


# PURCHASING POLICY EXCEPTION FORM

**FROM:**

DATE: 01-09-24  
DEPARTMENT: CAO 01201  
VENDOR: Thomson Reuters

DEPT DIRECTOR/  
MGR SIGNATURE:  DATE: 01-09-24

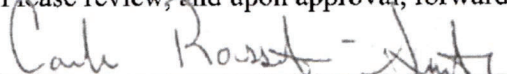
**Amount of Invoice:** \$164.56, \$164.56, and \$163.58      **Invoice Date:** 11-01-23, 12-01-23, & 01-01-24

The attached request for disbursement does not appear to be in compliance with County Purchasing Policy, for the following reason:

The contract automatically renewed at a higher rate without property notification. Upon discovery, the vendor's only solution was to enter into a new contract at the prior rate, however, that contract could only be effective upon date of processing. Corrected invoices were issued at the lower rate for the lapse between October 1, 2023 - December 27, 2023 when there was no contract in place.

**Please forward all documentation with this form attached, and letter of explanation, to the Chief Procurement Officer.**


**TO:** CHIEF PROCUREMENT OFFICER  
Please review, and upon approval, forward to County Administration.

 Date: 1/11/24

Resolution: Approved.

**To process this disbursement, the request must be approved by the County Administrator.**

**TO:** COUNTY ADMINISTRATOR  
Please review, and upon approval, forward to the Finance Department for processing.  
**APPROVED FOR PAYMENT:**

COUNTY ADMINISTRATOR (or designee):   
DATE: 1/17/24

**APPROVED FOR PAYMENT:**  
FINANCE DIRECTOR/  
ASST. FINANCE DIRECTOR:  Date: \_\_\_\_\_

71249

# Invoice



Thomson Reuters  
West Publishing Corporation  
610 Opperman Drive  
Eagan, MN 55123-1396

## HERNANDO COUNTY ATTORNEY

Invoice #: 849366811-1  
Account #: 1003989296  
Invoice date: December 1, 2023  
Purchase order #:

HERNANDO COUNTY ATTORNEY  
20 N MAIN ST RM 462  
BROOKSVILLE, FL 34601-2893

|                          |
|--------------------------|
| Total Due in USD         |
| <b>164.56</b>            |
| Payment Due by           |
| <b>December 31, 2023</b> |

| Summary                              | Charge USD | Tax USD | Total USD      |
|--------------------------------------|------------|---------|----------------|
| ONLINE/SOFTWARE SUBSCRIPTION CHARGES | 172.26     | 0.00    | 172.26         |
| CREDIT APPLIED                       |            |         | 7.70CR         |
| <b>TOTAL INVOICE AMOUNT</b>          |            |         | <b>164.56T</b> |

### Billing Note

Find information on how to read your invoice and other commonly asked billing questions under the Billing, payment, returns & refunds section online at [legal.thomsonreuters.com/en/support](http://legal.thomsonreuters.com/en/support).

### Self-Service online resources

To manage your account sign up at MyAccount: <http://myaccount.lr.com/westlaw>

For online support contact us at <http://legal.thomsonreuters.com/en/support>

We reserve the right to charge a late fee for each invoice not paid by the due date. Avoid potential late fees by enrolling in Autopay at: [www.lr.com/questpay-autopay](http://www.lr.com/questpay-autopay).

1003989296 A

**Include this portion with your payment - Folding and stapling may delay your payment.**

### HERNANDO COUNTY ATTORNEY

Invoice #: 849366811-1  
Account #: 1003989296  
Invoice date: December 1, 2023

### Pay online:

To make a payment electronically log on to <https://www.lr.com/questpay-autopay>  
Set up your payment to be withdrawn electronically using direct debit or credit card.

