

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

1.0 PURPOSE

The purpose of this directive is to ensure that the procurement of information technology hardware, software, and services follow the established West Virginia Office of Technology (WVOT) and WV Departments of Health (DH), Health Facilities (DHF), Human Services (DoHS), and the Office of Shared Administration (OSA) (Departments) procurement policies and guidelines, that due diligence is performed to ensure compatibility with existing systems and policies, that appropriate plans are associated with technology acquisition, and the proper approval is obtained prior to issuance of a purchase.

Reliable technology is important to maintaining smooth operations of Agency functions. Therefore, technology should be kept technically current to remain compatible with requisite capabilities, information security and privacy requirements, and technology innovation.

2.0 SCOPE

This directive applies to all employees within the Departments, and all technology resources and related services owned, used, or operated by the Departments, regardless of the source of funding, location, or intended purpose. The scope of this directive includes, but is not limited to, the following technology resources:

- Desktops, laptops, smartphones/PDAs, cell phones, tablets, CDs, flash drives, servers, etc.
- Software running on the devices mentioned above
- Peripheral equipment, such as printers, scanners, keyboards, mice
- Technology consulting, technology services, maintenance contracts, temporary IT staffing
- Network devices, such as cables or connectivity-related devices
- Audio-visual equipment, such as smart TVs and webcam/camera

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

3.0 POLICY

- 3.1 OSA Office of Management Information Services (OMIS) Procurement staff will be the liaison with WVOT on behalf of the Departments. All employees must be familiar with and comply with W. Va. Code § 5A-6-1, et seq., and WVOT Policy CIO-19-001.
- 3.2 Request Process
- 3.2.1 When submitting technology requests, employees must use the OMIS Equipment and Contract Request Form, which can be found at the following link: https://intranet.wvdhhr.org/equipment_request_form.
- 3.2.2 After the equipment request form has been completed and submitted, the requestor must send all supporting documentation/artifacts to osamispurchasing@wv.gov, and include the Equipment Request ID # in the subject line of the email. OMIS will then forward the request to either consulting.services@wv.gov or wvot.cell@wv.gov.
- 3.2.3 If the request is approved by WVOT and/or OMIS, the requestor will receive a memo or email for their records. The requestor should follow their agency/office purchasing process and state purchasing rules to complete the procurement, as well as document entry into wvOASIS, as appropriate.
- 3.2.4 If WVOT has questions regarding the request they will send them to OMIS Procurement, who will then forward them to the requestor for a response. If WVOT denies a request, OMIS will contact the requestor who must either revise and resubmit the request, if required, or obtain assistance from their department heads.

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

3.2.5 Additional information may be found in the Department of Administration Purchasing Division Procedures Handbook.

3.2.6 When submitting requests that require bids, over \$5,000.00 (verbal bids) and \$20,000.00 (written bids), requestors must submit the following to OMIS Procurement via email to osamispurchasing@wv.gov.

- Specifications (DOA – Required Purchasing Templates)
- Written and signed justification
- Estimated cost and quotes (outlined in screenshots or pdf)

3.3 Privacy Impact Assessment

3.3.1 Employees requesting the purchase of removable media (i.e., external hard drives, flash drives, or memory cards), must complete a privacy impact assessment (PIA). This form may be found at the following link: <https://privacy.wv.gov/privacyimpactassessment/Pages/default.aspx>. Please cc: osamispurchasing@wv.gov on the email to the WV Privacy Office.

3.3.2 Departments may submit the form directly to the WV Privacy Office or may request OMIS to submit the form on their behalf. However, employees must provide OMIS with all pertinent details regarding the request.

3.4 Statewide Contracts

3.4.1 When placing an order through a statewide contract, if the ordering instructions indicate that approval from WVOT is not necessary, then OMIS approval will not be required unless otherwise specified by a Department directive.

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

3.5 Exceptions to Statewide Contract Ordering Procedures

3.5.1 All Departments must submit a WV-39 form, accompanied by all required supporting information, to OMIS for any of the following:

- cell phone purchases
- cell phone account changes
- service cancellations

3.5.2 OMIS functions as the designated liaison with the WVOT Cell Phone Unit and the contracted vendor for all such requests. (see Section 3.9).

3.5.3 Technology-related items purchased from a statewide contract (SWC), including items from the office supply contract or other sources, still require OMIS approval if the item plugs in, connects to the network, or contains data storage. This requirement applies regardless of the SWC ordering procedures. OMIS approval is an internal pre-approval step and does not replace or modify the standard SWC ordering process.

