



IT Supplemental Staffing Purchase Order Guidelines

Please follow the processes below to issue a purchase order to procure an ITSS Program resource/contractor for all task orders issued through the VMS, PeopleFluent.

- Issuing the purchase order as soon as possible after the resource/contractor is selected is essential for resource/contractor availability. The resource/contractor may not report to work for the assignment until the purchase order has been issued.
- The State recommends the purchase order be issued to Computer Aid Inc. (CAI) within 5 business days of hiring manager notifying the purchasing department of the resource/contractor selection or of the need for a 'Change' order.

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VMS Hiring Manager Guidelines:

General Notification Instructions

- The agency hiring manager should notify the purchasing department via email that an IT Supplemental Staffing resource has been selected for hire on the **same** business day the resource is selected.
- The agency hiring manager should also notify the purchasing department via email on the **same** business day if a change is needed to an existing ITSS Program purchase order.
- To begin agency specific on-boarding requirements, the agency hiring manager should notify the human resources department and/or appropriate agency personnel via email that an IT Supplemental Staffing resource has been selected for hire on the **same** business day the resource is selected. Hiring managers may send a separate email to the HR department/appropriate personnel or copy the HR department/appropriate personnel on the email sent notifying the purchasing department of the award.



A. New Task Order and Purchase Order Steps: The hiring manager should provide the following information in the email to the appropriate purchasing department personnel. This email is not automatically generated in the VMS; it is an external email.

1. Project Name to which the resource will be assigned
2. Skill Level and Job Title
3. Number of Estimated Hours the resource will work (Quantity)
4. Bill Rate the Agency will pay per hour for the resource (Price)
5. If Expenses are allowed, indicate the estimated Cost of Expenses
6. Suggested NCAS accounting combination (if available/ pre-approved)
7. IT Provider (if available)
8. PeopleFluent Task Order/ Requisition Number and Selected Resource Full Name
9. Any attachments or documentation that needs to be attached to the Purchase Order
10. If email is for a 'Change' request on an existing Purchase Order, include the reason why the change is needed (examples: Backfill, Extension, Final Price)

Note: CAI's Contract Manager or Help Desk can assist hiring managers by generating a report with most of the information above if needed [\[Back to Top\]](#)

B. Backfill and 'Change' Order Steps: The hiring manager should notify the Purchasing Department via email as soon as a task order backfill takes place providing the same information above so that Purchasing Department can issue a 'Change' order. Make special note of the Bill Rate and the IT Provider (if available) as it is possible for both to change due to backfills being put out to the supplier community for competition. For #10 (above), also include the total number of hours the backfilled (first) resource actually completed so the purchasing department can invoice for that per hour Bill Rate. The position will not be backfilled until CAI receives the 'Change' order. [\[Back to Top\]](#)

C. Extension and 'Change' Order Steps: The hiring manager should notify the Purchasing Department via email as soon as an extension request is granted providing the same information above so that Purchasing Department can issue a 'Change' order to request the additional funds. A resource will not be extended until CAI receives the 'Change' order. [\[Back to Top\]](#)

D. Final Price and 'Change' Order Steps: The hiring manager should notify the Purchasing Department via email as soon as a final price per hour is agreed upon by both the agency and the provider. As the purchasing department may have already issued the purchase order with the initial price estimate, providing the same information above, with the new final price, is essential so that Purchasing Department can issue a 'Change' order to reduce the cost per hour and Computer Aid, Inc. will know the final price was reached. [\[Back to Top\]](#)

Purchasing Department Guidelines:

A. New Task Order: Steps for Entering a New eRequisition in NC E-Procurement [\[Back to Top\]](#)

- Steps below are for issuing a purchase order for temporary IT staff procured through the VMS, PeopleFluent. If the task order was issued through the previous OITS website method, please continue to change/close purchase orders according to your agency's current policy.
- The agency hiring manager will email the purchasing department the specific information needed to enter a new eRequisition for procuring temporary IT staff. Please complete and 'Submit' the eRequisition within 8 business hours of receiving the hiring managers email notification.



