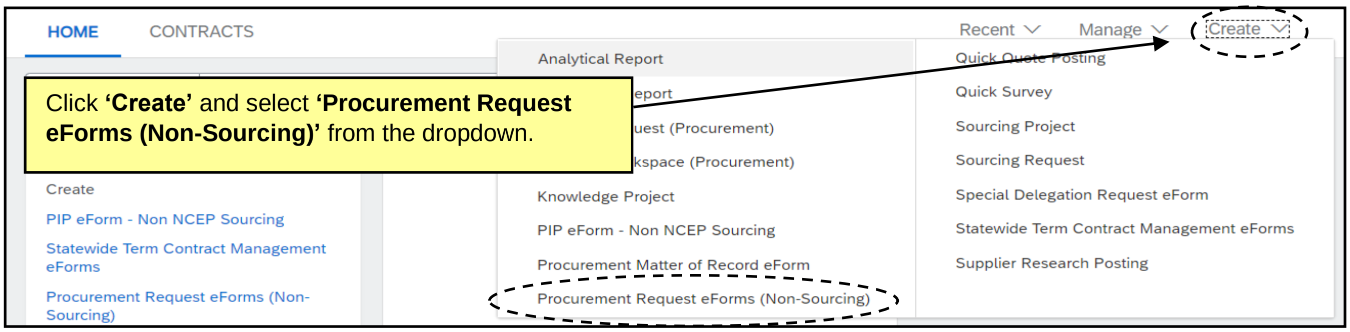
NC eProcurement

Procurement Request eForms (Non-Sourcing)

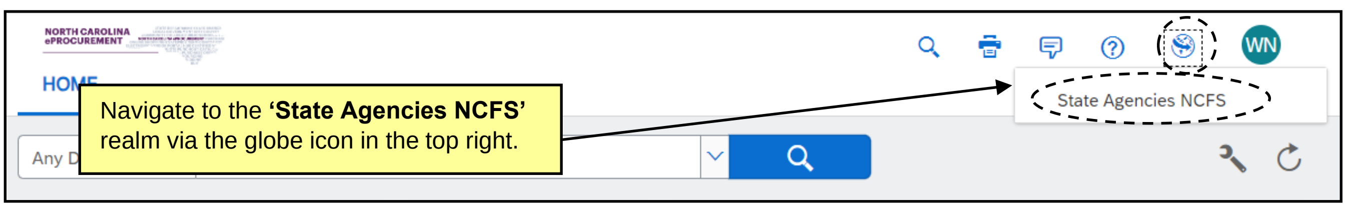
The **‘Procurement Request eForms (Non-Sourcing)’** are used by Non-NC eProcurement Sourcing agency users to submit six request forms regarding solicitations and contracts to P&C for approval: **‘Preliminary Review Request’, ‘Award Review Request’**, **‘Contract Modification Request’**, **‘Request for Extended Term Contract’, ‘Initiate Request for Negotiations of T&Cs’** and **‘Request BAFO Review’**. These eForms are only available in Expert View of the State Agencies NCFS realm of NC eProcurement (NCEP). To access these eForms, 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.

I. Initiating the eForm

1. To access the eForms, select **‘Procurement Request eForms (Non-Sourcing)’** from the **‘Create’** menu. The **‘Procurement Request eForms (Non-Sourcing)’** page.



Note: 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.



II. Completing the ‘Preliminary Review Request’ Form

Agency users who post solicitations via eVP will use this form to submit a preliminary review request to P&C.

1. After selecting the **‘Procurement Request eForms (Non-Sourcing)’** option, the **‘Requester Information’** section will display. Fields with asterisks next to them indicate required fields.

   a. Begin by populating the free-text box **‘Title’** field to provide P&C with a description of the solicitation.

   b. Next, complete the four free-text fields indicating the user’s contact information.

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

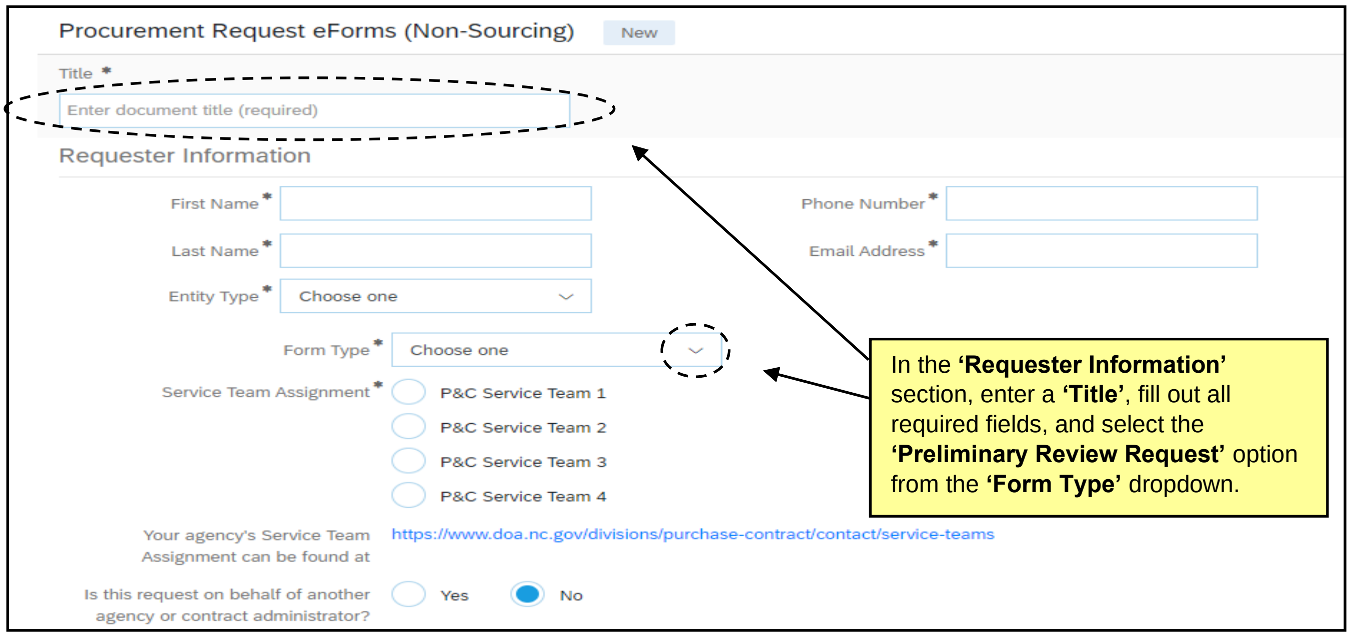
   d. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user’s entity.

e. In the **'Form Type'** field, click the down arrow and select **'Preliminary Review Request'**. Two new sections will display at the bottom of the form.

f. 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.

Note: 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&C's Service Teams](https://www.doa.nc.gov/divisions/purchase-contract/contact/service-teams) page.

g. The last field asks a **'Yes'** or **'No'** question to indicate if this request is being made on behalf of another agency. If **'No'** is selected, move to the next section. If **'Yes'** is selected, five additional fields will display in which the user can provide information about the other **'Contract Administrator'**.



2. The **'Preliminary Review Request'** section contains ten fields and an opportunity to upload supporting documents to form the review request.

a. Select either **'IFB'**, **'RFP'**, or **'RFQ'** in the **'What is the solicitation type?'** field.

b. The second field is a free-text box field asking the user to provide the **'Solicitation Number'**.

c. The next two fields allow the user to **'Attach the solicitation document'** and **'Attach the Bid Evaluation Matrix'**. Templates to download, complete, and save will be provided in the **'Reference documents'** section. When completed, click the **'Upload file'** button, select **'Choose file'**, find the completed file, and click **'Done'**. Multiple files may be added if necessary.

Notes:
- Only the solicitation document is required if **'RFQ'** was selected.
- 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.

d. The next two free-text box fields allow the user to **‘Enter the solicitation title and description’** and **‘Enter solicitation justification’**.

e. In the next two date fields, use the date pickers to indicate anticipated purchase start and end dates.

f. The next field is a free-text box in which the user can indicate in US Dollars the **‘Estimated cumulative contract values including renewal options’**. This field must be a number.

g. In the **‘Select the contract term’** field, indicate the term length by clicking the radio button to the left of one of four relevant date periods. If **‘Other’** is selected, use the free-text box to indicate the term.

h. The next field asks a **‘Yes’** or **‘No’** question to indicate if the contract term is greater than three years. If **‘No’** is selected, move to the next question. If **‘Yes’** is selected, use the **‘Upload file’** button to **‘Attach the SPO approval memo for the extended contract term’**.

i. The **‘Special Circumstances’** field is not a mandatory field, so users can skip this field if this request is for a standard solicitation, but if one of the following situations pertains to the solicitation, click the dropdown arrow and select from these options:

- **‘Brand Specific Request’**
- **‘Consultant Services Request’**
- **‘Waiver of Competition Request’**

j. If a special circumstance is selected, an additional field will display asking the user to **‘Upload the XXX Request’**. Below the **‘Upload file’** button, a grey box will provide a link to the template for the special request being made. Download the template, fill it out, save a local copy, then click the **‘Upload file’** button, click **‘Choose file’**, select the completed template, and click **‘Done’**.

Notes:

- 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.

