Procurement Matter of Record eForm

Introduction

In cases of emergency or pressing-need procurements which may only be rectified by immediate, on the spot purchase or rental of commodities, printer, or services and with prior verbal approval from P&C (if possible), explanation of the purchase shall be reported to P&C. This will be done via the **Procurement Matter of Record eForm**. This is only applicable if the expenditure is over the agency's general delegation. This eForm is only available in Expert View of the State Agencies NCFS realm of NC eProcurement (NCEP). To access this eForm as a non-NCFS NC eProcurement purchaser, users must be added to the **Procurement Request eForms (CC and Universities)** group in their NC eProcurement profile. Updates can be made through a User Maintenance eForm. For more information on this process, please see the **System Administrator** job aid.

Learning **Objectives**

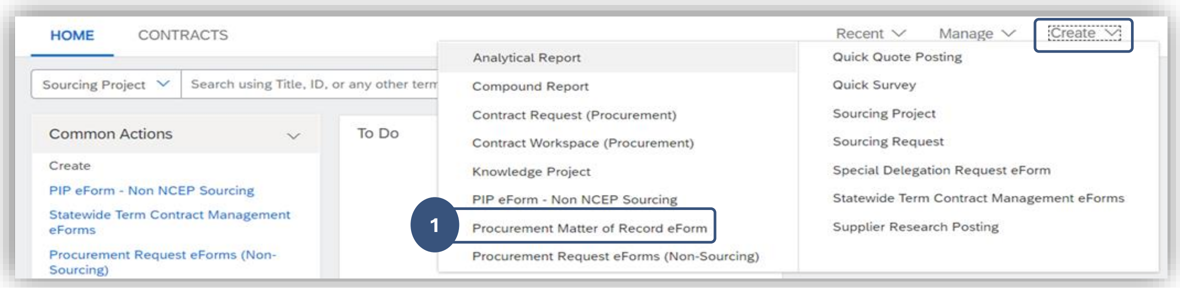
At the end of this job aid, **you will be able to**:

- Initiate an eForm.
- Fill out fields on the Procurement Matter of Record eForm.
- Upload files and complete the Procurement Matter of Record eForm.

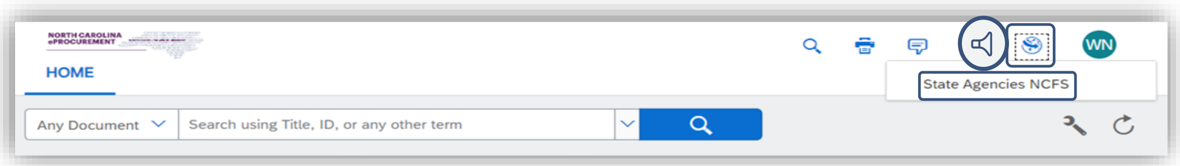
Procurement Matter of Record eForm

Initiating the eForm

1. To access the eForm, select **Procurement Matter of Record eForm** from the **Create** menu in NCFS Expert View. This brings up the **Procurement Matter of Record eForm** page.



Users not already logged into the NCFS realm of NCEP can navigate there by clicking the globe icon in the top right of the screen and selecting **State Agencies NCFS** from the dropdown.



Completing the Procurement Matter of Record eForm

2. Users will complete three sections in the **Procurement Matter of Record eForm**.

   After selecting the **Procurement Matter of Record eForm** option, the **Requester Information** section will display. Fields with asterisks next to them indicate required fields:

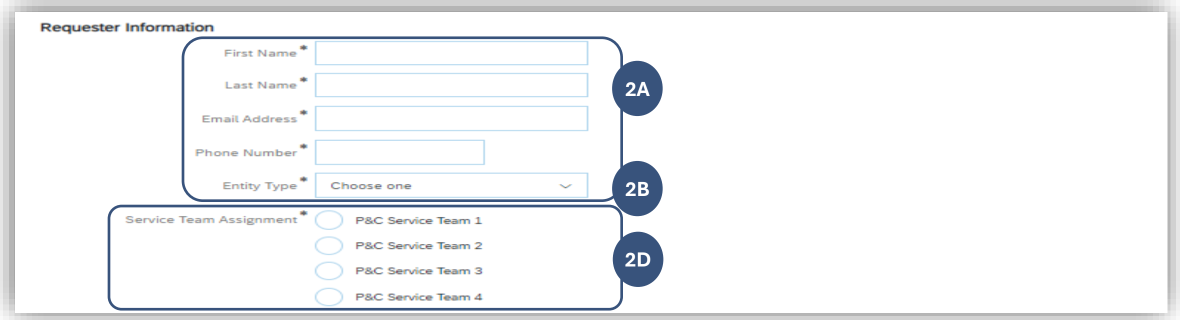
   A. Complete the four free-text fields indicating the user's contact information.