1. From the NC E-Procurement Dashboard, click '**eRequisition**' from the '**Create**' Shortcut Menu on either the Menu Bar or the '**Common Actions**' Portlet. Click on '**Summary**' in the top right corner.
2. On the '**Summary**' page, enter the **Title** in the following format:
 - Agency Abbreviation: Project: PeopleFluent Skill Level and Job Title: Date the Resource was selected for Hire
 - Example: DHHS: NC FAST: Junior Database Administrator: 7/23/2015
3. Ensure the '**Transmit to Supplier?**' box is Checked
3. Click the '**Add Non-Catalog Item**' button to enter non-catalog information.
4. **Full Description:** Re-enter the **Title** from the **Summary** Page in same format
5. **Commodity Code:** Enter only a **900** level commodity code for a **Service**. Suggested Code: **918 - CONSULTING SERVICES** and drill down for more specific consulting services the resource will provide.
Note: It is important to select the appropriate commodity code as the State of North Carolina uses the commodity codes for reporting purposes and to apply the NC E-Procurement fee which is only applicable to goods.
6. **Supplier:** Supplier will always be **Computer Aid, Inc. (CAI)**
7. **Location:** One location is listed to select: **CAI-Raleigh; IT Services**
8. **Bid Number (State Agencies Only):** Leave Blank
9. **Supplier Part Number:** Leave Blank
10. **Recycled Content:** Leave Set to Default Value (**No**)
11. **Item Classification:** **Service**; This Will Default Automatically.
12. **Contract Type:** Select **IT Convenience**.
13. **Contract:** Select **ITS-002441-OE3: Short Term Staffing Contract**
14. **Blanket Purchase:** **Yes**
15. **Quantity:** Enter total number of hours for hire.
16. **Unit of Measure:** **Hour**
17. **Price:** Enter the per hour **Bill Rate** the hiring manager provided
18. **Tax Rate:** **Other**
19. **Tax Amount:** \$0.00 USD
20. **Amount:** This field is automatically calculated based on the information entered above.



21. **Accounting – by Line Item:** The hiring manager may have provided a suggested accounting combination. **NCAS Agencies** must fill in the **'Company,' 'Account,'** and **'Center'** fields. Based on the combination entered, the **'Federal Award Number'** and **'ARRA'** fields may be also be populated. **School Systems and Community Colleges** must enter the **'Account Code.'**

22. Complete all other required information and Click **'OK'**

23. If Expenses were allowed, enter a 2nd Non-Catalog Item. The **Full Description** is 'Expenses' or 'Other Specific Expense' information the hiring manager provided (ex: Mileage). **Commodity Code:** select 900 level service code; **Blanket Purchase:** No; **Quantity:** Total Amount/Cost of Expenses allowed; **Unit of Measure:** Dollar; **Price:** \$1.00 USD; Enter all other required information; Click **'OK'**

Notes on Expense Line Items:

- If multiple expenses are allowed of differing types, enter a new line item for each different type of expense.
- If the expense is a 'good' and not a 'service,' use the appropriate **Commodity Code** and **Unit of Measure** to identify the 'good' being expended for the task order.

24. The **'Shipping – Entire eRequisition'** section on the **'Summary'** page should be populated. There is no need to change this section. **'Terms of Payment'** should stay **'N30.'**

25. In **'Comments - Entire eRequisition'** section on the **'Summary'** page, enter the IT Provider who is actually supplying the resource if hiring manager included the IT Provider in the email. If agencies would like to include the PeopleFluent requisition/task order number and/or resource name, please make note in the **'Comments'** section for tracking purposes. Be sure the **'Visible to Supplier'** checkbox is checked so that Computer Aid Inc. (CAI) can see the comments.

26. In **'Attachments - Entire eRequisition'** section on the **'Summary'** page, add any attachments the hiring manager sent over in the email. Be sure the **'Visible to Supplier'** checkbox is checked so that Computer Aid Inc. (CAI) can see the attachment(s).

27. Update all other required and optional fields as necessary, and click the **'Submit'** button either at the top of the bottom of the page.