Invoice due date: December 31, 2023  
Amount due in USD: 164.56

### Please make checks payable to:

Thomson Reuters - West  
Payment Center  
P.O. Box 6292  
Carol Stream, IL 60197-6292

Amount enclosed: \_\_\_\_\_

## Information and payment details



### Do more with your account online

#### <http://myaccount.tr.com/westlaw>

- Manage payments online and review account balances
- Update addresses and review order status
- View and download invoice details
- Manage online users' access
- Manage Autopay

#### <http://www.quickview.com>

- Obtain free usage reporting for cost recovery
- Obtain eDiscovery matter details

#### <http://ebilling.thomsonreuters.com>

- Go Green with eInvoicing for time savings and convenience

#### <https://www.tr.com/guestpay-autopay>

- Easily and quickly enroll in our Autopay program

#### <https://legal.thomsonreuters.com/billing-portal-request>

- Sign up to receive your invoice through a billing portal



### Contact us online

#### <https://legal.thomsonreuters.com/en/support>

- Provides answers to commonly asked questions and web forms for submitting account-related requests



### Thomson Reuters tax information

#### Canadian registration numbers

Canada GST/HST: 13641 8480 RT0001

British Columbia PST: PST-1000-4632

Quebec QST: 1021623993 TQ001

Saskatchewan PST: 1895663

#### VAT Reg Numbers

EU 372021573

GB 369 490 158

#### Federal Tax ID

41-1426973



### Return policy

- If you are not completely satisfied with the products you purchase from West (Thomson Reuters), you may return them. In order to receive credit, returns must be received within 45 days of the ship date. If a return is received after 45 days, we regret that we cannot issue a refund or send the merchandise back to you. The ship date can be found online at My Account (<http://myaccount.tr.com/westlaw>).
- Products included in One-time purchases and Thomson Reuters® Smart Saver - Automatic Print Updates programs can be returned up to 45 days after they're shipped for a full refund. Product returns will not interrupt or cancel current or future Thomson Reuters® Smart Saver - Automatic Print Updates.
- Please note that products included within programs such as, but not limited to, Library Maintenance Agreement/Library Management Arrangement, Library Savings Plan, West Complete, Assured Print Pricing, WestPack, and Special Offer agreements cannot be separately cancelled or returned and are nonrefundable. These programs provide our most favorable terms, and titles within these programs are not eligible for refund.
- To ensure accurate processing, simply return merchandise in its original packaging via a trackable shipping method and insure the merchandise for its value. Always enclose a copy of the original delivery or billing document and include a brief explanation of the reason for the return. All expenses associated with returns are the responsibility of the customer. Customers will forfeit any applicable discounts when returning part of a promotional sale. To verify our receipt of your return and any credit applied, access the Returns History section in My Account (<http://myaccount.tr.com/westlaw>).
- The return policy does not apply to online, hosted, software, or Thomson Reuters ProView® eBook products. Please refer to your order form.



### Payment options and terms

Include your invoice number to assist with applying your payment or email the remittance to [west.arpaymentcenter@thomsonreuters.com](mailto:west.arpaymentcenter@thomsonreuters.com)

#### Pay online

To make a payment online or sign up for Autopay, please visit

<https://www.tr.com/guestpay-autopay>

#### Electronic payments in US currency should be issued to

West Publishing Corporation

BMO Harris Bank N.A.,

320 S. Canal Street Chicago IL 60606

Bank Routing #: 071000288

Bank Account #: 4445615

SWIFT Code: HATRUS44

#### Electronic payment details for other currencies

<http://legal.tr.com/electronic-funds-transfer>

#### Pay via phone

To make a payment via telephone, please call 1-800-328-4880

Say "Account Services," then provide account number, say "make a payment."

- Terms: Net 30; products are shipped FOB shipping point
- We reserve the right to charge a late fee for each invoice not paid by the due date.
- Please do not enclose cash or additional correspondence
- Payments marked "paid in full," or with any other restrictive language, shall not operate as an accord and satisfaction without the prior written approval of West (Thomson Reuters).