   B. Select the **Entity Type** from the dropdown field. Click the down arrow to reveal three options: **State Agency, Community College,** or **University**.

   C. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user's entity.

   D. Select the appropriate **Service Team Assignment** by clicking the radio button to the left of the P&C Service Team assigned to the user's entity.

P&C Service Teams provide a single point of contact for each agency and their procurement needs. If a user is unsure on which service team corresponds to their agency, more information can be accessed on **P&Cs Service Teams** page.



The **Procurement Record Details** section contains four fields. Fields with asterisks next to them indicate required fields:

E. The first field is a free-text box, requiring the user to **Describe items procured**.

F. In the **Select the corresponding UNSPSC Commodity Code** field, click the down arrow to search for and select the commodity code of the item(s) purchased. Commodity codes can be searched for by name or numerical ID.

> The menu displayed after clicking the down arrow will show the first 30 options as well as a message at the bottom of the list that states **Your search results exceed the limit. Change the search criteria to narrow your results.**

> Hovering over a selection from the dropdown will display more information to the right.

> Selecting **Browse…** at the bottom of the dropdown (or the icon to the right side of the field) will display a larger selection screen with more information.

> If a selection was made in error, it can be removed by clicking the **X** in the upper right.

G. In the **Purchase Date** field, use the date picker to indicate the date of purchase.

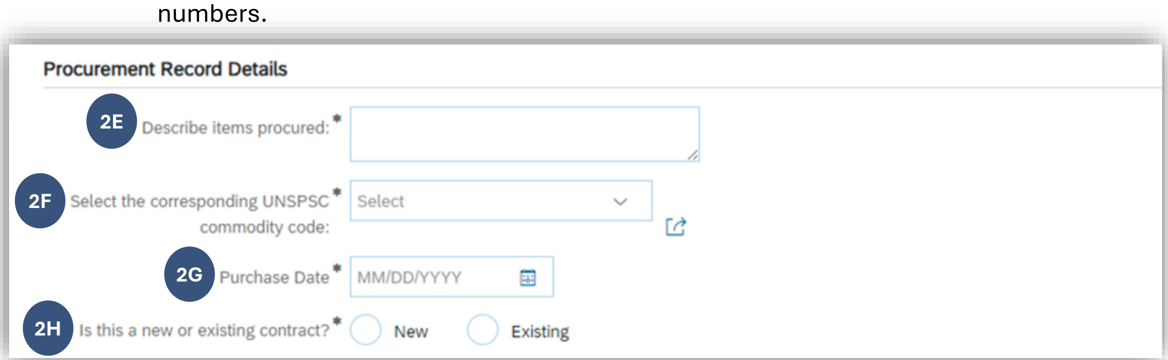
H. Using the radio buttons, answer the question **Is this a new or existing contract?**

I. If the selection is **New**, four additional required fields will display:

- **i.** Indicate in US Dollars the amount spent on the item(s) purchased in the **What is the purchase amount or cumulative contract value?** field. This field must be a number.
- **ii.** In the **Contract Term** field, click the radio button to the left of one of the five relevant date periods. If **Other** is selected, use the free-text box to indicate the term.
- **iii.** In the next two date fields, use date pickers to indicate the contract start and end dates.

J. If the selection is **Existing**, six additional required fields will display:

- **i.** In the first four date fields, use date pickers to indicate original and amended contract start and end dates.
- **ii.** In the next two fields, indicate in US Dollars the amount spent on the item(s) purchased requested value of the amendment and the cumulative contract total. These fields must be numbers.



