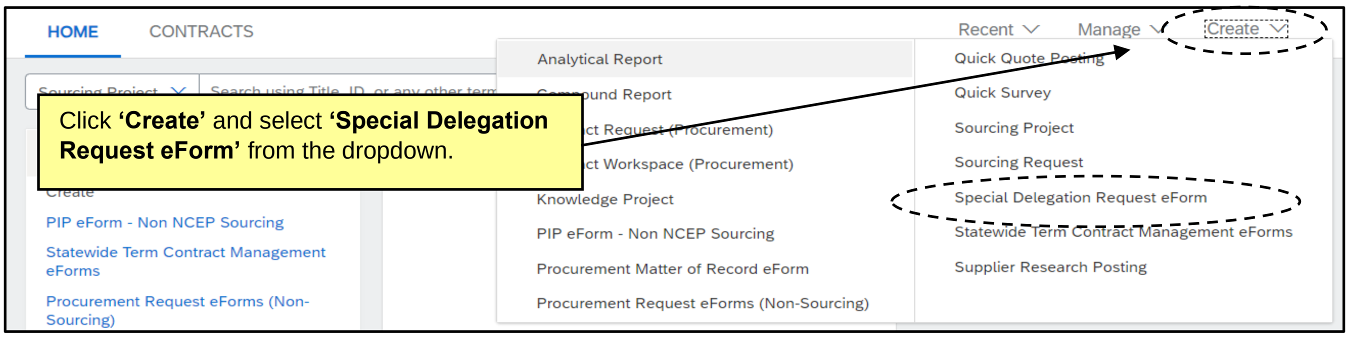
NC eProcurement

Special Delegation Request eForm

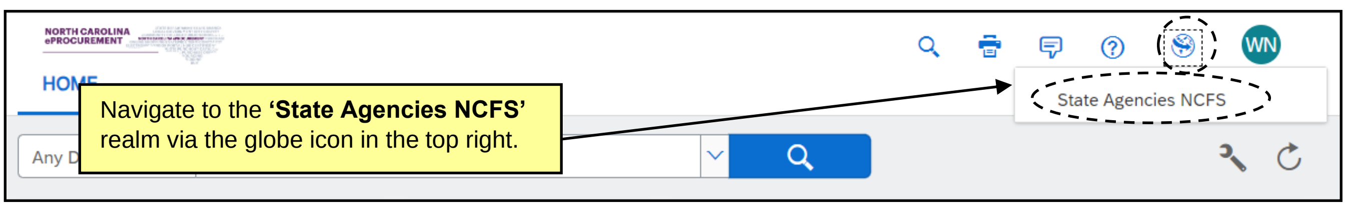
The **'Special Delegation Request eForm'** is used to submit a request for special delegation to P&C. This eForm is only available in Expert View of the State Agencies NCFS realm of NC eProcurement (NCEP). To access these eForms as a non-NCFS NC eProcurement purchaser, users must be added to the **'Procurement 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.

I. Initiating the eForm

1. To access the eForm, select **'Special Delegation Request eForm'** from the **'Create'** menu. The **'Special Delegation Request eForm'** page is displayed.



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 'Special Delegation Request eForm'

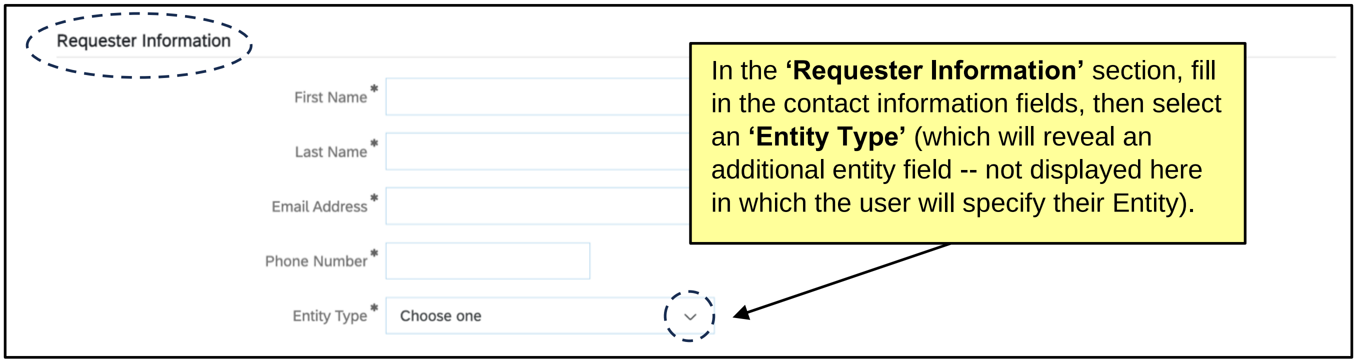
Users will complete seven sections in the **'Special Delegation Request eForm'.**