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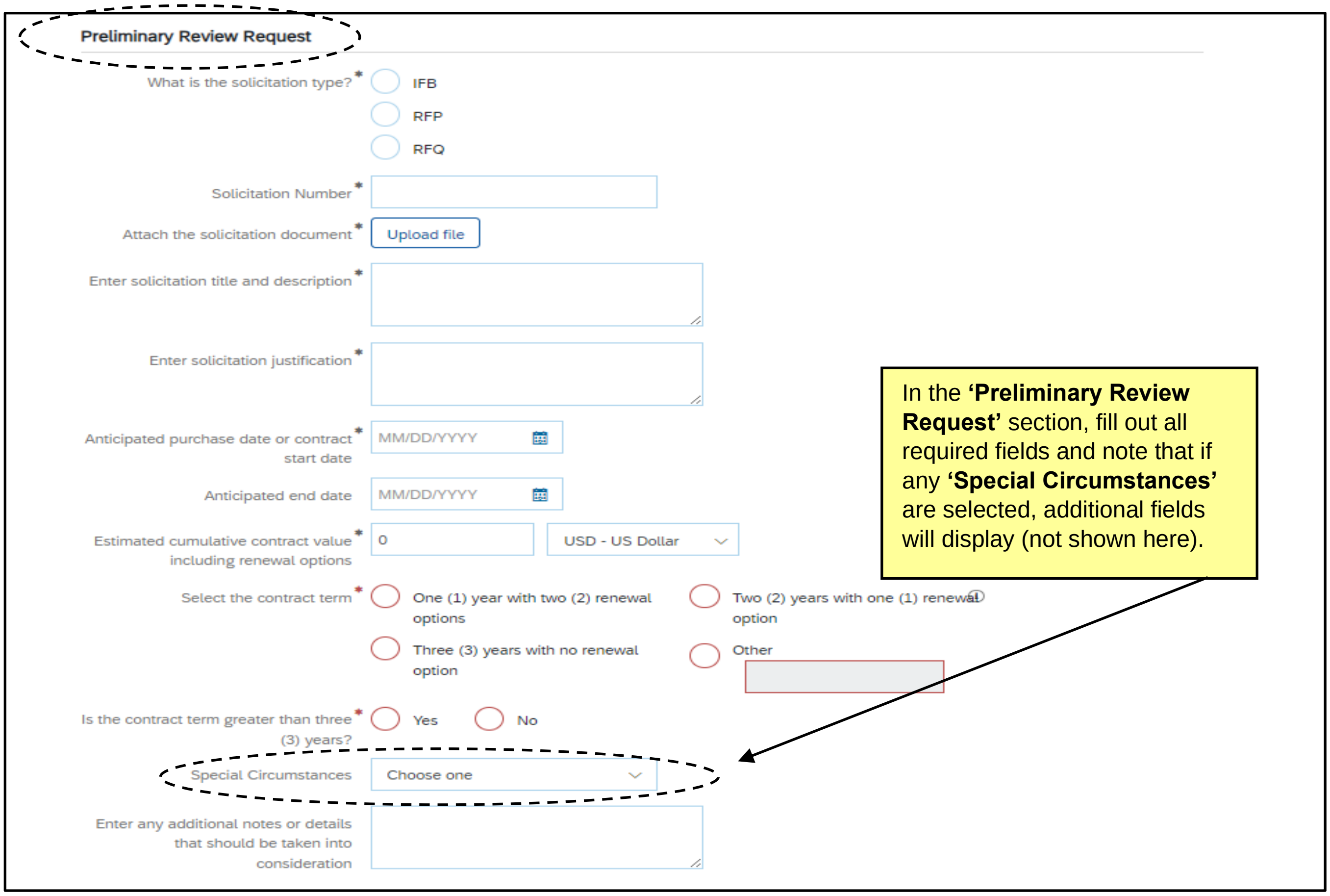
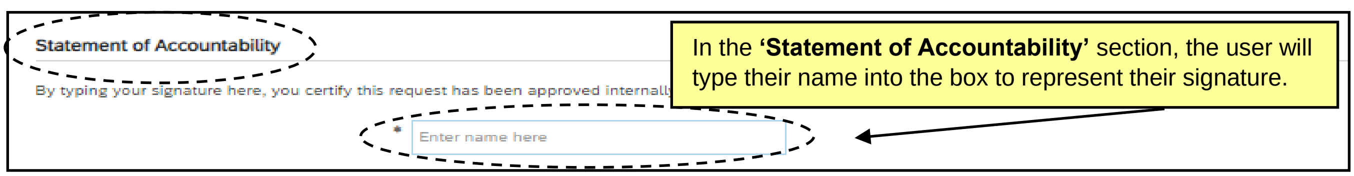
k. The final field is a free-text box where the user can **‘Enter any additional notes or details that should be taken into consideration’**.



3. The **'Statement of Accountability'** section contains just one field.

    a. The user should type their name into the single free-text box to represent a signature indicating the request has been approved internally for Procurement leadership.



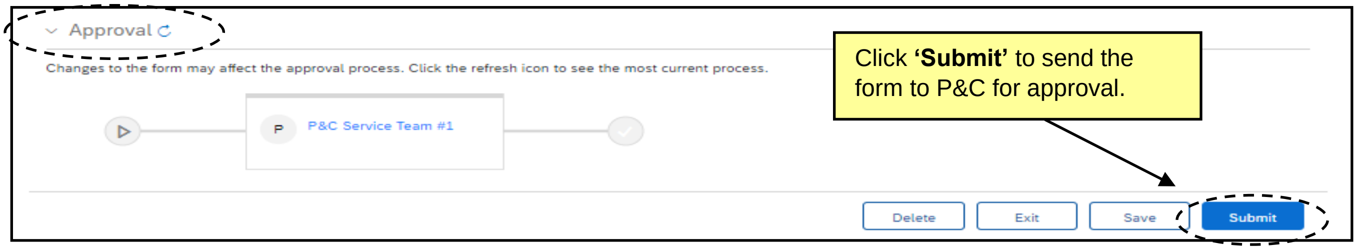
4. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the **'P&C Service Team #X'** selected in the **'Requester Information'** section.

    Note: Additional P&C approver groups will be added to the approval flow when the contract value surpasses established dollar thresholds.

5. Click **'Submit'** to send the eForm to P&C.

    Notes:

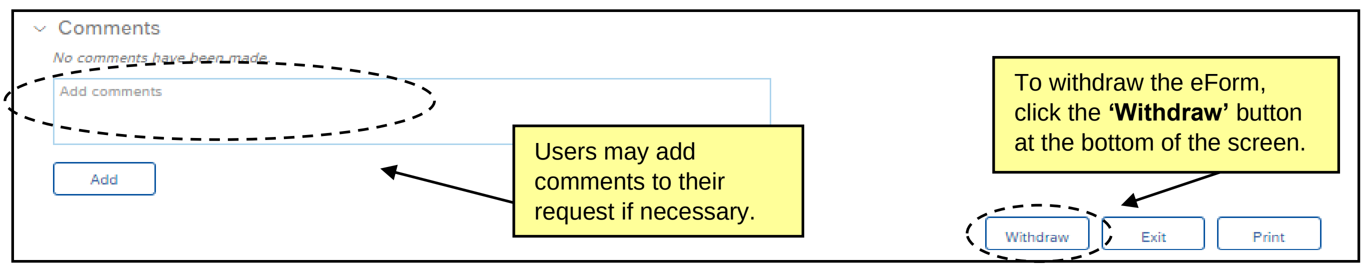
    - If any required fields are incomplete, the system will indicate them by highlighting them in red.
    - At any time when creating an **'Preliminary Review Request'** eForm, the user may opt to save the eForm to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



6. 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 **'PRF'**.

7. 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 and either approve or deny the eForm. Notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



III. Completing the 'Award Review Request' Form

Agency users who post solicitations via eVP will use this form to submit an award approval request to P&C.

1. After selecting the **'Procurement Request eForms (Non-Sourcing)'** option, the **'Requester Information'** section will display. Fields with asterisks next to them indicate required fields.

   a. Complete the free-text box **'Title'** field to provide P&C with a description of award approval being requested.

   b. Populate the four free-text fields indicating the user's contact information.

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

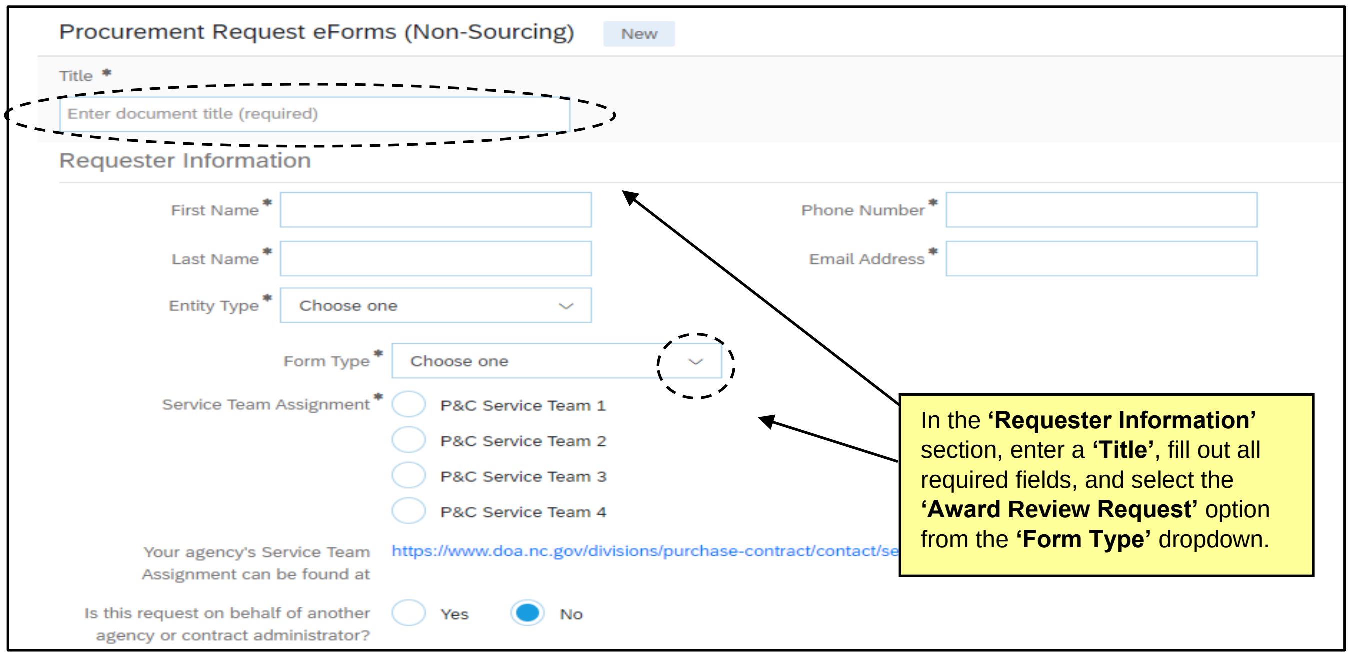
   d. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user's entity.

   e. In the **'Form Type'** field, click the down arrow and select **'Award Review Request'**. Five new sections will display at the bottom of the form.

   f. 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.

Note: 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&C's Service Teams page.

g. The last field asks a **'Yes'** or **'No'** question to indicate if this request is being made on behalf of another agency. If **'No'** is selected, move to the next section. If **'Yes'** is selected, five additional fields will display after a brief pause in which the user can provide information about the other **'Contract Administrator'**.



2. The **'Solicitation Details'** section contains numerous fields and multiple options to upload supporting documents to describe the nature of the solicitation.

   a. The first field allows the user to indicate the solicitation type by clicking the radio button to the left of the relevant solicitation type. The options are '**IFB'**, **'RFP'**, or **'RFQ'**.

   b. The next two fields are free-text boxes where the user will indicate the **'Solicitation Number'** and include a description.

   c. In the **'UNSPSC Commodity Code'** field, click the down arrow to search for and select the commodity code of the solicitation. Commodity codes can be searched for by name or numerical ID.

   Notes:
   - 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 in a box 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.