# Invoice



Thomson Reuters  
West Publishing Corporation  
610 Opperman Drive  
Eagan, MN 55123-1396

HERNANDO COUNTY ATTORNEY

Invoice #: 849366811-1  
Account #: 1003989296  
Invoice date: December 1, 2023  
Purchase order #:

## Account location detail

| Product Detail  | Units | Charge USD | Tax USD | Total USD                 |
|---|-------|------------|---------|---------------------------|
| <b>1003989296</b>                                     |       |            |         |                           |
| Reference # 6157973480                                |       |            |         |                           |
| HERNANDO COUNTY ATTORNEY                              |       |            |         |                           |
| 20 N MAIN ST RM 462                                   |       |            |         |                           |
| BROOKSVILLE FL 34601-2893                             |       |            |         |                           |
| <b>Online/Software Subscription Charges</b>           |       |            |         |                           |
| November 1, 2023 - November 30, 2023                  |       |            |         |                           |
| CLEAR INVESTIGATIONS                                  |       | 95.19      | 0.00    | 95.19                     |
| November 1, 2023 - November 30, 2023                  |       |            |         |                           |
| CLEAR Incarceration Arrest Gateway, Add-seat          |       | 77.07      | 0.00    | 77.07                     |
| <b>Online/Software Subscription Charges Total USD</b> |       |            |         |                           |
|   |       |            |         | <b>Location Total USD</b> |
|   |       |            |         | <b>Total USD</b>          |

\* Indicates system credit

HERNANDO COUNTY ATTORNEY



Thomson Reuters  
West Publishing Corporation  
610 Opperman Drive  
Eagan, MN 55123-1396

## Monthly account summary

Account #: 1003989296

### Open charges as of December 1, 2023

| Document date | Document # | Description | Amount<br>USD | Notes | Due Date   |
|---------------|------------|-------------|---------------|-------|------------|
| 11/01/2023    | 0849219101 | Invoice     | 172.26        |       | 12/01/2023 |
| 12/01/2023    | 0849366811 | Invoice     | 172.26        |       | 12/31/2023 |

### Open charges in USD as of December 1, 2023

The Monthly account summary is a comprehensive report of all account activity for the current subscription billing period. Payments made within the last 48 hours may not be included. Go to <http://myaccount.tr.com/westlaw> if more details are needed around these invoices or payments.

**Pamela Hare**

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**From:** Emily Childs <echilds@hernandoclerk.org>  
**Sent:** Thursday, December 14, 2023 9:25 AM  
**To:** Carla Rossiter-Smith; Pamela Hare; Lindsey Brown; Fran Hallet  
**Subject:** RE: Accounts Payable Question for County Attorney's Office

From a financial standpoint, filling out a Purchasing Policy Exception form would be the best course of action without a contract for October and November.

Pam, after completing the form, upload the bills with the completed form, into OnBase so that they can be paid. Then we would cover October and November expenses. I would reference Pam's email as support for the reason we are only making the 7% payment. Paying at the 12% rate and holding out for a credit is not rational. It would not be simple to follow at that point because we would be combining products that are on contract with those that are on the PPE.

Presuming that the intention is to execute the agreement and issue a purchase order for December and the remaining months of the fiscal year?

Thank you,

~~Emily Childs~~

Board Accounting | Accounts Payable Manager

**NOTICE** Doug Chorvat Jr., Clerk of Circuit Court and Comptroller

Phone: (352) 540-6806 | Email: [echilds@hernandoclerk.org](mailto:echilds@hernandoclerk.org)

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**From:** Carla Rossiter-Smith <CRossiter-Smith@co.hernando.fl.us>  
**Sent:** Wednesday, December 13, 2023 2:49 PM  
**To:** Pam Hare <pHare@co.hernando.fl.us>; Emily Childs <echilds@hernandoclerk.org>; Lindsey Brown <lindseyb@co.hernando.fl.us>; Fran Hallet <FHallet@co.hernando.fl.us>  
**Subject:** RE: Accounts Payable Question for County Attorney's Office

**CAUTION:** This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Pam,

Ideally Westlaw would invoice at the 7% for the months off of contract and I would suggest we propose that rather than a credit. We could then pay outstanding invoices with a check under a Purchasing Policy Exception because there is not a PO for those invoices. Given that there were negotiations on price taking place and that Westlaw is an exempt procurement and one we would not be without, I would be fine issuing a PO for the services rendered during the non-contract months while the new contract increase was being negotiated as well.

Emily, is Finance amenable to the two scenarios I've proposed above? If not, please advise on an alternative payment method.

Lastly, if Westlaw is insistent upon the 12% and later applying a credit then I will defer to Finance on how to proceed with application of the credit. I assume that would be applied as a discount on the first invoice or two under the new contract and that a notation of the credit in the new contract would suffice for ensuring that the credit was granted to the County.