1. After selecting the **'Special Delegation Request 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.



2. The **'Special Delegation Request Details'** section contains five required fields.

    a. The first field is a free-text box that allows the user to **'Describe the project'.**

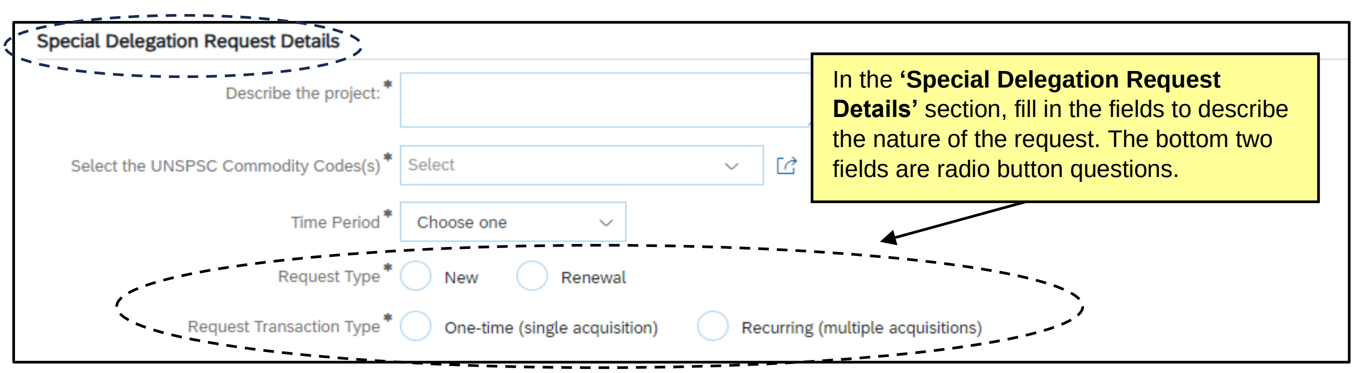
    b. In the **'Select the corresponding UNSPSC Commodity Code'** field, click the down arrow to search for and select the commodity code of the item(s) purchased from that STC. Commodity codes can be searched for by name or numerical ID.

    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. In the **'Time Period'** field, click the down arrow to select the period for the Special Delegation being requested. The user will have the option to select **'Current Fiscal Year'** or **'Current Calendar Year'** from the dropdown. Otherwise, a specific date range may be entered if **'Enter Date Range'** is selected. Date pickers will appear to enter the start and end date ranges.

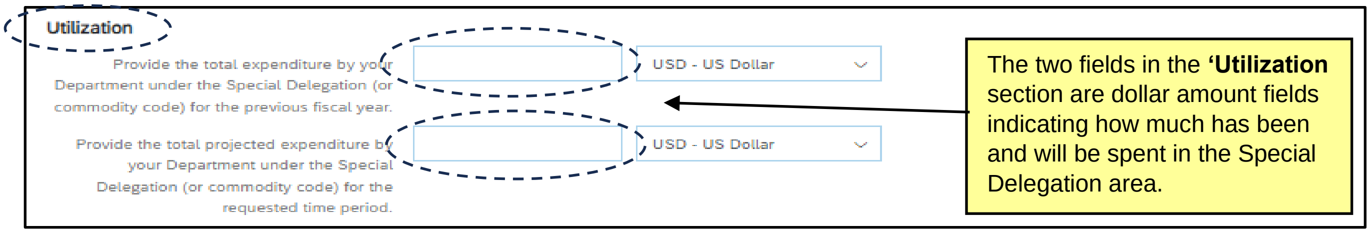
    d. In the **'Request Type'** field, the user must indicate whether the request is **'New'** or a **'Renewal.**

    e. Indicate whether the request is for a **'One-time (single acquisition)'** transaction or a '**Recurring (multiple acquisitions)'** transaction in the **'Request Transaction Type'** field.



