John Estep, Senior Buyer
Signature / Date	<i>John Estep</i> 9/6/23
Witness	<i>Tara Lyle</i>
Signature / Date	<i>Tara Lyle</i> 9/6/2023



THE EVALUATION PROCESS

- **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 §148CSRI**

- **If a vendor requests to have their bid rejected**

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

- Agency has determined the awarded vendor
 - Submit a Recommendation for Award to the Purchasing Division buyer
 - <http://www.state.wv.us/admin/purchase/forms.html> (#7 under Agency Forms)
 - Check 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, why, where)
 - 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

- If awarding to “Other Than Lowest Bid”
 - List the name of the vendor and what specification was missed

[X] **Other Than Lowest Bid:** By signing below, the procurement officer certifies that bids have been properly evaluated and recommends award to Dunder Mifflin Paper Company as the lowest responsible bidder meeting the required specifications. Award to the lowest bid was not made due to disqualifications described in more detail below:

List Vendor # Name – The Michael Scott Paper Company

Reason for Disqualification/Missed specification:

Specification 3.1.1 Carton must contain a minimum of 5,000 sheets of paper.

Vendor’s carton contains 4,000 sheets of paper per their bid comments. The vendor did not meet a mandatory specification and their bid has been disqualified.



VERIFICATION SEARCHES

■ VCUST table

— Fee and Vendor Compliance Holds

- Search here for Unemployment Insurance and Federal Debarred
- “No” indicates that there are no Holds for the respective agency

▼ Fee and Vendor Compliance Holds

Fee Exempt :	<input type="checkbox"/>	Tax Clearance :	No
Registration Application Date :	02/14/2014 	Unemployment Insurance :	No
Registration Effective Date :	02/14/2014	Worker's Compensation :	No
Registration Expiration Date :	03/01/2015	Secretary of State Registration :	No
Pre-Registration Code :		Federal Debarred :	No



VERIFICATION SEARCHES

- Check “Prevent New Orders” Tab in VCUST

The screenshot displays the 'Disbursement Options' form in VCUST. The left sidebar contains a navigation menu with the following items: Close, Vendor/Customer (selected), General Info, Headquarters, Organization, Disbursement Options, Prenote/EFT, Remittance Advice, Vendor Terms, Accounts Receivable, eMALL, Location Information, Fee and Vendor Compliance Holds, Travel, and Change Management. The main form area is titled 'Disbursement Options' and contains the following fields:

- Category: DIPC
- 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)

A red arrow points from the 'Prevent New Orders' dropdown menu to the 'Prevent New Orders' text in the slide's bullet point.

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](#)

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.

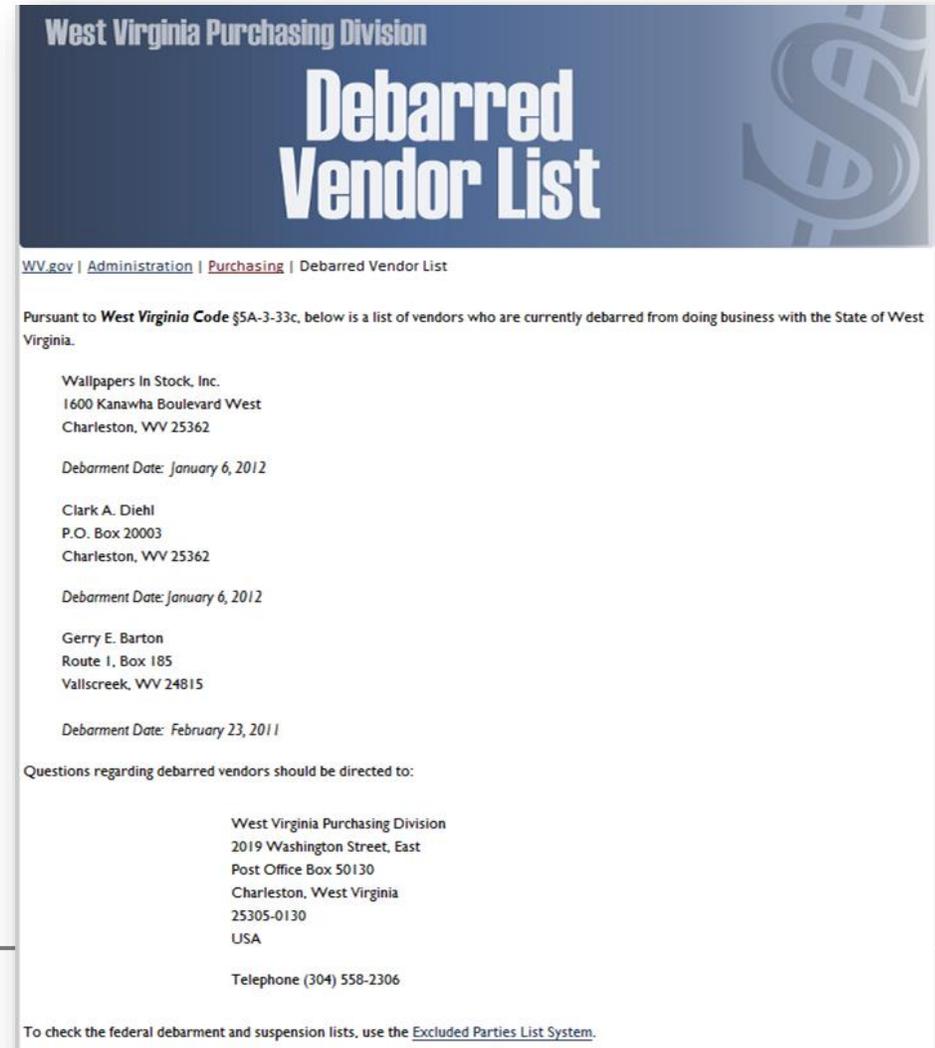
View search results by: [Org Name](#) | [DBA](#) | [Name Change](#) | [Registrations/Reservations](#)

