DHHS OpenBook Process Guide

This job aid provides detailed information related to the three primary NC OpenBook fields within the North Carolina E-Procurement system: Federal Award Number, Grant ID, and Bid Number. The functionality outlined below is specific to the Department of Health and Human Services (DHHS). NC OpenBook information allows for better tracking of State spending relating to federal awards, grants and bids.

Note: Users can search for eRequisitions based on NC OpenBook fields. Please reference the System Searches process guide for specific information.

I. Federal Award Number

Accounting Combinations created in the North Carolina Accounting System (NCAS) determine the use of Federal Award Numbers on NC E-Procurement transactions. Based on the Accounting information entered on a requisition, a Federal Award Number may be required to complete the transaction.

1. When an Accounting Combination (Company, Account, Center) associated with American Recovery and Reinvestment Act (ARRA) funds is selected, NC E-Procurement will default the appropriate Federal Award Number, Catalog of Federal Domestic Assistance (CFDA) number and award title based on data provided by the Office of State Budget and Management (OSBM).

Note: A Federal Award Number is required when using an Accounting Combination associated with ARRA Funds.
2. If an ARRA designated Accounting Combination is selected and NC E-Procurement cannot default the appropriate Federal Award Number, the user will be required to select a value from the drop-down menu.

When an ARRA Accounting Combination is selected, the ‘Federal Award Number’ field is required.
3. Click the down arrow next to the ‘Federal Award Number’ field. If the appropriate Federal Award Number is not displayed as a recent selection, select ‘Search for more...’ to view the full list of available Federal Award Numbers.

4. The ‘Choose Value for Federal Award Number’ pop-up window allows users to search for and select the appropriate Federal Award Number for the line item. The user can search by CFDA, Federal Award Number, Award Title, Award Type or NC_ARRA indicator.

5. Due to the unique management of funds within DHHS, the appropriate Federal Award Number may be ARRA or Non-ARRA. To search by NC_ARRA indicator, select ‘NC_ARRA’ from the search field drop-down menu. Type the word ‘yes’ to search for Federal Award Numbers tied to ARRA funds.
6. To add a Federal Award Number to the line item, click the 'Select' button next to the appropriate value.

**Note:** NC E-Procurement receives Federal Award Numbers from OSBM nightly, Monday - Friday. A Non-ARRA Federal Award Number or an ARRA Federal Award Number established by 5PM will be available the next business day.

**Note:** The 'Choose Value for Federal Award Number' pop-up window will display a maximum of 500 Federal Award Numbers. If there are over 500 Federal Award Numbers available for selection, utilize the search functionality to narrow your results.

7. When a Non-ARRA Accounting Combination is selected, the Federal Award Number field is displayed as a drop-down menu, but is not a required field.
8. Select the down arrow next to the ‘Federal Award Number’ field. If the appropriate Federal Award Number is not displayed as a recent selection, choose ‘Search for more…’ to view the full list of available Federal Award Numbers.

**Note:** When selecting an Accounting Combination that represents Non-ARRA federal funding, it is important to use the drop-down menu to select the appropriate Federal Award Number. This action allows for accurate reporting of state spending related to federal awards.

9. The ‘Choose Value for Federal Award Number’ pop-up window allows users to search for and select the appropriate Federal Award Number for the line item. The user can search by CFDA, Federal Award Number, Award Title, Award Type or NC_ARRA indicator.

**Note:** The ‘Choose Value for Federal Award Number’ page will display a maximum of 500 Federal Award Numbers. If there are over 500 Federal Award Numbers available for selection, utilize the search functionality to narrow your results.
10. To add a Federal Award Number to the line item, click the ‘Select’ button next to the appropriate value.
II. Grants

NCAS Accounting Combinations determine the use of Grant Numbers on NC E-Procurement transactions. Based on the Accounting information entered on a requisition, users may be required to select a Grant ID related to their purchase. There are two types of grants in NC E-Procurement, Non-Government Grants and Government Grants. Non-Government grants are grants from the State to non-government entities. Government Grants are grants from one State entity to another. The type of grant is determined by the Account used on the eRequisition’s line items.