3. The **'Utilization'** section has two required fields.

   a. The two free-text box fields in this section ask user to indicate in US Dollars how much their Department spent on this Special Delegation in the previous fiscal year and how much they expect to spend during the requested delegation period. This field must be a number.

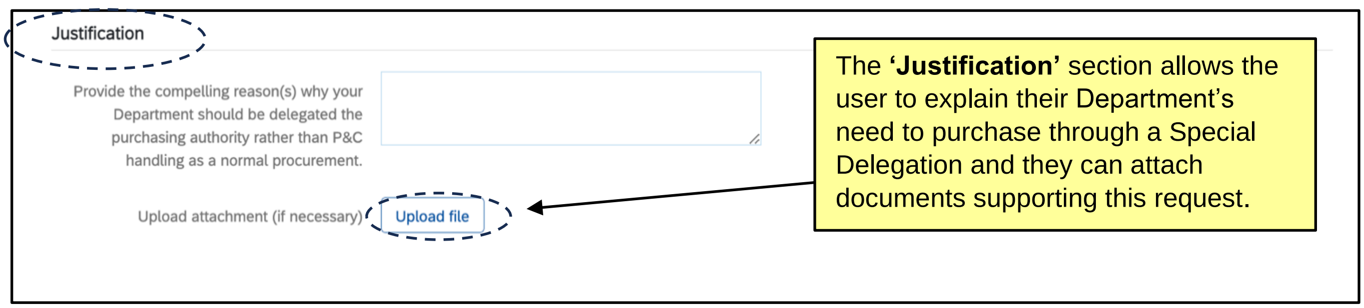


4. The **'Justification'** section contains one free-text field and an option to upload supporting documents.

   a. The first required field is a free-text box that allows the user to provide a reason the Special Delegation is needed.

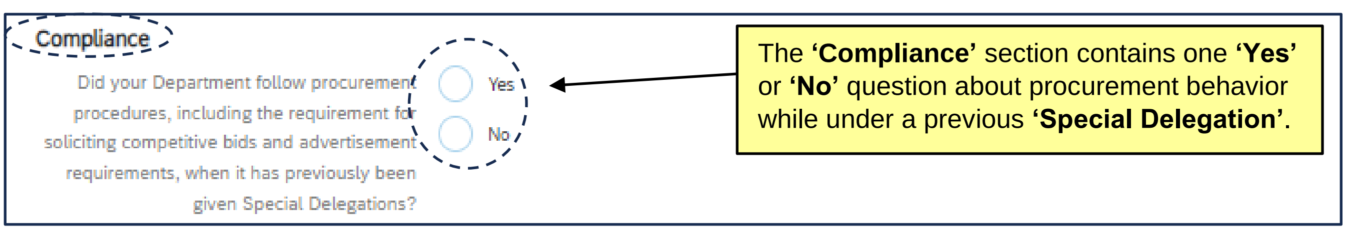
   b. Users may provide any relevant supporting documents for P&C via an attachment. Click the **'Upload file'** button, click **'Choose file'**, select a local file, and click **'Done'**. Multiple files may be added if necessary.

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



5. The **'Compliance'** section contains one required **'Yes'** or **'No'** question.

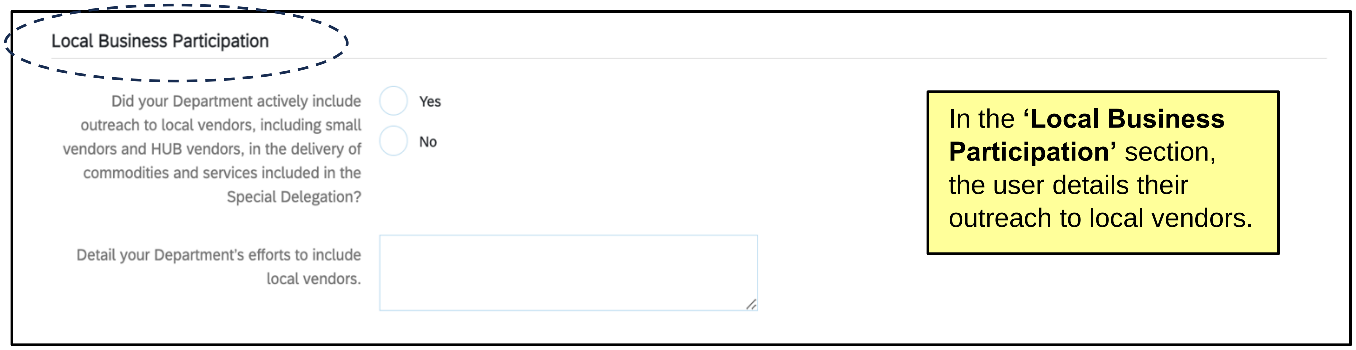
   a. This field asks a **'Yes'** or **'No'** question about the user's department following procurement procedures when previously granted Special Delegations.