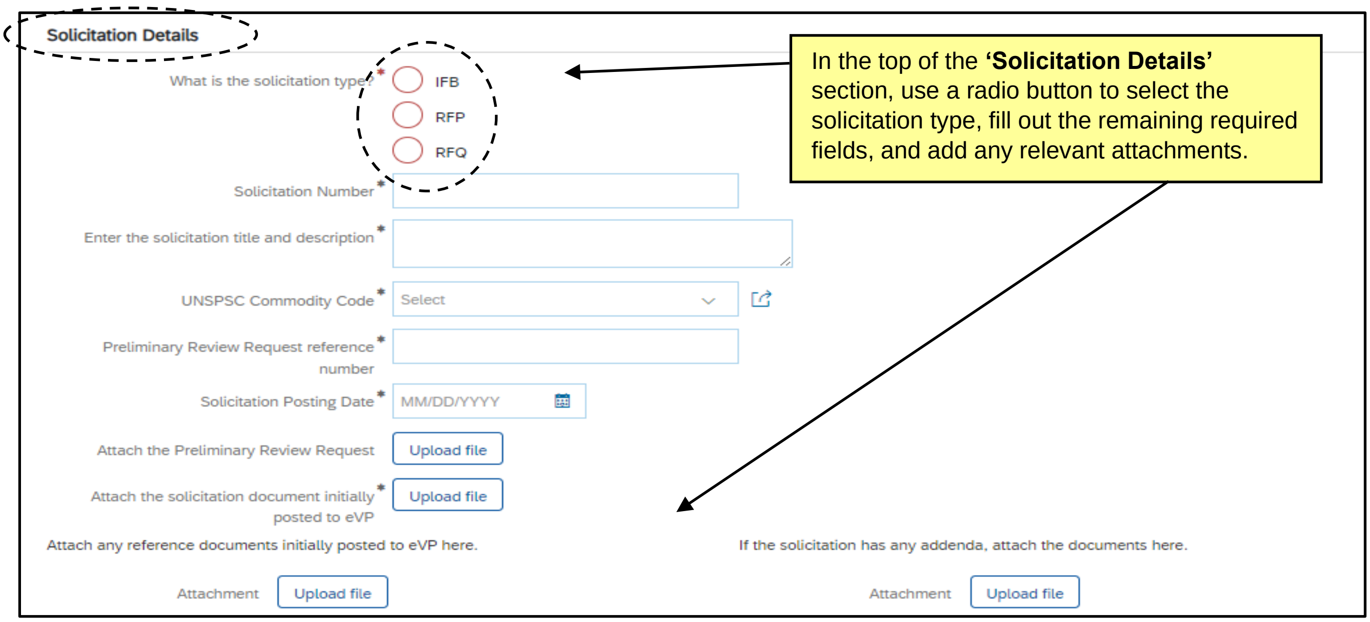
d. In the **'Preliminary Review Request reference number'** field, enter the number of a previous PIP request or the ID number assigned to a submitted **'Preliminary Review Request'** eForm, starting with **'PRF'**.

e. Use the date picker to indicate the **'Solicitation Posting Date'**.

f. The next four fields allow the user to attach various documents. Click the **'Upload file'** button, select **'Choose file'**, choose a local file, and click **'Done'**. Multiple files may be added if necessary.

Notes:

- 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.



g. Below the attachment fields, in the next two free-text box fields, enter the number of bid responses received and accepted.

h. In the next date field, use the date picker to indicate the bid opening date.

i. The next two free-text box fields allow the user to provide information about rejected vendors.

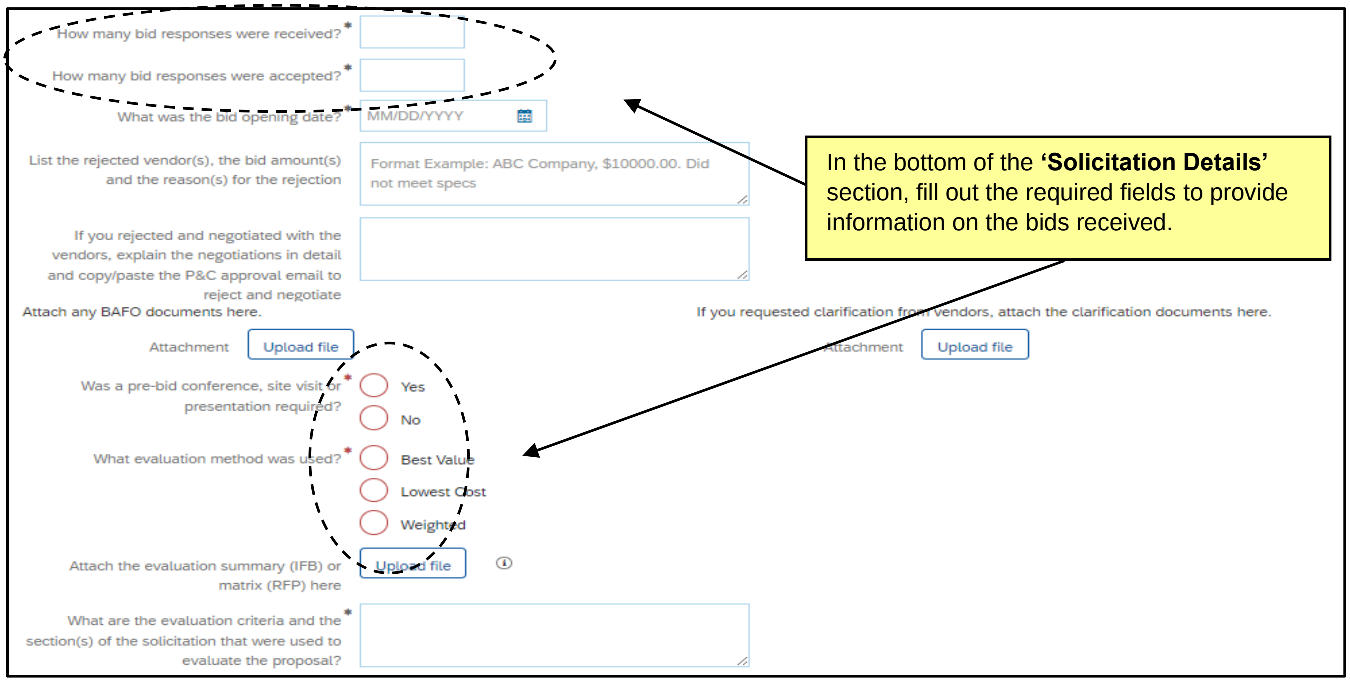
j. The user has two opportunities to provide any BAFO or clarification documents that were a part of the negotiation process. See **step f** in this section for instructions on attaching documents.

k. Select **'Yes'** or **'No'** in the next field to indicate if a pre-bid meeting was required for this solicitation. If **'No'** is selected, move to the next field. If **'Yes'** is selected, two additional fields will display after a brief pause in which the user can provide information about that meeting.

l. The next field allows the user to indicate **'What evaluation method was used'** by clicking the radio button to the left of the relevant method.

m. Use the **'Update file'** button to **'Attach the evaluation summary (IFB) or matrix (RFP) here.'** This field is not required for RFPs. See **step f** in this section for instructions on attaching documents.

n. Finally, the user can describe in a free-text box the evaluation criteria used to evaluate the proposal.

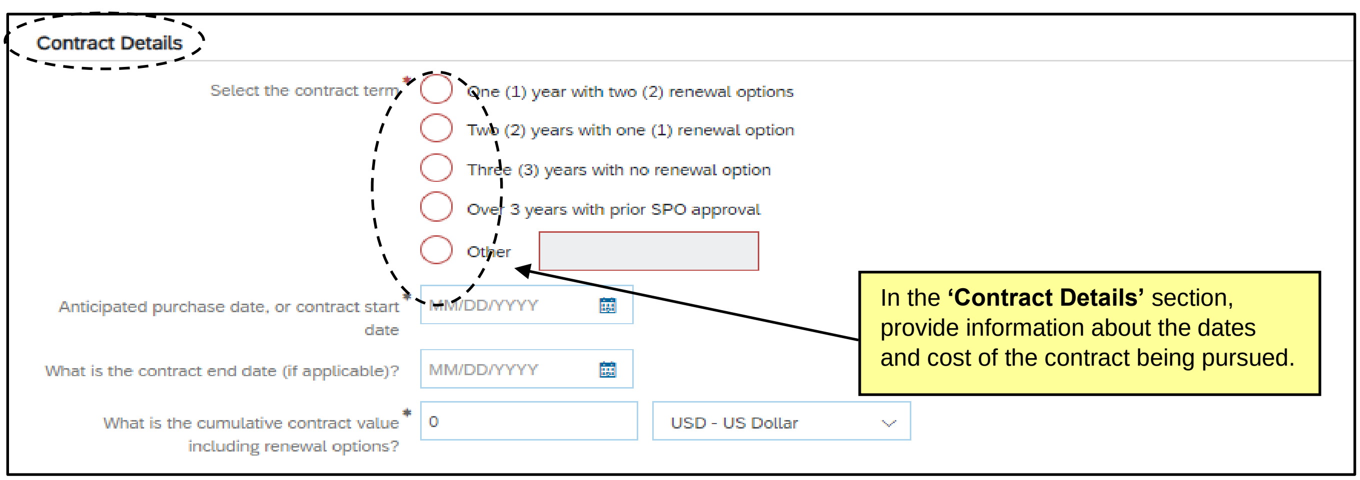


3. The **'Contract Details'** section contains four fields to describe the nature of the contract being pursued.

a. The first field allows the user to **'Select the contract term'** by clicking 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.

b. In the next two date fields, use date pickers to indicate the anticipated contract start and end dates.

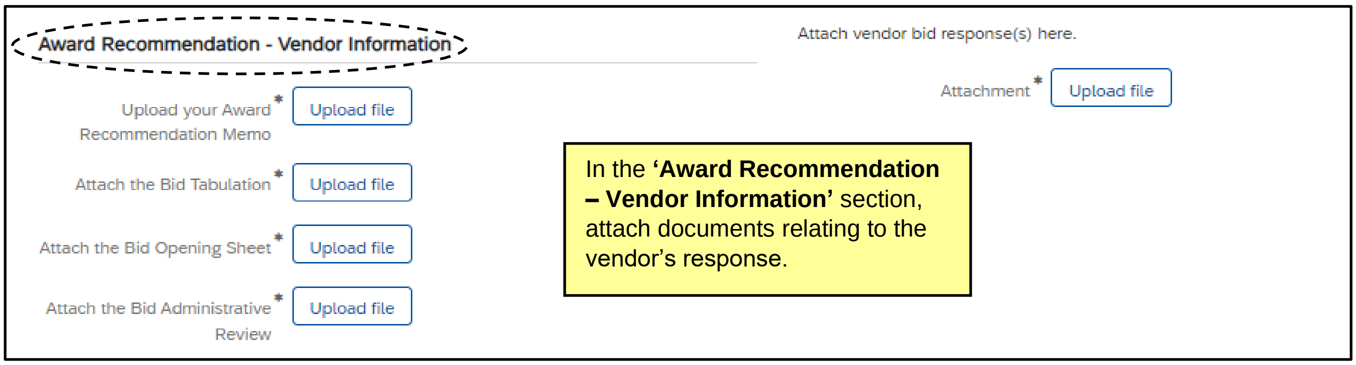
c. The final field is a free-text box in which the user can indicate in US Dollars the cumulative contract value including renewal options. This field must be a number.