3.6 Project Intake Approval (Strategic Review)

3.6.1 All new technology procurements exceeding \$250,000.00 must go through a review and approval process. Employees must complete a [Project Intake Form](#) and forward it to the WV Project Management Office.

3.6.2 Employees may contact the WVOT Intergovernmental Relations Office (IRO) at ERM@wv.gov. All inquiries will be routed to the appropriate IR manager or team member.

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

3.6.2.1 Note: The IRM may contact the employee via phone or email for further information or to provide approval. If the IRM instructs the employee to submit the request to Consulting Services, do not submit it directly to WVOT, as OMIS is responsible for the final submission on behalf of the departments.

3.6.3 If an employee is unable to complete the form for any reason, they must contact the IRM for assistance. OMIS will help the employee arrange a meeting, if needed.

3.7 WVOT policy has established a framework for all technology procurement requests that require Chief Information Officer (CIO) approval (see WVOT Policy CIO-19-001). This includes the following:

- A blanket approval list for specific software and hardware when below the \$5,000 threshold
- An expedited review request process for time-sensitive circumstances
- Requests for proposals, quotations, and information (RFP, RFQ, RFI) and other non-expedited requests
- Contracts and agreements

3.8 Waiver Request from CIO Approval

3.8.1 Departments may submit to OMIS a waiver request for technology purchases. This provision is only applicable to entities that are not connected to the State's network and are not exempted by WV State Code. OMIS will submit waiver requests to WVOT for review and consideration. OMIS will only submit waiver requests to WVOT if CIO approval is not needed.

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

3.8.2 Note: This does not remove the requirement to obtain waivers for any statewide contract. Such requests must still be submitted through OSA Purchasing and follow the employee’s unit-specific internal waiver process.

3.9 Cell Phone/Service Changes Requests

3.9.1 When requesting cell phone equipment or service changes, employees must submit the following to OMIS Procurement:

- A completed and signed WV-39, including items, service/plan, cost, and existing account number (if one exists)
- Justification (outlined either on the equipment request form or a separate written document)
- Submit through the equipment request process and email documents to osamispurchasing@wv.gov.
- Employees may speak with a statewide contract representative to answer questions or assist with service issues. However, **all cell phone orders or cancellations must be sent through OMIS.**

3.9.2 Cell Phone or Tablet Approval

3.9.2.1 Employees **must** request the lowest priced cell phone (i.e., smartphone) from the statewide contract(s).

3.9.2.2 Any variances or special requests—such as newer versions or models, increased memory, larger screens, or similar upgrades—must be approved and signed by the highest-level official within the employee’s Department. If a commissioner or deputy commissioner exists, their signature is required. Each request must include a justification memo explaining the specific

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

job-related capabilities the requested item provides that are not available in the lowest-cost option. The OSA Chief Information Officer (CIO) may request additional information and may deny such requests.

3.9.2.3 All tablet requests must be reviewed and approved by the current OSA CIO before submission to WVOTcell@wv.gov. Each request must include a justification memo signed by the highest-level official within the employee's department. If a commissioner or deputy commissioner exists, their signature is required. The memo must explain the specific job-related functions that a cellular-enabled tablet provides which cannot be met by the employee's existing laptop.

3.10 SaaS Cloud Addendum Overview

3.10.1 A Software as a Service (SaaS) addendum is required for any project in which state-owned data will be stored or processed by an application or cloud infrastructure that is owned, maintained, or managed by a service provider. Any project utilizing SaaS where state-owned data will reside or be accessible through such platforms requires WVOT review and approval.

3.10.2 The SaaS addendum must be attached to the solicitation (see Appendix D of [WVOT Policy CIO-19-001](#)). If, for some reason, the SaaS addendum is not needed, WVOT will notify the Agency.

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

3.11 Artificial Intelligence (AI) Software Guidelines

3.11.1 All AI software, including open-source AI tools, must receive prior approval from WVOT before being used in any state business or technical environment.

3.11.2 **Approved AI Software.** The following AI tools and categories are permitted for use (subject to change based on WVOT review and statewide technology standards).

- Google Gemini for Workspace
- Microsoft Copilot Chat
- Microsoft Copilot Studio — Requires CIO review
- Grammarly — Requires full license and State ID (request through OMIS)
- Gemini Apps

3.11.3 **Prohibited AI Software.** The following AI tools and categories are **not** permitted for use:

- ChatGPT
- DeepSeek
- Any AI model that transmits data outside the United States
- Any AI model prohibited under the FCC Secure Networks Act

3.11.4 For more information on the Executive Branch approach to AI see:
<https://technology.wv.gov/policy-governance/artificial-intelligence>

4.0 ENFORCEMENT

Any employee found to have violated this policy may be subject to disciplinary action. Invoices may not be processed without the proper prior approval and/or procurements may be delayed.