6. The next section is the **'Local Business Participation'** section with two required fields in it.

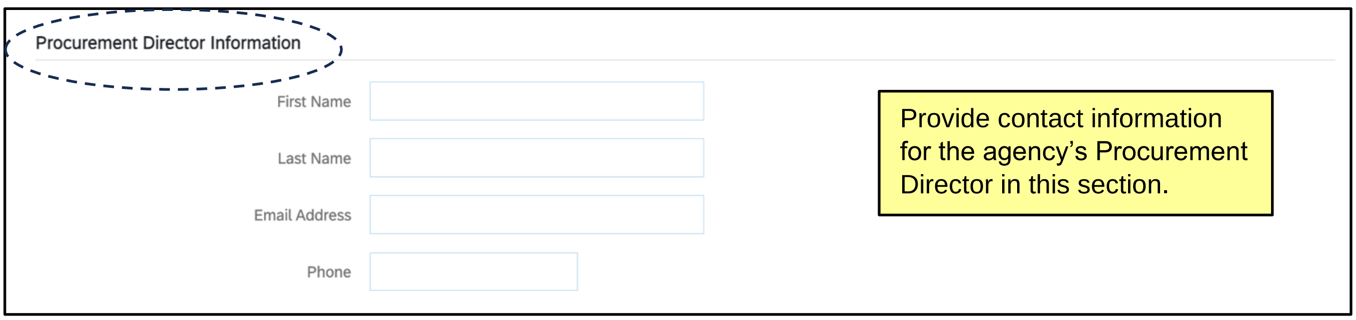
   a. The first field asks a **'Yes'** or **'No'** question regarding whether outreach was made to local vendors for the delivery of the commodities or services included in the Special Delegation.

b. The last field is a free-text box where the user can describe their efforts to include local vendors.



7. The final section is the **'Procurement Director Information'** section, which contains four free-text fields.

a. Complete the four free-text fields indicating the Procurement Director's contact information.

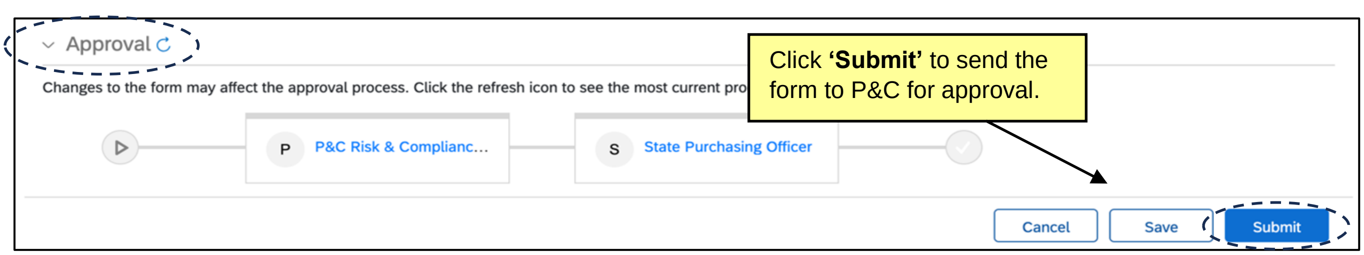


8. Once all required fields have been populated, the approval flow can be displayed by clicking the arrow to the left of **'Approval'** at the bottom of the screen. The approval flow will show that the eForm will be sent to the **'P&C Risk & Compliance Management'** and **'State Purchasing Officer'** approver groups.

9. 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 **'Special Delegation Request'** eForm, the user may opt to save the eForm to submit later by clicking the **'Save'** button at the bottom of the screen.



10. 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 **'SDR'**.

11. 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.