4. The **‘Award Recommendation – Vendor Information’** section contains five required buttons to upload supporting documents identifying the recommended vendor and their bid responses.

    a. For the five fields in this section, click the **‘Upload file’** button, click **‘Choose file’**, select a local file, and click **‘Done’**. Multiple files may be added if necessary.

    Notes:
    - 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.

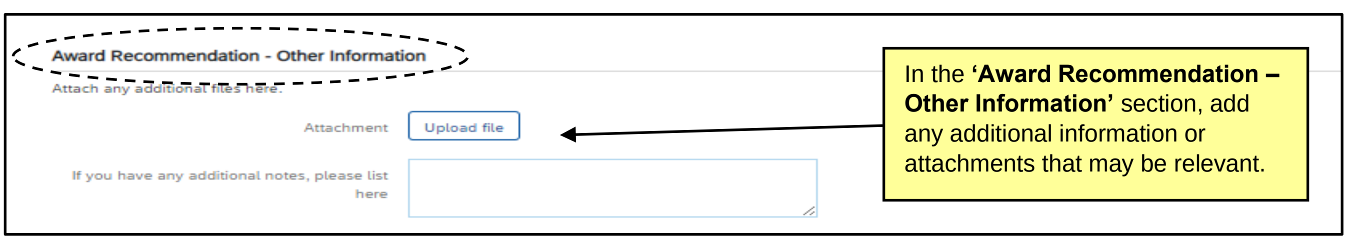


5. The next section is the **‘Award Recommendation – Other Information’** section which contains one free-text field and one button to upload supporting documents adding any other context to the request.

    a. The first field allows the user to **‘Attach any additional files here’**. Click the **‘Upload file’** button, click **‘Choose file’**, select a local file, and click **‘Done’**. Multiple files may be added if necessary.

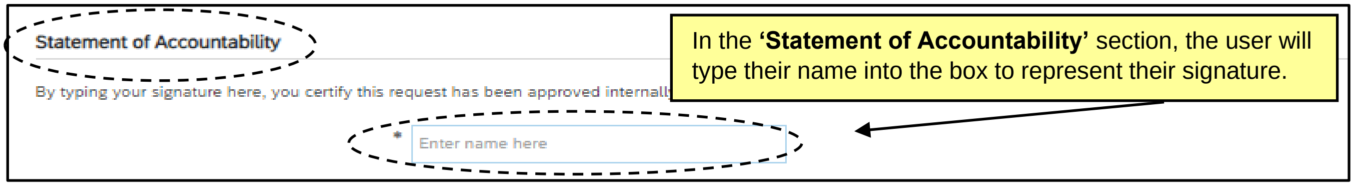
    Notes:
    - To delete a document added in error, click the **‘X’** to its right.
    - The maximum size for a single attachment is 10 MB. The total size of all attachments on a single form is limited to 30 MB.

    b. The other field is a free-text box allowing the user to provide any additional relevant notes.



6. The **'Statement of Accountability'** section contains just one field.

    a. The user should type their name into the single free-text box to represent a signature indicating the request has been approved internally for Procurement leadership.

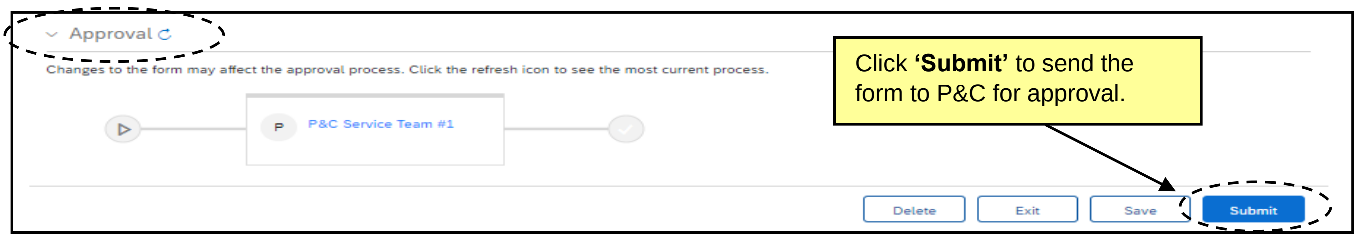


7. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the **'P&C Service Team #X'** selected in the **'Requester Information'** section.

    Note: Additional P&C approver groups will be added to the approval flow when the contract value surpasses established dollar thresholds.

8. Click **'Submit'** to send the eForm to P&C.

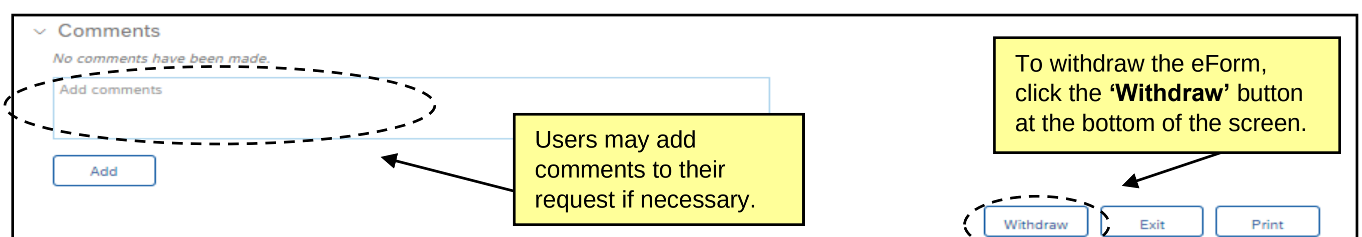
    Notes:
    - If any required fields are incomplete, the system will indicate them by highlighting them in red.
    - At any time when creating an **'Award Approval Request'** eForm, the user may opt to save the eForm to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



9. 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 **'PRF'**.

10. 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 and either approve or deny the eForm. Notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



IV. Completing the 'Contract Modification Request' Form

Agency users who do not use NC eProcurement Contracts will use this form to request contract modifications including amendments, extensions, and cancellation requests.

1. After selecting the **'Procurement Request eForms (Non-Sourcing)'** option, the **'Requester Information'** section will display. Fields with asterisks next to them indicate required fields.

   c. Populate the free-text box **'Title'** field to provide P&C with a description of the contract modification being requested.

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

   e. Populate the four free-text fields indicating the user's contact information.

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

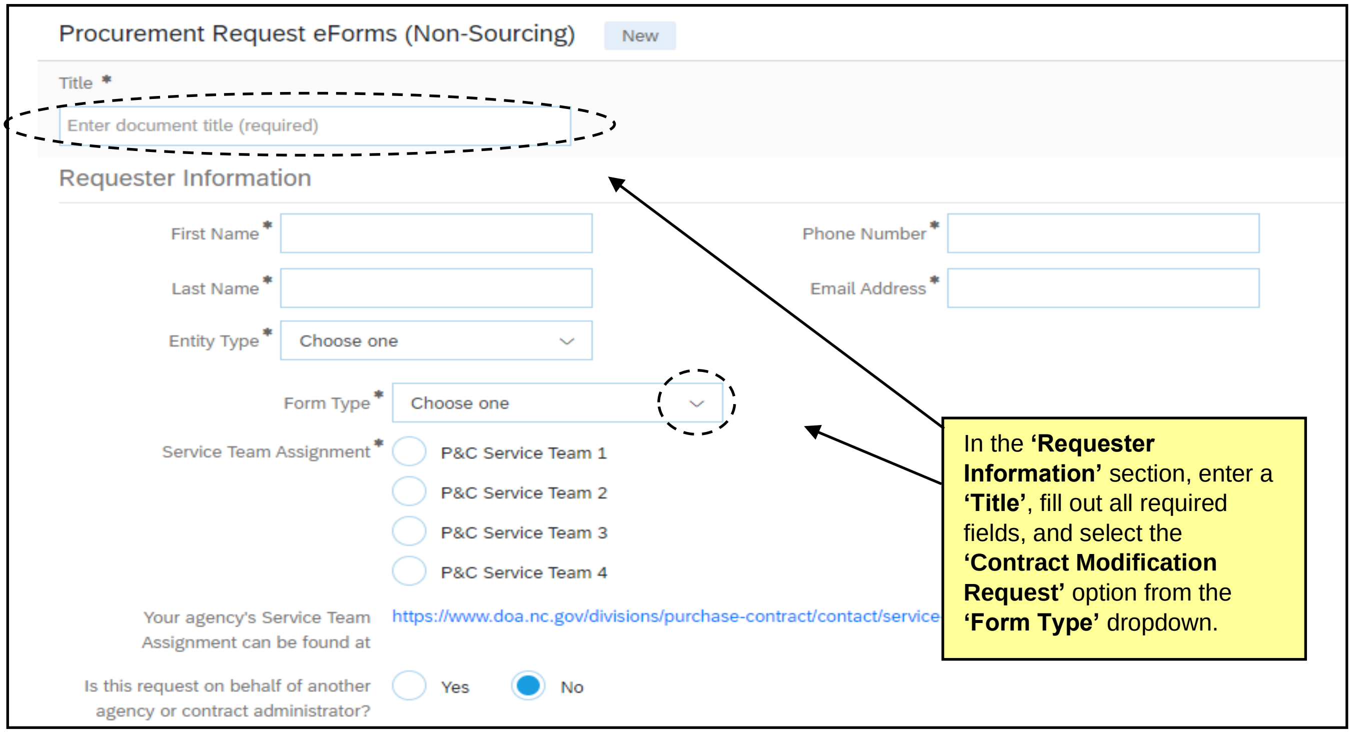
   e. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user's entity.

   f. In the **'Form Type'** field, click the down arrow and select **'Contract Modification Request'**. Four new sections will display at the bottom of the form.

   g. 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.

   Note: 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&C's Service Teams page.

   h. The last field asks a **'Yes'** or **'No'** question to indicate if this request is being made on behalf of another agency. If **'No'** is selected, move to the next section. If **'Yes'** is selected, five additional fields will display after a brief pause in which the user can provide information about the other **'Contract Administrator'**.