28. The system generated approval flow can be reviewed by clicking the **'Approval Flow'** tab.

29. Check back to ensure the requisition is fully approved and the status changes to **'Ordered.'**

B. Backfill 'Change' Order: Steps for Issuing a 'Change' order in NC E-Procurement [\[Back to Top\]](#)

- Steps below are for changing a purchase order for a temporary IT staff if the task order was issued through the VMS, PeopleFluent. If the task order was issued through the previous OITS website method, please continue to change/close purchase orders according to your agency's current policy.
- Example Backfill Situation: A requisition/task order was awarded originally in VMS on August 15, 2015 and was approved for 12 months (ending August 15, 2016). In January 2016, with 6 months remaining on the VMS issued requisition/task order, the resource leaves and agency needs to 'backfill' that position for the remaining 6 months.
- The agency hiring manager will email the purchasing department specific information needed to issue a 'Backfill Change Order' once the VMS backfilling process is complete.



1. The Purchase Order must be in **'Ordered'** or **'Receiving'** status in order for the 'Change' order to process successfully.

Also, before completing a 'Change' order, check NCAS for the invoicing status of each line item.

- If an ITSS Program line item has been invoiced in NCAS, unreceiving the line item in NC E-Procurement below the NCAS invoiced amount will cause a 'Receipt Failure' and changing the line item in NC E-Procurement below the NCAS invoiced line item amount will cause a 'Purchase Order Failure.'
- Therefore, it is important to 'Receive' in NC E-Procurement and invoice in NCAS only the amount that the backfilled (first) resource should be paid. When creating the 'Change' order to remove the remaining funds the backfilled resource will not use from line item 1, the changed line item amount must be equal to or greater than the NCAS invoiced amount and NC E-Procurement received amount.

2. Access the requisition directly, and click **'Change.'**

3. Check the box next to line item 1 and then click **'Edit'**

4. Change the **'Quantity'** of line item 1 to the total number of hours the backfilled (first) resource completed and for which the Provider will be paid. *Check NCAS for invoicing status before completing the line item change.

4. **Copy** the first line to add a second line item (third line and so on if expenses were allowed) to the purchase order.

5. Update **Full description**: enter **'Backfill'** in front of the copied line item description and update the hiring date

- Backfill: Agency Abbreviation: Project: PeopleFluent Skill Level and Job Title: Date the NEW Resource was selected for Hire
- Example: Backfill: DHHS: NC FAST: Junior Database Administrator: 8/5/2015

6. Update **Quantity**: Enter total number of hours for hire remaining on the task order/ purchase order. The remaining amount should be the remaining funds OSBM/ITS pre-approved on the original hiring addendum form.

7. Update **Price**: Enter the **New Bill Rate** the hiring manager provided. The total amount of the purchase order should not be higher than the amount OSBM/ITS pre-approved on the original hiring addendum form.

8. All other information should be pre-populated based on the 'Copy' function. Complete any remaining required or optional fields and Click **'OK'**

9. In **'Comments - Entire eRequisition'** on the 'Summary' page, add a new comment noting the new IT Provider actually supplying the resource if hiring manager included the IT Provider in the email. If agencies would like to include the PeopleFluent requisition/task order number and/or new resource name, please make note in the **'Comments'** section. Be sure the **'Visible to Supplier'** checkbox is checked so that Computer Aid Inc. (CAI) can see the comments.

10. Edit any **Expense** line items, if needed, by changing the **Quantity**: Total Amount/Cost of Expense allowed.

11. **'Submit'** the Change Order



12. Check back to ensure the 'Change' order is fully approved (bypassing or completing agency approvals) and the status changed to 'V2.'

C. Extension 'Change' Order: Steps for Issuing a 'Change' order in NC E-Procurement [\[Back to Top\]](#)

- Steps below are for changing a purchase order for a temporary IT staff if the task order was issued through the VMS, PeopleFluent. If the task order was issued through the previous OITS website method, please continue to change/close purchase orders according to your agency's current policy.
- Example Extension Situation: A requisition/task order was awarded originally in VMS on August 15, 2015 and was approved for 12 months (ending August 15, 2016). In July 2016, the requisition/task order is about to expire but the agency needs the position and purchase order to be extended for an additional 4 months to complete project work.
- The agency hiring manager will email the purchasing department specific information needed to issue an 'Extension Change Order.'