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

5.0 DEFINITIONS

- 5.1 **Intergovernmental Relationship Manager (IRM)** - The Intergovernmental Relationship Manager (IRM) is the Departments' dedicated point of contact within the WVOT, who is assigned to support the Departments' unique technology needs. IRMs' serve as advocates and subject matter experts, ensuring seamless communication and collaboration between the Departments and WVOT.
- 5.2 **Office of Management Information Services (OMIS)** - This office reports directly to the DH, DHF, DoHS and the OSA Cabinet Secretaries and provides the leadership, innovation, and services needed to achieve efficient and effective technology solutions to meet the goals of the Departments.
- 5.3 **Personally Identifiable Information (PII)** - All information that identifies, or can be used to identify, locate, or contact (or impersonate) a particular individual. Personally identifiable information is contained in both public and non-public records. Examples may include but are not limited to a specific individual's: first name (or initial) and last name (current or former); geographical address, electronic address (including an email address); telephone number or fax number dedicated to contacting the individual at their physical place of residence; social security number; credit and debit card numbers; financial records, including loan accounts and payment history; consumer report information; mother's maiden name; biometric identifiers, including but not limited to, fingerprints; facial recognition and iris scans; driver identification number; full face image; birth date; birth or adoption certificate number; physical description; genetic information; medical, disability or employment records, including salary information; computer information, including information collected through an Internet cookie; criminal history, etc. When connected with one or more of the

State of West Virginia
Departments of Health, Health Facilities, and Human Services
Office of Shared Administration
Office of Management Information Services
OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

items of information specified above, PII includes any other information concerning an individual, that if disclosed, identifies or can be used to identify a specific individual physically or electronically.

- 5.4 **Privacy Impact Assessment (PIA)** – A tool used to assess the privacy impact and risks to the personally identifiable information (PII) stored, used, and exchanged by information systems. A PIA evaluates privacy implications when information systems are created, when existing systems are significantly modified, or new technology is purchased.
- 5.5 **Software as a Service (SaaS)** – Refers to a cloud-based delivery model in which applications are hosted, maintained, and managed by a third-party service provider and accessed by users over the internet. SaaS solutions typically involve storing or processing data on infrastructure that is owned or operated by the provider rather than the organization.
- 5.6 **Request for Information (RFI)** - A solicitation document used to obtain general information about products, services, or suppliers. It is an information request, not binding on either the supplier or the purchaser, and is often used prior to specific requisitions for items.
- 5.7 **Request for Proposal (RFP)** - An open request for bids to complete a new project proposed by the organization that issues it. It is meant to open competition and to encourage a variety of alternative proposals that might be considered by the project's planners.
- 5.8 **Request for quotations (RFQ)** - A process where an organization asks a set of potential suppliers or service providers to submit their price quotations and stand a chance to supply or provide goods or services. Once the enterprise receives the price quotations, it can choose the vendor that best matches its criteria for the goods or services.

State of West Virginia
 Departments of Health, Health Facilities, and Human Services
 Office of Shared Administration
 Office of Management Information Services
 OMIS Directive – Technology Equipment Approval Process

Revised: January 26, 2026

5.9 **West Virginia Office of Technology (WVOT)** - The division of the Department of Administration established by WV Code § 5A-6-4a, et. seq., which is led by the State’s CIO and designated to acquire, operate, and maintain the State’s technology infrastructure. The WVOT is responsible for evaluating equipment and services, and reviewing information technology contracts.

6.0 REFERENCES/RELATED MATERIAL

6.1 WV Code § 5A-6-1 – Authority of the WV Office of Technology

6.2 WVOT Policies Issued by the Chief Information Officer (CIO)
<https://sites.google.com/wv.gov/othub/nonav/policies/cto-19-001>

6.3 WVOT Policy and Governance - Approach to Artificial Intelligence
<https://technology.wv.gov/policy-governance/artificial-intelligence>

7.0 REVISION HISTORY

Version Number	Date	Revisions
Version 1.0	11/15/2024	Issued 09/09/2024
Version 1.1	12/18/2024	Revised sections: 2.0, 3.0 and added IRM definition
Version 1.2	01/26/2026	Annual review and update; revised language to sections 2.0, 3.2, 3.3, 3.4, 3.5, 3.8, 3.9, 3.10, 5.5, 6.0; added section 3.11; updated links; revised format