

# Statewide Term Contract Management eForms

## Introduction

The **Statewide Term Contract Management eForms** are used to submit two documents to P&C: the **STC Performance Evaluation** form and an **STC Exception Request**. These eForms are 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.



## Learning Objectives

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



Initiate an eForm.



Complete the STC Performance Evaluation eForm.

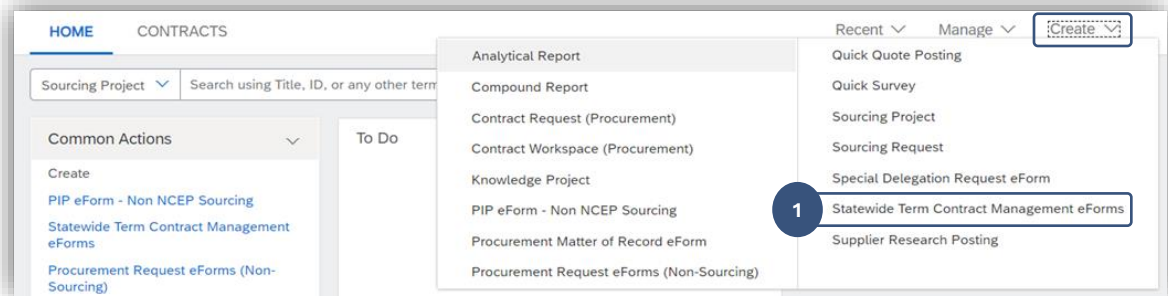


Complete the STC Exception Request eForm.

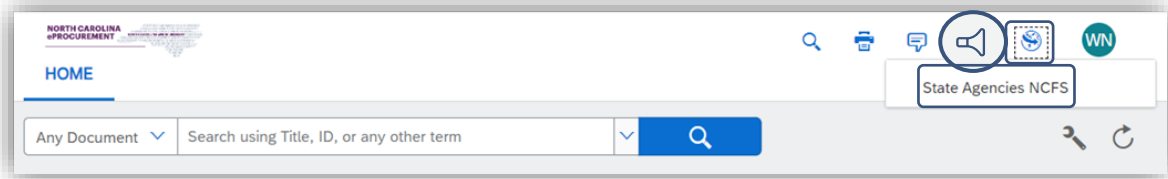
# Statewide Term Contract Management eForms

## Initiating the eForm

- 1 To access the eForms, select **Statewide Term Contract Management eForms** from the **Create** menu in NCFS Expert View. This brings up the **Statewide Term Contract Management eForms** 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 STC Performance Evaluation Form

- 2 The Statewide Term Contract (STC) Performance Evaluation form serves as a tool to confirm the effectiveness and accountability of procurement processes. The primary purpose of this form is to facilitate the structured assessment of vendor performance under Statewide Term Contracts. The form plays a crucial role in fostering transparency, accountability, and improvement in the state's procurement operations. It empowers stakeholders to assess vendor performance, address issues, and contribute to the overall enhancement of our procurement processes. Participation in using this form is instrumental in achieving these goals and maintaining the integrity of the state's procurement practices.

After selecting the **Statewide Term Contract Management eForms** 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.

# Statewide Term Contract Management eForms

D. In the **Form Type** field, click the down arrow and select **STC Performance Evaluation**. Three new sections will display below additional descriptive text:

- **Vendor and Contract Details**
- **Performance Evaluation**
- **Vendor Interaction**

Statewide Term Contract Management eForms

New

Requester Information

First Name \*

Last Name \*

Email Address \*

Phone Number \*

Entity Type \* Choose one

Form Type \* Choose one

Cancel Save Submit

The next section is the **Vendor and Contract Details** section which contains three dropdown fields:

- E. In the **Vendor Name** field, click the down arrow to search for and select the STC vendor being evaluated. Vendors can be searched for by name or eVP Customer Number.
- F. In the **Statewide Contract ID** field, click the down arrow to search for and select the STC being evaluated. STCs can be searched for by name or numerical Contract ID.
- G. 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.

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.

Vendor and Contract Details

Vendor Name \* Select

Statewide Contract ID \* Select

Select the corresponding UNSPSC Commodity Code \*

# Statewide Term Contract Management eForms

The next section is the **Performance Evaluation** section which contains five categories. This section allows users to rate the vendors performance using a scale of 1 (poor) to 5 (excellent) by clicking the radio button to the left of the given score for each category.

H. The five categories are as follows:

- **Quality of goods/services**
- **Customer Service**
- **Timeliness**
- **STC Compliance**
- **Overall Rating**

**Performance Evaluation**

Please rate the vendor's performance in the following areas, using a scale of 1 to 5 (1 being poor and 5 being excellent).