Organization Results								
Organization Name	Org Id	Org Type	Effective Date	Established Date	Termination Date	Termination Reason	Charter	Class
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



The screenshot shows the 'Debarred Vendor List' page from the West Virginia Purchasing Division. The page header includes the division name and a large blue 'Debarred Vendor List' title with a dollar sign icon. Below the header is a navigation bar with links to WV.gov, Administration, Purchasing, and the Debarred Vendor List. The main content area states that vendors are debarred pursuant to West Virginia Code §5A-3-33c and lists three vendors with their addresses and debarment dates. A contact section provides information for questions regarding debarred vendors, including the address, phone number, and a link to the Excluded Parties List System.

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](#).

VERIFICATION SEARCHES RECOMMENDATION TO AWARD

WV-50
Rev. 1/20/2023

Manual Search Verifications: By signing below the procurement officer certifies that he or she has verified that:

- Vendor is in compliance** with the Secretary of State requirements for business registration (or is not required to register with that office or has obtained the necessary exemption), that the vendor is not identified as a debarred vendor within the Federal SAM system, and that the vendor is not listed on the West Virginia Purchasing Division's list of debarred vendors.

- Vendor is not in compliance** with the Secretary of State requirements for business registration and this will need to be remedied before contract award.

THE EVALUATION PROCESS



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

■ 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

PURCHASE ORDER APPROVAL AND ENCUMBRANCE

■ Approval –

- Document approved through levels in workflow

Track Work in Progress - CMA - 0705 - LOT2300000003 - 1

Date Submitted : 5/16/2023 Submitter : Toby L Welch

Approval Rule ID	Seq No	Approval Level	Assignment Date	Initial Assignee Name	Approval Status	Approval User Name
12145	5	5	2023-05-16	CMA Lvl 1 Dept:0705	Approved	Crystal Crouch
12145	6	6	2023-05-16	PR Central CTS1 Approver	Approved	Christopher W Seckman
12145	7	7	2023-05-16	PR Central Purchasing Buyer	Approved	Toby L Welch
12145	11	11	2023-05-16	PR Central Buyer Manager	Approved	Mark A Atkins
12145	12	14	2023-05-16	PR CTS2 Authorized Approver	Approved	Beverly A Toler
12145	13	12	2023-05-16	Attorney General Approver	Approved	Raquel L Gray
12145	14	13	2023-05-25	PR CTS2 Authorized Approver	Approved	Guy L Nisbet

[View Log](#) [View Visual](#)



PURCHASE ORDER APPROVAL AND ENCUMBRANCE

■ Approval –

- 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 shall begin any work until an encumbered contract has been processed by the Purchasing Division



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.



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

— The agency's designated procurement officer should prepare the Vendor Performance Notification Form (WV-82) form and Vendor Non-Performance/Contract Breach Demand Letter Template (WV-82A)

- 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
 - Section 3 – Acquisition Planning
 - Section 5 – Agency Delegated Acquisition Procedures (Purchases \$50,000 or Less)
 - Section 6 – Central Acquisition Procedures (Purchases Exceeding \$50,000)
 - Appendix B – The Purchasing Decision Path
 - Appendix A – Mandatory Pre-Bid Sign-in sheet (Frequently Used Links)
 - Appendix E – Agency process checklists
- Agency Resource Modules
 - www.state.wv.us/admin/purchase/training/modules.html
- Purchasing Division’s wvOASIS page
 - www.state.wv.us/admin/purchase/oasis.html



CONTACT US



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