1. The Purchase Order must in '**Ordered**' or '**Receiving**' status in order for the 'Change' order to process successfully.

Also, before completing a 'Change' order, check NCAS for the invoicing status of each line item.

- As the purchasing team will not need to change the first line item regarding the initially encumbered NCAS funds for the original task order timeframe, the purchasing team should simply be sure the original line item (Purchase Order) is still open to invoicing in NCAS. If the line item is still open, proceed with 'Change' order steps below.
- If the purchase order is 'Closed' to invoicing in NCAS, the 'Change' order will 'Fail' in NC E-Procurement. In this special circumstance, a new purchase order will have to be created in NC E-Procurement for the extension. Please note the original purchase order number in the '**Comments - Entire eRequisition**' section of the new purchase order for tracking purposes.

2. Access the requisition directly, and click '**Change**.'

3. Check the box next to line item 1 and then click '**Copy**'

4. **Copy** the first line to add a second line item (third line and so on if expenses were allowed) to the purchase order.

5. Update **Full description**: enter '**Extension**' in front of the copied line item description and the extension date

- Extension: Agency Abbreviation: Project: PeopleFluent Skill Level and Job Title: Date the Resource was Extended
- Example: Extension: DHHS: NC FAST: Junior Database Administrator: 5/15/2016

6. Update **Quantity**: Enter total number of extension hours approved according to the hiring manager's email.

7. **Price**: The **Bill Rate** should remain the same as the same supplier will be asked to fill the extension with the same resource at the same rate. However, please verify this information from the hiring manager's extension request email.

8. All other information should be pre-populated based on the 'Copy' function. Complete any remaining required or optional fields and Click '**OK**'



9. In **'Comments - Entire eRequisition'** and **'Attachments - Entire eRequisition'** sections on the 'Summary' page, purchasing teams may add comments or attachments to note when the Extension request was granted/received for internal tracking purposes.

10. Edit any **Expense** line items, if needed, by changing the **Quantity**: Total Amount/Cost of Expense allowed.

11. **'Submit'** the Change Order.

12. Check back to ensure the 'Change' order is fully approved (bypassing or completing agency approvals) and the status changed to 'V2.'

D. Final Price 'Change' Order: Steps for Issuing a 'Change' order in NC E-Procurement [\[Back to Top\]](#)

- Steps below are for changing a purchase order for a temporary IT staff if the task order was issued through the VMS, PeopleFluent. If the task order was issued through the previous OITS website method, please continue to change/close purchase orders according to your agency's current policy.
- Example Final Price Situation: Purchasing departments may issue the initial eRequisition with the initial price estimate as instructed by the hiring manager in the original purchase order email request. However, the hiring manager may then notify the purchasing department via email that a new final price per hour was reached by the agency and provider. Therefore, the price per hour for the resource will need to be changed.
- The agency hiring manager will email the purchasing department specific information needed to issue a 'Final Price Change Order.'

1. The Purchase Order must in **'Ordered'** or **'Receiving'** status in order for the 'Change' order to process successfully. As the final price should be reached before the resource starts work, the purchase order should be in 'Ordered' status.

Also, before completing a 'Change' order, check NCAS for the invoicing status of each line item. As the final price should be reached before the resource starts work, the line item should be completely open to invoicing therefore allowing a line item change to the price.

2. Access the requisition directly, and click **'Change.'**

3. Check the box next to line item 1 and then click **'Edit'**

4. Update **Full description**: enter **'Final Price'** in front of the line item description

- Final Price: Agency Abbreviation: Project: PeopleFluent Skill Level and Job Title: Date the Resource was selected for Hire
- Example: Final Price: DHHS: NC FAST: Junior Database Administrator: 7/23/2015

5. Change the **'Price'** of line item 1 to new final price per hour (the **'Quantity'** should remain the same)

6. In **'Comments - Entire eRequisition'** and **'Attachments - Entire eRequisition'** sections on the 'Summary' page, purchasing teams may add comments or attachments to note when the Final Price request was granted/received for internal tracking purposes.