1. When a user selects a Non-Government designated Account, the ‘Grant ID’ field is displayed as a drop-down menu.

**Note:** A Grant ID is required when using a Non-Government designated Account.

When a Non-Government designated Account is selected, the ‘Grant ID’ field is required.
2. Click the down arrow on the ‘Grant ID’ drop-down menu. If the appropriate Grant ID is not displayed as a recent selection, select ‘Search for more…’ to view the full list of available Grant IDs.

Select ‘Search for more…’ to view the full list of available Grant IDs.
3. The ‘Choose Value for Grant ID’ pop-up window allows users to search for and select the appropriate Grant ID for the line item. The user can search by Grant ID, Program Name, or Grantee.

4. To add a Grant ID to the line item, click the ‘Select’ button next to the appropriate value.
**Note:** When a user selects a Government designated Account, the ‘**Government Grant ID**’ field is displayed as a free text field. The ‘**Government Grant ID**’ is an optional free text field that holds up to 15 characters.

When a Government designated Account is selected, the ‘**Government Grant ID**’ free-text field is displayed, but not required.
III. Bid Number and Contract Type

Items purchased from a catalog in NC E-Procurement are associated with a specific State Term Contract ID and Bid Number. When a catalog line item is added to a requisition, the ‘Contract ID’ and ‘Bid Number’ fields are automatically pre-populated with the appropriate values. Items purchased using Non-Catalog functionality have drop-down menus for both the Contract ID and Bid Number, allowing users to select the appropriate values for their transaction.

**Note:** Contract Type, Contract ID, and Bid Number must all ‘match.’ Users who encounter an error message after selecting a value from any of the drop-down menus may need to select ‘Search for more...’ to find the appropriate value. This ensures that the Contract Type, Contract ID, and Bid Number combination on the eRequisition are part of a compatible set.

1. Select the appropriate Contract Type using the ‘Contract Type’ drop-down menu.
2. When the user selects ‘Statewide’ as the Contract Type, the ‘Contract’ field is displayed as a drop-down menu.

3. Select the down arrow from the ‘Contract’ drop-down menu. Choose ‘Search for more...’ to view the full list of available contracts.
4. If ‘Search for more...’ is selected, the ‘Choose Value for Contract’ pop-up window will appear. This pop-up window allows users to search by contract name and select the appropriate contract.

5. To add a Contract to the line item, click ‘Select’ next to the appropriate value.
6. When a Contract is selected, the *Bid Number* field automatically populates with the Bid Number associated with that Contract.

**Note:** If the existing Bid Number is inactivated while the order is in progress or when a change order is created, the user can reselect the correct/newly active Bid Number from the Bid Number dropdown box.
7. When the user selects ‘Agency Specific’ as the Contract Type, a required ‘Contract’ free-text field appears.

8. The ‘Bid Number’ field appears as a drop-down menu, and is not a required field. Choose ‘Search for more…’ from the drop-down menu to view the full list of available Bid Numbers.

Users can select the appropriate Bid Number using the ‘Bid Number’ drop-down menu.
9. If ‘Search for more...’ is selected, the ‘Choose Value for Bid Numbers’ pop-up window will appear. This pop-up window allows users to search by bid number or description and to select the appropriate bid number.

10. To add a Bid Number to the line item, click ‘Select’ next to the appropriate value.
11. When the user selects ‘IT Convenience’ as the Contract Type, the ‘Contract’ field is displayed as a drop-down menu.

12. Click the down arrow on the ‘Contract’ drop-down menu. Choose ‘Search for more…’ to view the full list of available contracts.
13. If ‘Search for more...’ is selected, the ‘Choose Value for Contract’ pop-up window will appear. This pop-up window allows users to search by contract name and select the appropriate bid number.

14. To add a Contract to the line item, click ‘Select’ next to the appropriate value.
15. The ‘Bid Number’ field appears as a drop-down menu, and is not a required field. Choose ‘Search for more…’ from the drop-down menu to view the full list of available Bid Numbers.
16. If ‘Search for more...’ is selected, the ‘Choose Value for Bid Numbers’ pop-up window will appear. This pop-up window allows users to search by bid number or description and to select the appropriate bid number.

17. To add a Bid Number to the line item, click ‘Select’ next to the appropriate value.