2. The next section is the **'Contract Details'** section which contains nine fields and three options to upload supporting documents to describe the nature of the contract.

   a. The first two fields are free-text box fields asking the user to **'Enter the agency solicitation number'** and **'Enter the contract title'**.

   b. In the **'UNSPSC Commodity Code'** field, click the down arrow to search for and select the commodity code of the solicitation. Commodity codes can be searched for by name or numerical ID.

      Notes:
      - 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 in a box 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.

   c. The next field is a free-text box where the user will **'Enter the solicitation/contract description'**.

   d. The next two fields are free-text boxes in which the user can indicate in US Dollars the current and possible cumulative contract values including all exercised options. These fields must be a number.

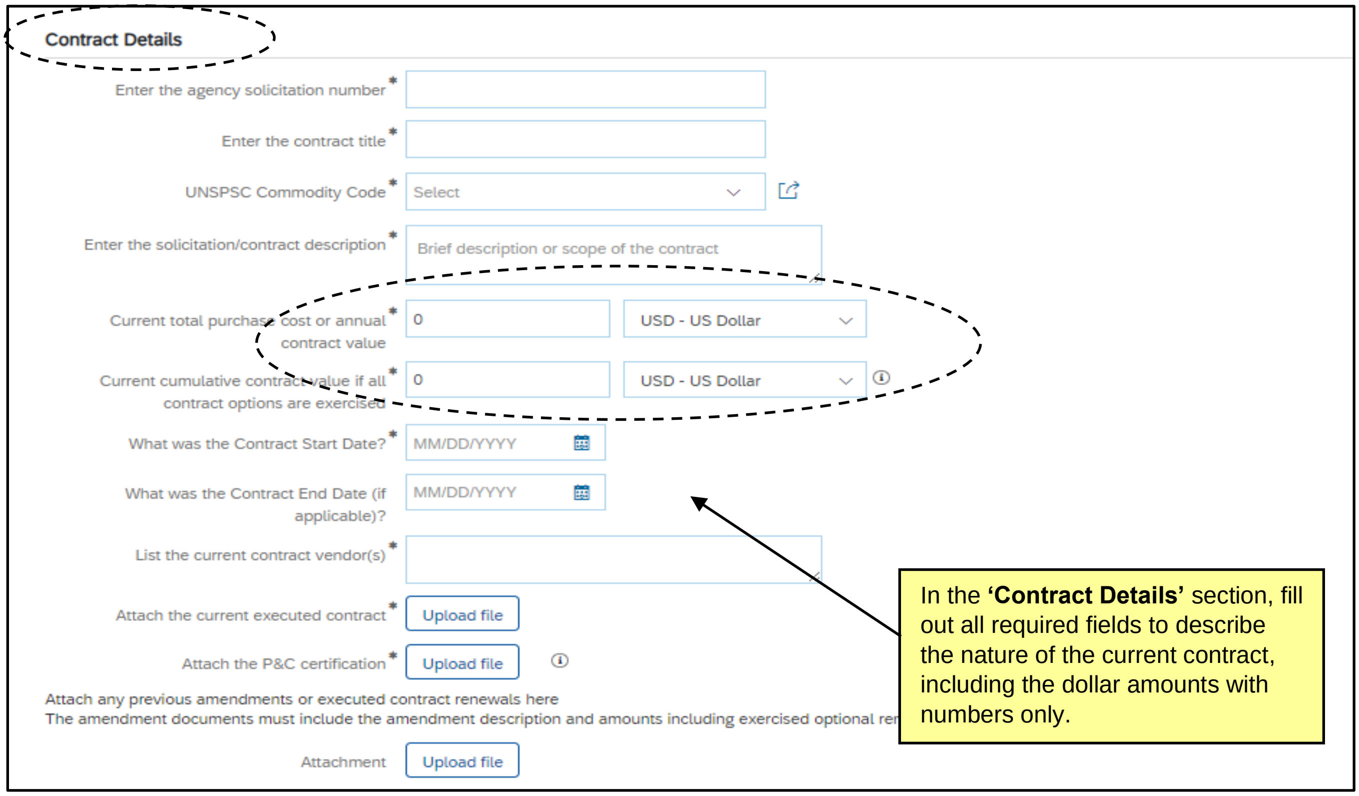
   e. In the next two date fields, use the date pickers to indicate the Contract start and end dates.

   f. **'List the current contract vendor(s)'** in the last free-text box.

g. The final three fields allow the user to attach copies of the current contract, P&C certification, and any previous amendment documents. Click the **'Upload file'** button, click **'Choose file'**, select a local file, and click **'Done'**. Multiple files may be added if necessary.

Notes:

- 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.



3. The **'Contract Modification Details'** section contains seven fields and two options to upload supporting documents to describe the nature of the modification being requested.

   a. The first field asks which type of modification is being requested. Click the radio button to the left of one of the two options, **'Cancellation'** or **'Contract Amendment (includes increases/extension)'**.

   b. The next two free-text box fields allow the user to justify their request and provide details of the contract amendment terms.

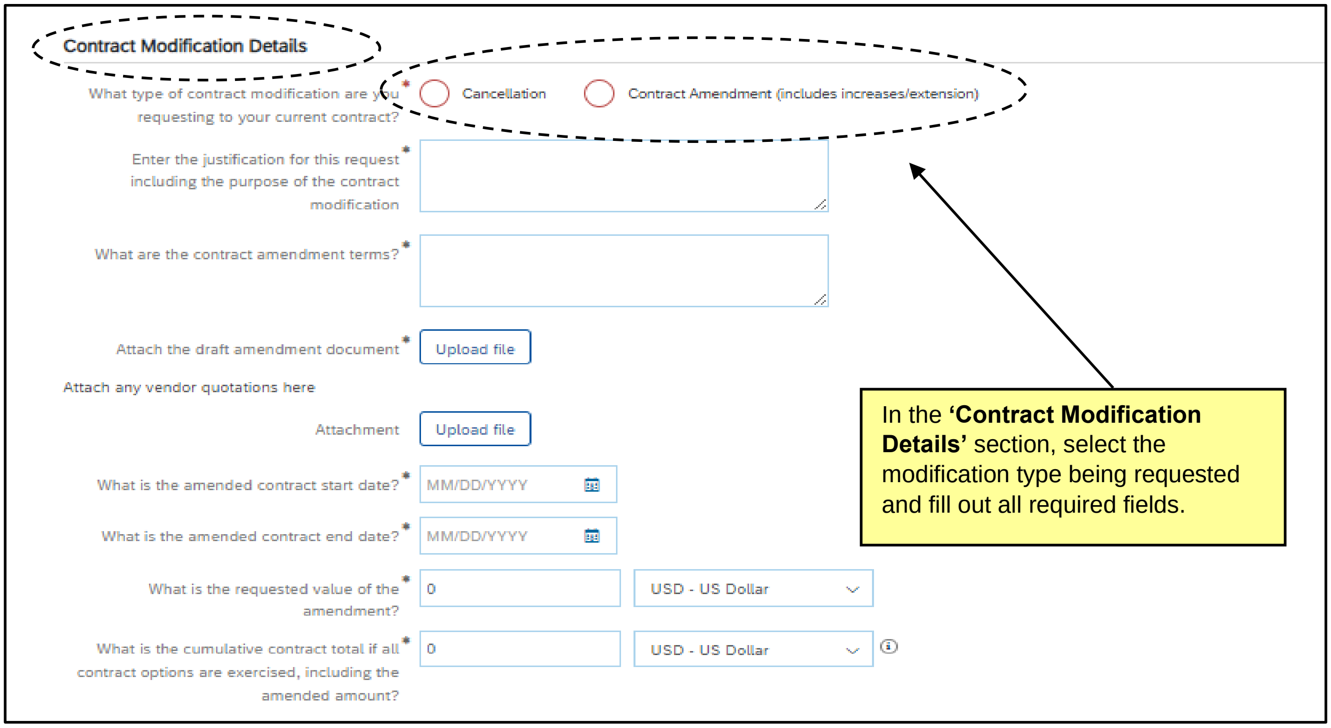
   c. The next two fields allow the user to **'Attach the draft amendment document'** and any vendor quotations. Click the **'Upload file'** button, click **'Choose file'**, select a local file, and click **'Done'**. Multiple files may be added if necessary.

   Notes:

   - 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.

d. In the next two date fields, use the date pickers to indicate the amended contract start and end dates.

e. The last two fields are free-text boxes in which the user can indicate in US Dollars the requested value of the amendment and the possible cumulative contract values including all exercised options. These fields must be a number.



4. The **'Supporting Information & Documents'** section contains one field and an option to upload supporting documents to provide additional information for the requested modification.

a. The first field is a free-text box allowing the user to provide any additional relevant notes.

b. The other field allows the user to **'Attach any additional supporting documents here'**. Click the **'Upload file'** button, click **'Choose file'**, select a local file, and click **'Done'**. Multiple files may be added if necessary.

Notes:

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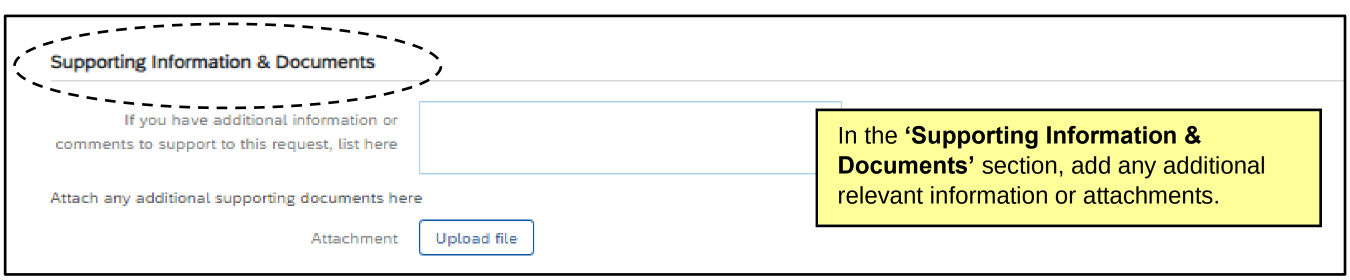
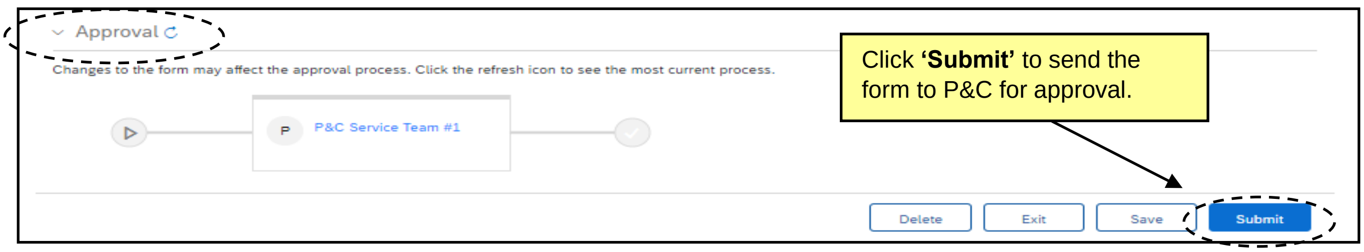


5. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the **'P&C Service Team #X'** selected in the **'Requester Information'** section.