Quality of goods/services \*  1  2  3  4  5

Customer Service \*  1  2  3  4  5

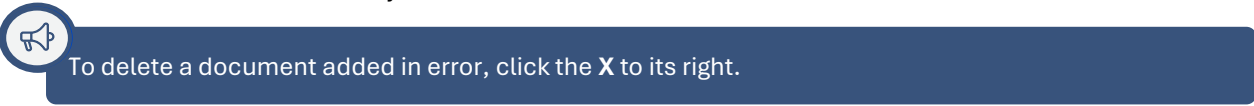
Timeliness \*  1  2  3  4  5

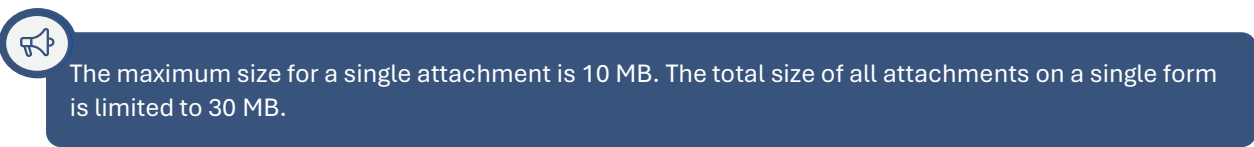
STC Compliance \*  1  2  3  4  5

Overall Rating \*  1  2  3  4  5

The final section is the **Vendor Interaction** section which contains two fields and an option to upload supporting documents. This section allows users to provide additional information about their interactions with the vendor:

- The first field asks a **Yes** or **No** question about any concerns the user may have with their interactions with the vendor. If **No** is selected, move to the next field. If **Yes** is selected, two additional fields will display after a brief pause.
  - If the user answered **Yes**, the first additional field will provide a free-text box allowing for further explanation and then they'll be able to indicate whether they contacted the vendor about their concerns.
- Whether **Yes** or **No** was selected in the first field, the next field will be a free-text box allowing the user to provide any **Additional Comments**.
- Users can 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.

 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.

**Vendor Interaction**

Do you have any concerns about your interaction with the vendor? \*  Yes  No


Additional Comments


Attach any supporting documents or other relevant information

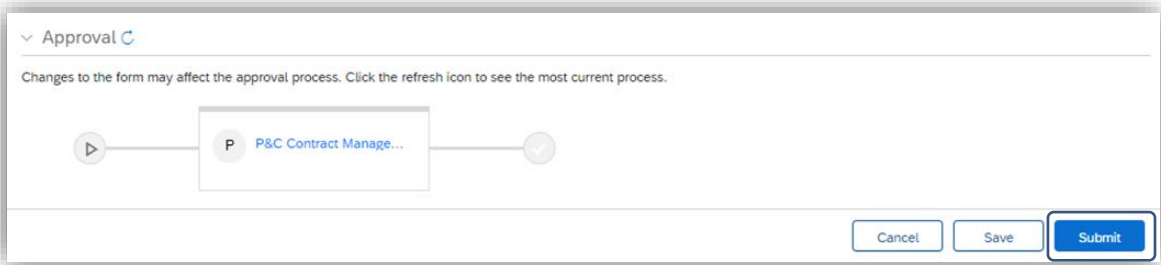
# Statewide Term Contract Management eForms

L. 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 Contract Manager** group for review and approval.

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

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

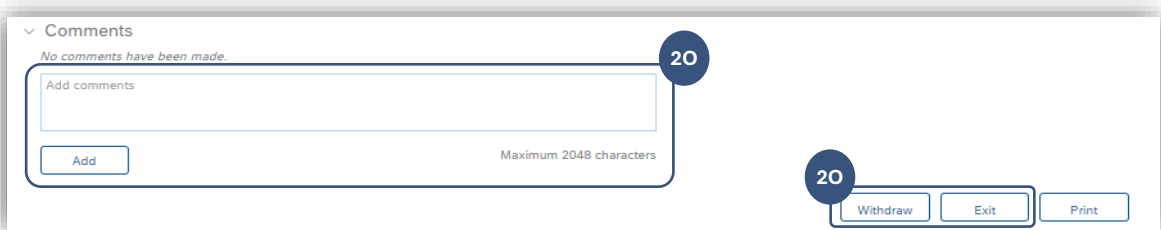
 At any time when creating an **STC Performance Evaluation** eForm, the user may opt to save the eForm to submit later by clicking the **Save** button at the bottom of the screen.



