

Participation Report Guidelines

After an LEA is certified by the Department of Public Instruction as being E-Procurement compliant in accordance with G.S. 143-53(a)(2), the LEA is required to use E-Procurement for purchases totaling at least 30% of its remaining unencumbered funds used to purchase goods for that fiscal year. In the next fiscal year, the LEA is required to use E-Procurement for 35% of these purchases, with a goal of 50%. In the third fiscal year, the LEA requirement is 40% with a goal of 70%.

Compliance with the percentages outlined in SB620 is calculated for each LEA using both their submitted unencumbered funds and participation reports. The unencumbered funds report provides the total expenses for the time period specified. The participation report includes summary information for paid invoices from Type A, Type B, and Type C purchases. Spend percentages are calculated as follows: the total of all E-Procurement order amounts noted on the participation report (Type B and Type C orders) divided by the total expenses as noted on the unencumbered funds report

In order to review progress towards this goal, the participation report available within each LEA's purchasing system should be submitted on a quarterly basis. The report should be emailed to eprocurement@ncmail.net by the 5th business day of each fiscal quarter, beginning with the quarter in which they are certified compliant. The report submitted in the last quarter of the fiscal year should be run for the entire previous year.

Each LEA may also submit a copy of their unencumbered funds report (to note expended funds) with their participation report each quarter to obtain an accurate assessment of their participation progress. If the unencumbered funds report is not submitted on a quarterly basis, the LEA's unencumbered funds statement will be used to calculate participation progress. At the end of each fiscal year, the participation report will be used in conjunction with the unencumbered funds report to calculate participation percentages for the entire fiscal year.

Please contact NC E-Procurement Help Desk at (888) 211-7440 or ephelpdesk@ncmail.net if you have questions.