   Note: Additional P&C approver groups will be added to the approval flow when the contract value surpasses established dollar thresholds.

6. Click **'Submit'** to send the eForm to P&C.

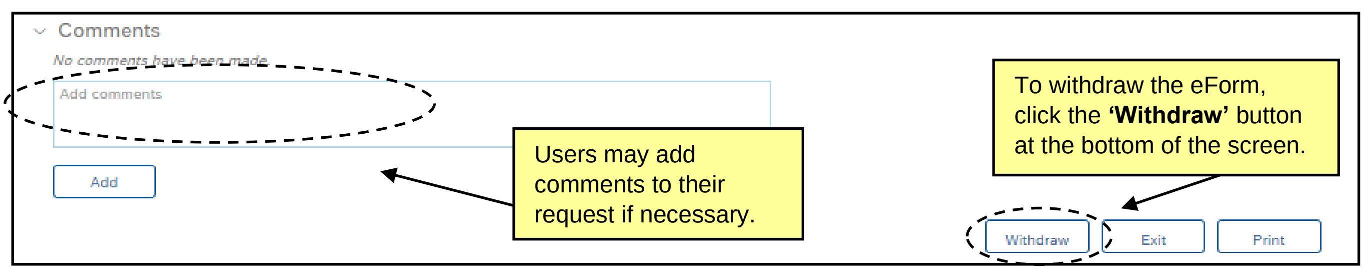
   Notes:
   - If any required fields are incomplete, the system will indicate them by highlighting them in red.
   - At any time when creating an **'Contract Modification Request'** eForm, the user may opt to save the eForm to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



7. 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 **'PRF'**.

8. 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 and either approve or deny the eForm. Notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



V. Completing the 'Request for Extended Contract Term' Form

Agency users who do not use NC eProcurement Contracts will use this form to request approval from P&C of a contract term of more than 3 years.

1. After selecting the **'Procurement Request eForms (Non-Sourcing)'** option, the **'Requester Information'** section will display. Fields with asterisks next to them indicate required fields.

   a. Populate the free-text box **'Title'** field to provide P&C with a description of the request.

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

   c. Populate the four free-text fields indicating the user's contact information.

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

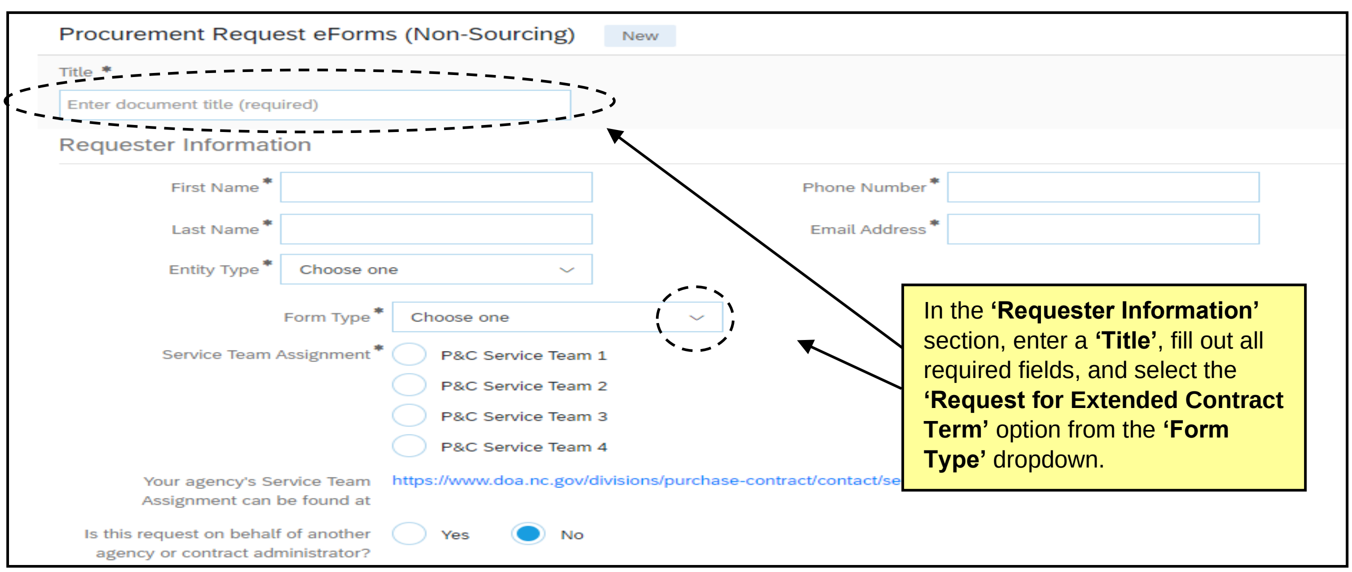
   e. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user's entity.

   f. In the **'Form Type'** field, click the down arrow and select **'Request for Extended Contract Term'**. Two new sections will display at the bottom of the form.

   g. 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.

      Note: 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&C's Service Teams](#) page.

   h. The last field asks a **'Yes'** or **'No'** question to indicate if this request is being made on behalf of another agency. If **'No'** is selected, move to the next section. If **'Yes'** is selected, five additional fields will display after a brief pause in which the user can provide information about the other **'Contract Administrator'**.



2. The next section is the **'Contract Details'** section which contains nine fields and an opportunity to upload supporting documents to explain why additional years are required.

   a. The first three fields are free-text box fields asking the user to provide the **'Contract ID'**, **'Contract Title'**, and **'Contract Description'** for the contract in question.

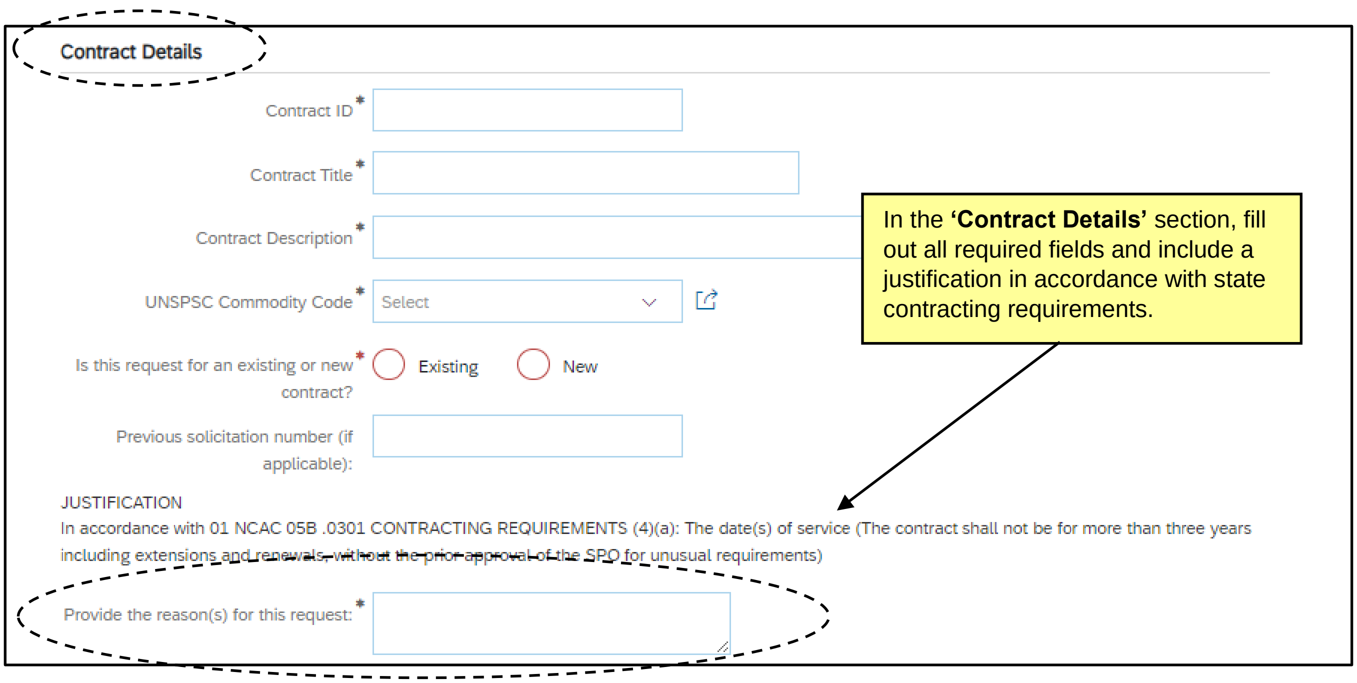
   b. In the **'UNSPSC Commodity Code'** field, click the down arrow to search for and select the commodity code of the solicitation. Commodity codes can be searched for by name or numerical ID.

      Notes:
      - 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 in a box 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.

   c. The next field asks **'Is this request for an existing or new contract?'** If **'Existing'** is selected from the radio buttons, four additional fields will display. Use date pickers to indicate the existing contract dates and a free-text box to indicate the total number of years being requested. This field must be a number. If **'New'** is selected, choose **'Yes'** or **'No'** to indicate if the request is for a renewal option and use the free-text box to indicate the total number of years being requested.

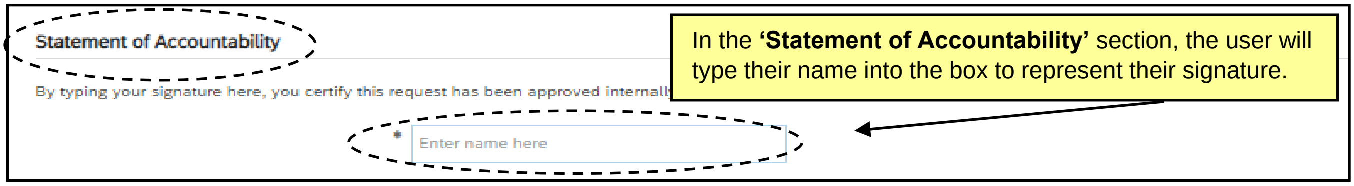
   d. In the next free-text box, list the **'Previous solicitation number (if applicable)'**.

   e. The last free-text box gives the user an opportunity to provide justification for their request.