Thanks,

Carla Rossiter-Smith, MSM PMP  
Chief Procurement Officer  
[Crossiter-smith@co.hernando.fl.us](mailto:Crossiter-smith@co.hernando.fl.us)  
Office: (352) 540-6544  
Cell: (352) 667-4272

**From:** Pamela Hare <[PHare@co.hernando.fl.us](mailto:PHare@co.hernando.fl.us)>  
**Sent:** Wednesday, December 13, 2023 12:41 PM  
**To:** Carla Rossiter-Smith <[CRossiter-Smith@co.hernando.fl.us](mailto:CRossiter-Smith@co.hernando.fl.us)>; Emily Childs <[echilds@hernandoclerk.org](mailto:echilds@hernandoclerk.org)>; Lindsey Brown <[lindseyb@co.hernando.fl.us](mailto:lindseyb@co.hernando.fl.us)>; Fran Hallet <[FHallet@co.hernando.fl.us](mailto:FHallet@co.hernando.fl.us)>  
**Subject:** Re: Accounts Payable Question for County Attorney's Office

We're just trying to get a solution worked out ahead of time before agreeing to their suggestion. As far as CAO is concerned, our agreement should have renewed October 1 at 7% as we were not notified of an adjustment in advance before the 12% increase showed up in the October and November invoices. They claim notification was made but will honor the 7% so long as we enter into a new agreement starting the date of execution. So we will have a contract that ended October 1 and a renewal effective December something which leaves us with two months at the higher 12% rate (with the difference to be credited in the future) and no contract. I don't know how to deal with those two months to make it acceptable to Finance and Procurement. Maybe the solution will be something else altogether which I would happily propose to Westlaw.

I'm working remotely today, so call me if any further explanation is needed at 352/667-3004.

Thanks everyone!

Pam.

---

**From:** Carla Rossiter-Smith <[CRossiter-Smith@co.hernando.fl.us](mailto:CRossiter-Smith@co.hernando.fl.us)>  
**Sent:** Wednesday, December 13, 2023 11:50  
**To:** Emily Childs <[echilds@hernandoclerk.org](mailto:echilds@hernandoclerk.org)>; Lindsey Brown <[lindseyb@co.hernando.fl.us](mailto:lindseyb@co.hernando.fl.us)>; Fran Hallet <[FHallet@co.hernando.fl.us](mailto:FHallet@co.hernando.fl.us)>  
**Cc:** Pamela Hare <[PHare@co.hernando.fl.us](mailto:PHare@co.hernando.fl.us)>  
**Subject:** RE: Accounts Payable Question for County Attorney's Office

I thought the question was how to make payment for the two months not covered under either contract. Pam, will you please clarify. Is it that we are receiving a credit or that we need to make payment for 2 months not covered under either contract?

Thanks,

Carla Rossiter-Smith, MSM PMP  
Chief Procurement Officer  
[Crossiter-smith@co.hernando.fl.us](mailto:Crossiter-smith@co.hernando.fl.us)  
Office: (352) 540-6544  
Cell: (352) 667-4272

From: Emily Childs <[echilds@hernandoclerk.org](mailto:echilds@hernandoclerk.org)>

Sent: Wednesday, December 13, 2023 11:33 AM

To: Carla Rossiter-Smith <[CRossiter-Smith@co.hernando.fl.us](mailto:CRossiter-Smith@co.hernando.fl.us)>; Lindsey Brown <[lindseyb@co.hernando.fl.us](mailto:lindseyb@co.hernando.fl.us)>; Fran Hallett <[FHallett@co.hernando.fl.us](mailto:FHallett@co.hernando.fl.us)>

Subject: RE: Accounts Payable Question for County Attorney's Office

Are you advising for her to submit an RQ for the two months at the higher rate?  
It appears the company is wanting to apply a 'credit' for the two months billed.