6. **'Submit'** the Change Order.



7. Check back to ensure the 'Change' order is fully approved (bypassing or completing agency approvals) and the status changed to 'V2.'

E. Entering a New Non- NC E-Procurement Purchase Order [\[Back to Top\]](#)

1. Please follow your agency guidelines for entering a Non- NC E-Procurement Purchase Order. Please include as much information possible noted above in the "New Task Order: Steps for Entering a New eRequisition in NC E-Procurement" section.

2. Enter the **Title** in the following format:

- Agency Abbreviation: Project: PeopleFluent Skill Level and Job Title: Date the Resource was selected for Hire
- Example: DOT: Project Code 0901B: Junior Database Administrator: 7/23/2015

3. Purchase Order should be issued to **Computer Aid, Inc. (CAI)**

4. Please consult your purchasing department leadership if you have any questions about what information to enter for the purchase order.

F. Changing a Non- NC E-Procurement Purchase Order [\[Back to Top\]](#)

- Backfilled Task Orders: A 'Change' order will need to be created when a backfill request is granted. As all purchase orders are now issued to **Computer Aid, Inc. (CAI)**, no change to the supplier is needed. Backfill purchase order changes may require changes to the **Price** (Bill Rate) and the possibly the **Quantity**.
- Extended Task Orders: A 'Change' order will need to be created when an extension request is granted. As all purchase orders are now issued to **Computer Aid, Inc. (CAI)**, no change to the supplier is needed. Extension purchase order changes will require changes to the **Quantity**.
- Final Price Task Orders: A 'Change' order may need to be created when a final price is reached if the original purchase order has already been issued with the initial price estimate. As all purchase orders are now issued to **Computer Aid, Inc. (CAI)**, no change to the supplier is needed. Final Price purchase order changes will require changes to the **Price** (Bill Rate).

1. Please follow your agency guidelines for issuing a Non- NC E-Procurement 'Change' Purchase Order. Please include as much information possible noted above in the "Backfill 'Change' Order: Steps for Issuing a 'Change' order in NC E-Procurement," "Extension 'Change' Order: Steps for Issuing a 'Change' order in NC E-Procurement," and "Final Price 'Change' Order: Steps for Issuing a 'Change' order in NC E-Procurement" sections.

2. Please consult your purchasing department leadership if you have any questions about what information to enter for the purchase order change.



G. NC E-Procurement Purchase Order Reminders [\[Back to Top\]](#)

- Receipts submitted against a line item with the Unit of Measure 'Hour' will transmit to NCAS. Receipts submitted against a line item with a Unit of Measure of 'Dollar' will not transmit to NCAS.
- Receiving against line items should be completed according to the agency's receiving policies. It is recommended that the invoiced amount per line item in NCAS match the received amount in per line item in NC E-Procurement.
- Before a NC E-Procurement line item can be changed, the line should first be unreceived to avoid 'Change' order failures. If the quantity previously received is greater than the quantity on the 'Change' order, the 'Change' order will fail.
- Before a NC E-Procurement line item can be changed, the purchasing team should check the invoicing status of the line item in NCAS. If a 'Change' order is created, the line item (purchase order) must be open to invoicing in NCAS, and the 'changed' line item amount cannot be below the NCAS invoiced amount.
- Please do not 'Cancel' an ITSS Program NC E-Procurement purchase order or 'Delete' a line item from an ITSS Program NC E-Procurement purchase order if it can be avoided. Please do not start a new Purchase Order in NC E-Procurement for the same task order whether the needed change is due to the task order being backfilled, extended, or initial price estimate change if it can be avoided. As the supplier will no longer change and will always be Computer Aid, Inc. (CAI), please instead follow the 'Change' option instructions in this document to update the purchase order as needed.
- If you have further questions, please email or call the NC E-Procurement Helpdesk at ephelpdesk@its.nc.gov or 888-211-7440, option 1, M-F 7:30am to 5:00pm EST.