3. The **‘Statement of Accountability’** section contains just one field.

    a. The user should type their name into the single free-text box to represent a signature indicating the request has been approved internally for Procurement leadership.

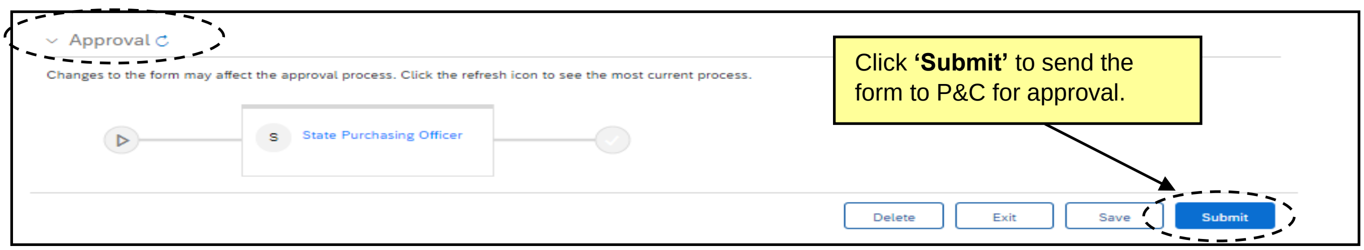


4. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **‘Approval’** at the bottom of the screen. The approval flow will show that the eForm will be routed to the **‘State Purchasing Officer’** group.

    Note: Additional P&C approver groups will be added to the approval flow when the contract value surpasses established dollar thresholds.

5. Click **‘Submit’** to send the eForm to P&C.

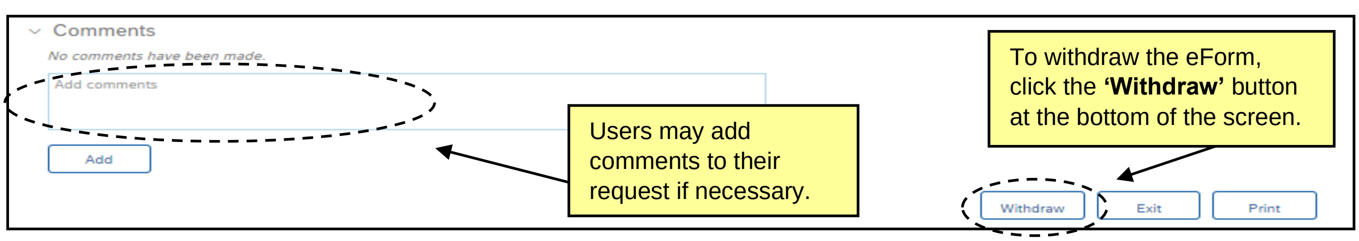
    Notes:
    - If any required fields are incomplete, the system will indicate them by highlighting them in red.
    - At any time when creating an **‘Preliminary Review Request’** eForm, the user may opt to save the eForm to submit at a later time by clicking the **‘Save’** button at the bottom of the screen.



6. 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 **‘PRF’**.

7. 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 and either approve or deny the eForm. Notification will be given via email, and the updated status will display in the **‘My Documents’** portlet.



VI. Completing the 'Initiate Request for Negotiations of T&Cs' Form

Agency users who post solicitations via eVP will use this form to request that P&C Legal facilitate negotiations when there are exceptions to Terms and Conditions.

1. After selecting the **'Procurement Request eForms (Non-Sourcing)'** option, the **'Requester Information'** section will display. Fields with asterisks next to them indicate required fields.

   a. Begin by populating the free-text box **'Title'** field to provide P&C with a description of the request.

   b. Next, complete the four free-text fields indicating the user's contact information.

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

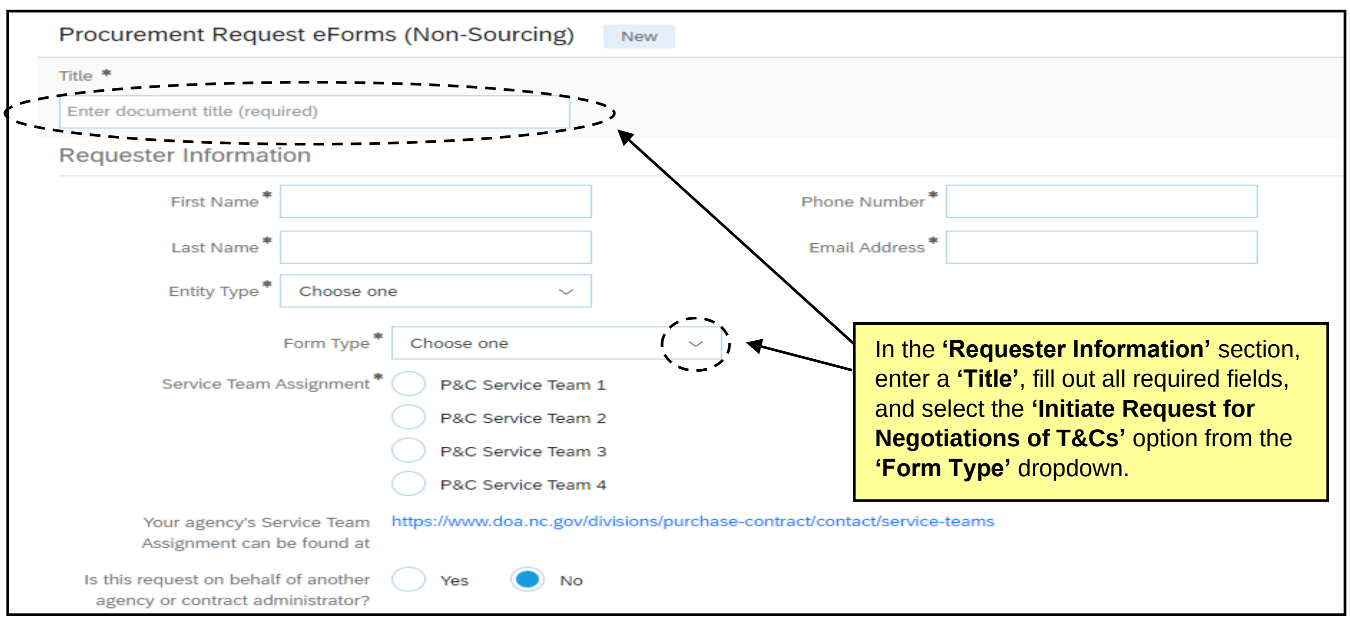
   d. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user's entity.

   e. In the **'Form Type'** field, click the down arrow and select **'Initiate Request for Negotiations of T&Cs'**. A new section will display at the bottom of the form.

   f. 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.

      Note: 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&C's Service Teams](https://www.doa.nc.gov/divisions/purchase-contract/contact/service-teams) page.

   g. The last field asks a **'Yes'** or **'No'** question to indicate if this request is being made on behalf of another agency. If **'No'** is selected, move to the next section. If **'Yes'** is selected, five additional fields will display in which the user can provide information about the other **'Contract Administrator'**.



3. The **'Initiate Request for Negotiations of T&Cs'** section contains three fields and an opportunity to upload supporting documents to form the request.

   a. The first field is a free-text box field asking the user to provide the **'Solicitation Number'**.

   b. The next free-text box field allows the user to enter the **'Solicitation Title and Description'**.

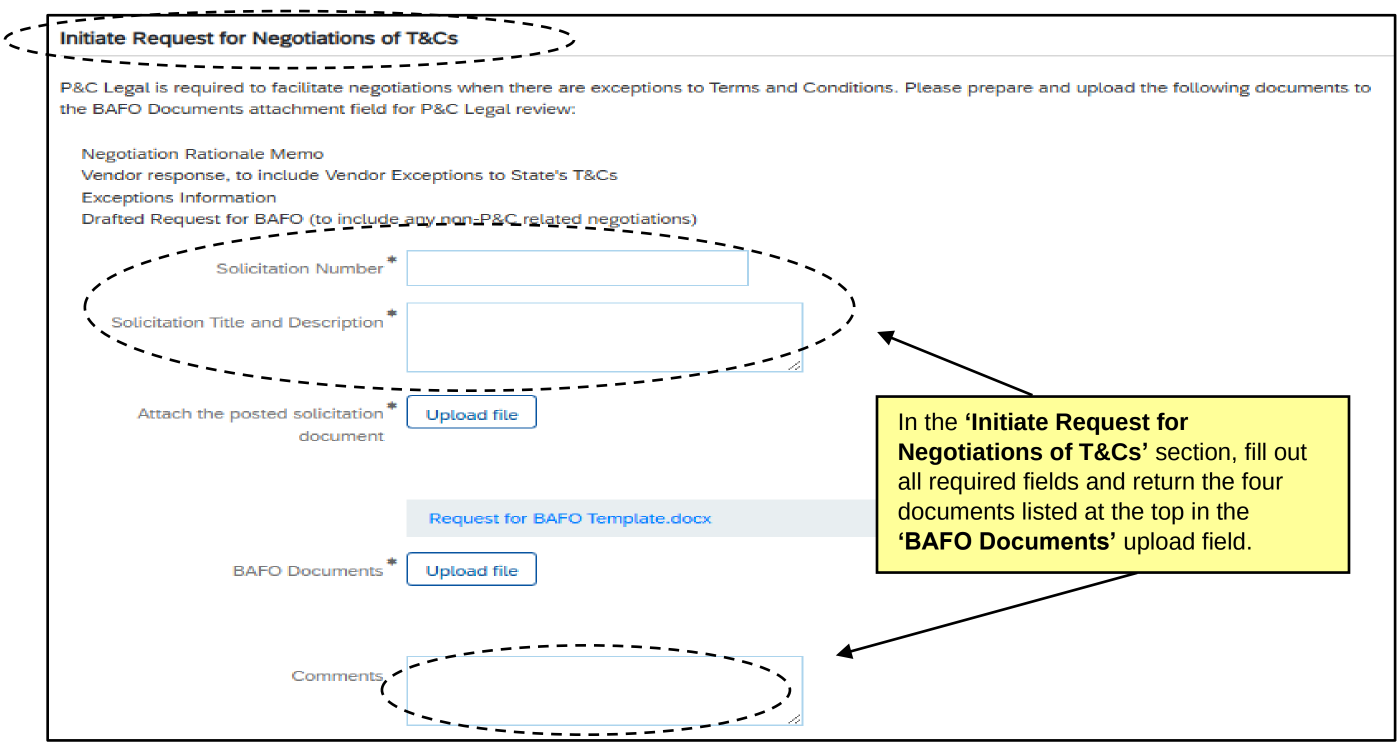
   c. The next field allows the user to **'Attach the posted solicitation document'**. Click the **'Upload file'** button, select **'Choose file'**, choose a local file, and click **'Done'**. Multiple files may be added if necessary.

   d. In the **'BAFO Documents'** field, the user should download, complete, and upload the **'Request for BAFO Template'** document located just above the **'Upload file'** button, as well as the four documents referenced at the top of the section:

      - **Negotiation Rationale Memo**
      - **Vendor response, to include Vendor Exceptions to State's T&Cs**
      - **Exceptions Information**
      - **Drafted Request for BAFO (to include any non-P&C related negotiations)**

      After the first document is uploaded, click **'Add more files'** to continue adding all requisite files.

   e. In the final free-text **'Comments'** field, add any comments to help further explain the situation to P&C Legal if necessary.