Emily Childs

~~Board Accounting | Accounts Payable Manager~~

**NOTICE**  
Office of Doug Chorvat Jr., Clerk of Circuit Court and Comptroller

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From: Carla Rossiter-Smith <[CRossiter-Smith@co.hernando.fl.us](mailto:CRossiter-Smith@co.hernando.fl.us)>

Sent: Wednesday, December 13, 2023 11:12 AM

To: Emily Childs <[echilds@hernandoclerk.org](mailto:echilds@hernandoclerk.org)>; Lindsey Brown <[lindseyb@co.hernando.fl.us](mailto:lindseyb@co.hernando.fl.us)>; Fran Hallett <[FHallett@co.hernando.fl.us](mailto:FHallett@co.hernando.fl.us)>

Subject: RE: Accounts Payable Question for County Attorney's Office

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Hello,

I would agree a PO for the two months only, that should do it. It's an exempt purchase so it should be pretty easy.

Thanks,

Carla Rossiter-Smith, MSM PMP

Chief Procurement Officer

[Crossiter-smith@co.hernando.fl.us](mailto:Crossiter-smith@co.hernando.fl.us)

Office: (352) 540-6544

Cell: (352) 667-4272

From: Emily Childs <[echilds@hernandoclerk.org](mailto:echilds@hernandoclerk.org)>

Sent: Tuesday, December 12, 2023 4:08 PM

To: Lindsey Brown <[lindseyb@co.hernando.fl.us](mailto:lindseyb@co.hernando.fl.us)>; Fran Hallett <[FHallett@co.hernando.fl.us](mailto:FHallett@co.hernando.fl.us)>

Cc: Carla Rossiter-Smith <[CRossiter-Smith@co.hernando.fl.us](mailto:CRossiter-Smith@co.hernando.fl.us)>

Subject: FW: Accounts Payable Question for County Attorney's Office

Good afternoon,

Are you ladies able to help me work through this issue with Pam?  
It appears the contract has since expired, and they are asking us to renew at a different rate.  
Although, as you will read below, Pam has worked it where we will not be receiving the increase any longer.



I have many questions, but figured this might be best starting with you guys.

I would assume a new PO is required for this purchase.  
Please take a look and let me know your thoughts.  
Thank you.

Emily Childs

~~Board Accounting | Accounts Payable Manager~~

~~Office of Doug Chorvat Jr., Clerk of Circuit Court and Comptroller~~

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From: Pamela Hare <PHare@co.hernando.fl.us>  
Sent: Tuesday, December 12, 2023 2:38 PM  
To: Emily Childs <echilds@hernandoclerk.org>  
Subject: RE: Accounts Payable Question for County Attorney's Office

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The existing PO is 22000291. The agreement they are proposing and the invoices for October and November are attached

Pam Hare  
Co. Attorney's Office  
x20138

From: Emily Childs <echilds@hernandoclerk.org>  
Sent: Tuesday, December 12, 2023 2:34 PM  
To: Pamela Hare <PHare@co.hernando.fl.us>  
Subject: Re: Accounts Payable Question for County Attorney's Office

Pam,

Is there a PO number attached to this so I can look at the documents you are referencing?

From: Pamela Hare <PHare@co.hernando.fl.us>  
Sent: Tuesday, December 12, 2023 2:30:22 PM  
To: Emily Childs <echilds@hernandoclerk.org>  
Subject: Accounts Payable Question for County Attorney's Office

**CAUTION:** This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Emily,

I'm not certain that you are the appropriate person to address this to, so please forward if necessary to whomever you see fit.

We have an agreement with Westlaw for online legal research. Our most recent agreement was subject to a 7% renewal increase on October 1; however, when the invoice came, it reflected a 12% increase. They agreed "as a courtesy" to keep the adjustment at 7%, however, want us to enter into a new contract. Since two months have now passed, I asked that the effective date be made October 1, 2023 and that they provide us with adjusted invoices for October and November. They are refusing to do so. Instead, they want a new contract starting now with the 7% increase, with a credit to be issued for the two months at the 12% adjustment. My question is if we can use the existing agreement at the 7% for the two overdue invoices at the 12%. If not, how would you suggest that we resolve this? It's only a few dollars difference each month so we're not talking big money here, but at the same time, we want to get it done right.

Hopefully, I explained this in such a way to make it understandable. Please call me at the extension below if you have any questions. Thank you!

Pam Hare  
Co. Attorney's Office  
x20138

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