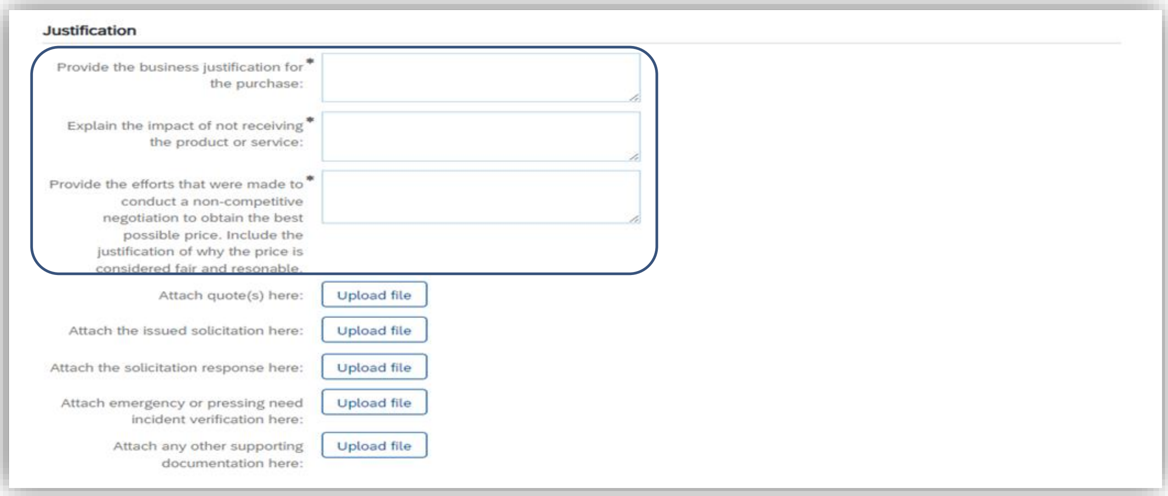
The **Justification** section contains three required fields and five options to upload supporting documents:

K. The first three fields are free-text boxes in which the user must provide information about why the purchase was made, the impact of not making the purchase, and what negotiations were conducted.

L. Below the three required fields, the user will find five options to upload various supporting documents if necessary. Click the **Upload file** button next to each field, click **Choose file**, select a local file, and click **Done**. Multiple files may be added if necessary.

To delete a document added in error, click the **X** to its right.

The maximum size for a single attachment is 10 MB. The total size of all attachments on a single form is limited to 30 MB.


Justification

Provide the business justification for the purchase: *

Explain the impact of not receiving the product or service: *

Provide the efforts that were made to conduct a non-competitive negotiation to obtain the best possible price. Include the justification of why the price is considered fair and resonable. *

Attach quote(s) here: Upload file

Attach the issued solicitation here: Upload file

Attach the solicitation response here: Upload file

Attach emergency or pressing need incident verification here: Upload file

Attach any other supporting documentation here: Upload file

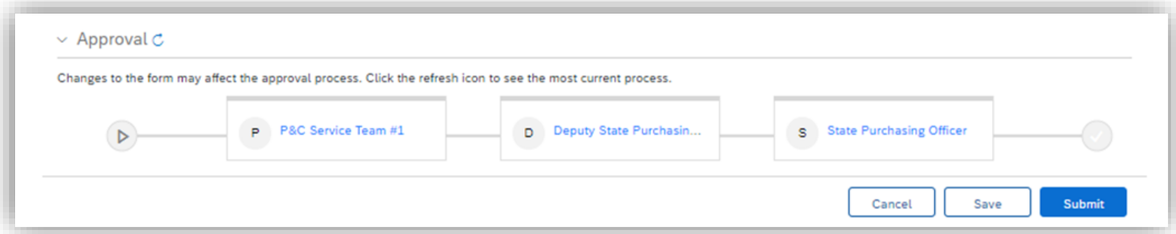
M. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **Approval** at the bottom of the screen. The approval flow will show that the eForm will be sent to the **P&C Service Team #X** selected in the **Requester Information** section, followed by the **Deputy State Purchasing Officer – Strategic Sourcing** and **State Purchasing Officer** approver groups.

N. Click **Submit** to send the eForm to P&C.

The system will indicate incomplete required fields by highlighting them in red.

At any time when creating a **Procurement Matter of Record** eForm, the user may opt to save the eForm to submit later by clicking the **Save** button at the bottom of the screen.

If a contract amount exceeds $1,000,000, an additional approver, **Deputy State Purchasing Officer – Legal**, will be involved in the approval flow.



O. After submitting the eForm, the user will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number beginning with **PMR**.

P. Click **Proceed** to view the request or find it in the **My Documents** portlet in **Submitted** status. At the bottom of the screen, the user may add comments or withdraw the eForm. If complete, select the **Exit** button.

P&C will review the eForm and either approve or deny it. Either way, notification will be given via email, and the updated status will display in the **My Documents** portlet.