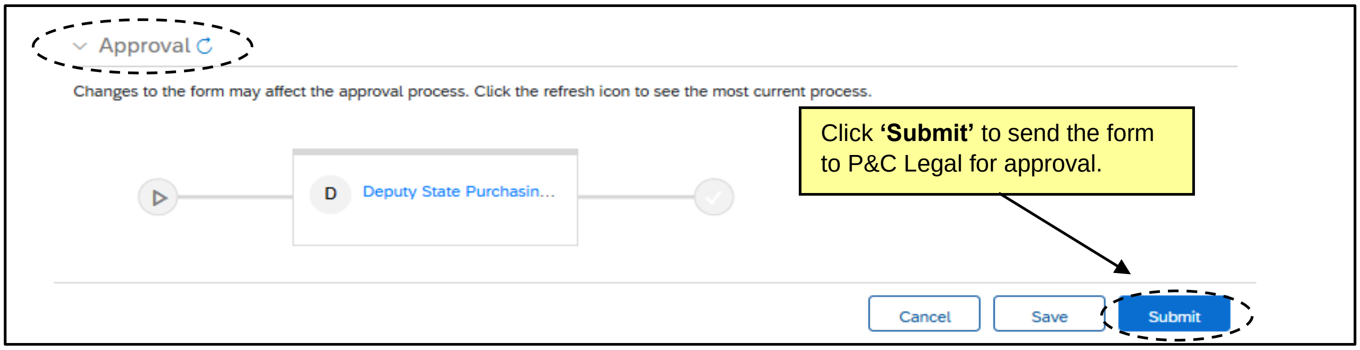


4. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be routed to the **'Deputy State Purchasing Officer - Legal'** approval group.

5. Click **'Submit'** to send the eForm to P&C Legal.

Notes:

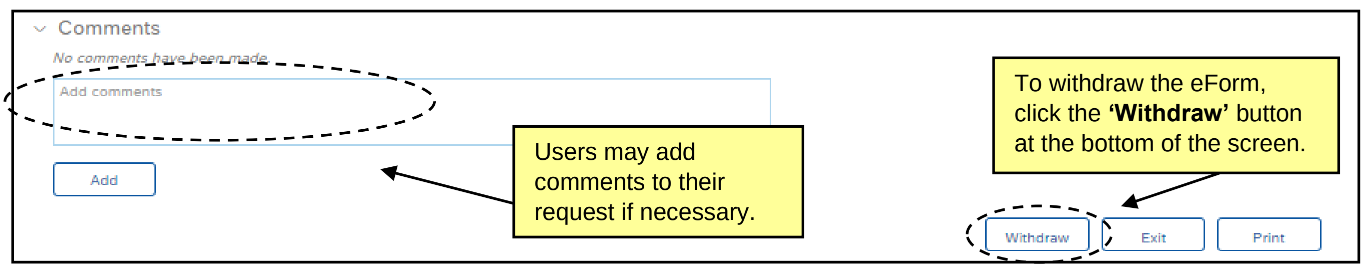
- If any required fields are incomplete, the system will indicate them by highlighting them in red.
- At any time when creating an **'Initiate Request for Negotiations of T&Cs'** eForm, the user may opt to save the eForm to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



6. 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 **'PRF'**.

7. 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 and either approve or deny the eForm. Notification will be given via email, and the updated status will display in the **'My Documents'** portlet.



VII. Completing the 'Request BAFO Review' Form

Agency users who post solicitations via eVP will use this form to request P&C to approve their BAFO documents.

1. After selecting the **'Procurement Request eForms (Non-Sourcing)'** option, the **'Requester Information'** section will display. Fields with asterisks next to them indicate required fields.

   a. Begin by populating the free-text box **'Title'** field to provide P&C with a description of the request.

   b. Next, complete the four free-text fields indicating the user's contact information.

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

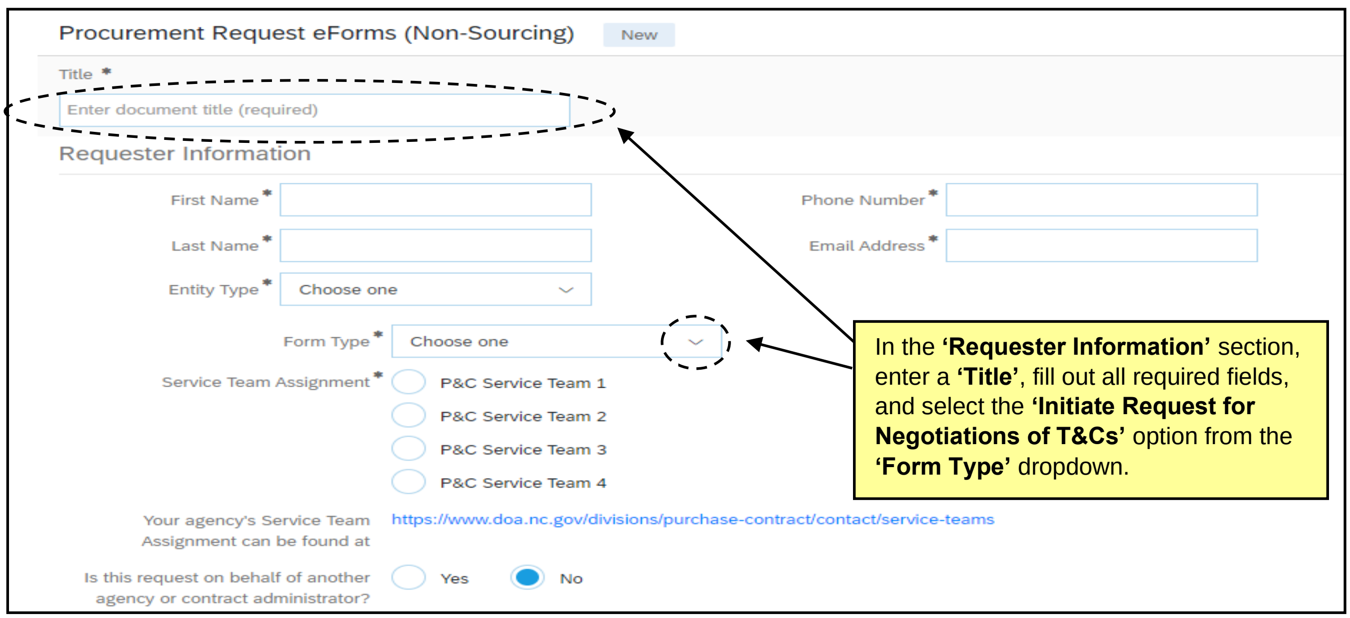
d. After a brief pause, an additional dropdown field will display based on the previous selection. Click the down arrow to reveal the options. Scroll or use the search bar to find and select the user's entity.

e. In the **'Form Type'** field, click the down arrow and select **'Request for BAFO Review**. A new section will display at the bottom of the form.

f. 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.

   Note: 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&C's Service Teams](#) page.

g. The last field asks a **'Yes'** or **'No'** question to indicate if this request is being made on behalf of another agency. If **'No'** is selected, move to the next section. If **'Yes'** is selected, five additional fields will display in which the user can provide information about the other **'Contract Administrator'**.



2. The **'Gain P&C Preliminary Review Approval of BAFO'** section contains four fields and an opportunity to upload supporting documents to form the request.

   a. The first field is a free-text box field asking the user to provide the **'Solicitation Number'**.

   b. The next free-text box field allows the user to enter the **'Solicitation Title and Description'**.

   c. The third field is a free-text box in which the user can indicate in US Dollars the **'Estimated cumulative contract value including renewal options'**. This field must be a number.

d. The next field allows the user to **'Attach the Negotiation Rationale Memo'**. Click **'Upload file'**, select **'Choose file'**, choose a local file, and click **'Done'**. Multiple files may be added.

e. The next field allows the user to **'Attach the original response'**. Click the **'Upload file'** button, select **'Choose file'**, choose a local file, and click **'Done'.** Multiple files may be added.

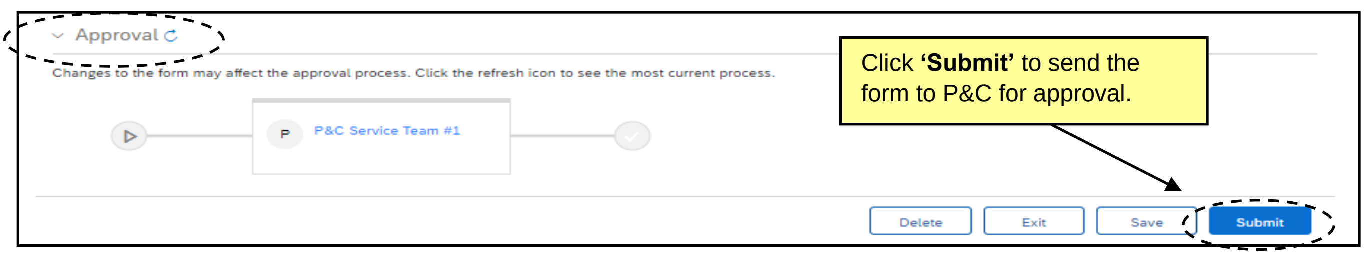
f. In the **'Attach the drafted Request for BAFO'** field, the user should download, complete, and upload the **'Request for BAFO Template'** document located just above the **'Upload file'** button. Click the **'Upload file'** button, select **'Choose file'**, choose a local file, and click **'Done'**.

g. In the final free-text **'Comments'** field, add any comments to help further explain the situation to P&C Legal if necessary.

3. 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 routed to the **'P&C Service Team #X'** selected in the **'Requester Information'** section.

   Note: Additional P&C approver groups will be added to the approval flow when the contract value surpasses established dollar thresholds.
4. Click **'Submit'** to send the eForm to P&C.

   Notes:
   - If any required fields are incomplete, the system will indicate them by highlighting them in red.
   - At any time when creating an **'Request for BAFO Review'** eForm, the user may opt to save the eForm to submit at a later time by clicking the **'Save'** button at the bottom of the screen.



5. 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 **'PRF'**.

6. 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 **'Exit'**.

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