N. 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 **STC**.

O. 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.



# Statewide Term Contract Management eForms

## Completing the STC Exception Request Form

3

Statewide Term Contracts (STCs) are established by P&C for state departments and most State Agencies, as well as higher education institutions. These contracts may also be utilized by non-mandatory State Agencies and other eligible entities, such as local municipalities and schools. In situations where a good or service is needed for a particular application and the agency believes that the needed goods or services are not covered under a STC, the Contract Manager who manages the performance of the STC must be consulted for appropriate action. If a waiver, emergency purchase, or pressing need arises, STC vendors should be given the opportunity to satisfy the requirement, if the needed goods or services are covered by an STC and if time permits such action.

After selecting the **Statewide Term Contract Management eForms** 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. In the **Form Type** field, click the down arrow and select **STC Exception Request**. Two new sections will display below additional descriptive text:
  - **Exception Request Details**
  - **Statement of Accountability**

Statewide Term Contract Management eForms

Cancel Save Submit

New

**Requester Information**

First Name \*

Last Name \*

Email Address \*

Phone Number \*

Entity Type \* Choose one

Form Type \* Choose one

Complete the **Exception Request Details** section which contains seven fields and an option to upload supporting documents:

- E. Use the date picker to indicate the date the goods or services are needed.

# Statewide Term Contract Management eForms

**F** In the **Statewide Contract ID** field, click the down arrow to search for and select the STC for which an exception is being requested. STCs can be searched for by name or numerical Contract 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.** The next field asks a **Yes** or **No** question about alternative options. Different additional free-text box fields will display after a brief pause depending on the selection.

**H.** The bottom field in the left column asks a **Yes** or **No** question about vendor communication. If **No** is selected, move to the next field. If **Yes** is selected, two additional free-text box fields and an option to upload supporting documents will display after a brief pause.

**I.** 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.

- i.** If the user answered **Yes**, the first additional field will provide a free-text box allowing for further explanation why the information discussed with the vendor was not suitable and with whom they spoke.
- ii.** Users can provide any quotes or correspondence with the vendor 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.

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.

**J.** In the top field of the right column, users can use a free-text box to provide a **Description of Needed Goods/Services.**

**K.** The next field asks a **Yes** or **No** question about other whether other STCs have been considered. If **No** is selected, move to the next field. If **Yes** is selected, another **Statewide Contract ID** field will display after a brief pause. Search for and select the identified STC as instructed in **Step F.** from this section.

# Statewide Term Contract Management eForms

L. The final free-text box field allows the user to explain the reason for the exception request.

M. Finally, Users can 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.



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.

The screenshot shows the 'Exception Request Details' form. Callouts 3E through 3M point to various fields: 3E (date field), 3F (contract ID dropdown), 3G (Alternative Options radio buttons), 3H (Vendor Communication radio buttons), 3J (Description of Needed Goods/Services text area), 3K (Considered STCs radio buttons), 3L (Reason for Exception text area), and 3M (Upload file button).

The final section is the **Statement of Accountability** section which contains just one field:


N. The user should type their name into the single free-text box to represent a signature indicating the information provided is accurate to the best of their knowledge.


The screenshot shows the 'Statement of Accountability' section. It includes a paragraph of text: "By typing your signature here, you confirm that the information provided in this form is accurate to the best of my knowledge. I understand that an exception from using a Statewide Term Contract may only be granted based on valid justifications and that inconsequential cost differences are not sufficient reasons." Below this is a single text input field with a callout 3N pointing to it.

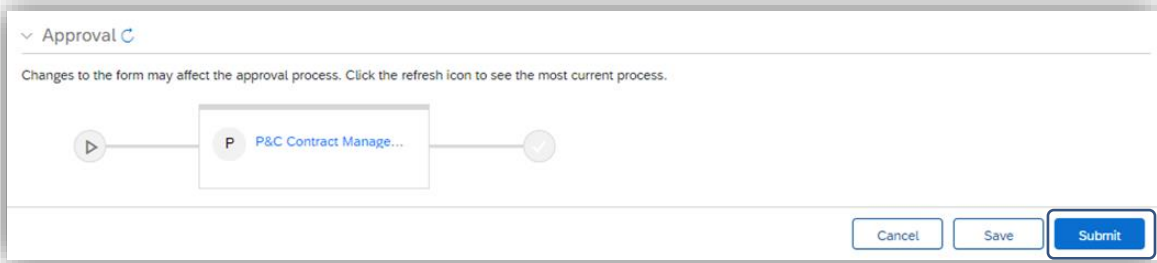
# Statewide Term Contract Management eForms

O. 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 Contract Manager** group for review and approval.

P. 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 an **STC Performance Evaluation** eForm, the user may opt to save the eForm to submit later by clicking the **Save** button at the bottom of the screen.



Q. 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 **STC**.

R. 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.

