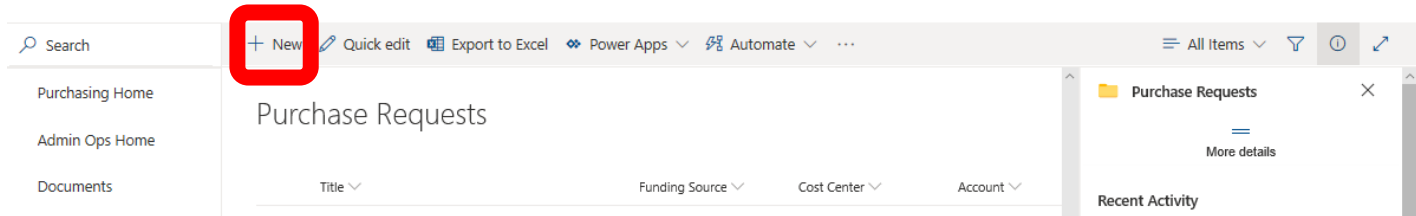


Instructions for Electronic Purchase Requests

- 1.0 All purchase requests must be submitted using SharePoint.
- 2.0 To initiate a purchase request, the employee responsible for creating the order will start a new purchase request by clicking +New.



- 3.0 Fill in the Title for the order, Funding Source, Cost Center, Account, Laboratory, Section, Discipline and Total Amount. The Purchasing Step will default to Pending Manager Approval. Leave this option selected unless you have the authority to approve the order to send to Purchasing. All mandatory items are marked with a red asterisk. The purchase request will not save if the required information is not present. **A separate purchase order will be required for each discipline and for contract versus noncontract items.** Refer to <https://ncadmin.nc.gov/government-agencies/procurement/statewide-term-contracts> to determine which items are on state term contracts and https://justice365.sharepoint.com/:w:/r/sites/LAB/AdminOps/Purchasing/_layouts/15/Doc.aspx?sourcedoc=%7BF7DA1C06-A4A3-40D8-B89E-A0C29F416EF2%7D&file=Agency%20Specific%20Term%20Contracts.docx&action=default&mobileredirect=true for Laboratory specific term contracts.

New item

Title *

Enter value here

You can't leave this blank.

Funding Source *

☒ General - 0901

☐ Grant - 0902

Cost Center *

1410 - Crime Lab Admin

Account *

Select options

Laboratory *

☐ Raleigh

☐ Triad

☐ Western

Section *

Select an option

Discipline *

Select an option

- 4.0 Attach the purchase request form and quote for all orders. For orders greater than or equal to \$5000 also attach the sole source letter, end user memorandum, and Waiver of Competition form. To attach these items, click Add attachments. Select the file from your PC to upload. Repeat for each attachment.

The screenshot shows a web form for creating a purchase request. The form includes several sections: a 'Total Amount' field with the value '5,000'; a 'Purchasing Step' dropdown menu set to 'Pending Manager Approval'; a 'Procurement Specialist' search field with the placeholder 'Enter a name or email address'; a 'Comments' section with a list icon and an edit icon; a 'Packing Slips' dropdown menu set to 'Pending'; an 'Enterprise Keywords' section with a text input field and a description; an 'Attachments' section with a red box around the 'Add attachments' link; an 'Apply label' dropdown menu set to 'None'; and a bottom section with a red box around the 'Save' button and a 'Cancel' button.

\$€ Total Amount *

5,000

✓ Purchasing Step *

Pending Manager Approval

🔍 Procurement Specialist

Enter a name or email address

☰ Comments

✓ Packing Slips

Pending

🔑 Enterprise Keywords

Type term to tag

Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse

📎 Attachments

Add attachments

☰ Apply label

None

Save Cancel

5.0 Select Save.

6.0 Notify the manager/supervisor that the purchase request is ready for review and submission. The manager or supervisor will open and review the purchase request. If the request is complete, accurate and ready for submission, the manager/supervisor will change the Purchasing Step to Submitted to Purchasing and add a comment stating approved.

\$€ Total Amount *

5000

✓ Purchasing Step *

Submitted to Purchasing

🔍 Procurement Specialist

Enter a name or email address

☰ Comments

Approved



- 7.0 The procurement specialist will add his/her name to the Procurement Specialist Column and review the purchase request. If the request needs additional information, the procurement specialist will change to Purchasing Step to Returned and add a Comment to the purchase request indicating what needs to be amended/corrected. To add a comment, select the pencil beside the Comments box.

✓ Purchasing Step *

Returned


🔍 Procurement Specialist

Enter a name or email address

☰ Comments

Suggs, Timothy (6/18/2020 12:29 PM):

Approved



- 8.0 The procurement specialist will then notify the manager/supervisor that additional information is needed for the purchase request.
- 9.0 The manager/supervisor will make the needed changes. Once complete, the manager/supervisor will change the Purchasing Step to Submitted to Purchasing.

✓ Purchasing Step *

Submitted to Purchasing

🔍 Procurement Specialist

Clay, Sara

- 10.0 Once the purchase request is complete, the procurement specialist will change the Purchasing Step to Pending Lab Admin.

✓ Purchasing Step *

Pending Lab Admin

🔍 Procurement Specialist

Clay, Sara

- 11.0 Lab Admin will review the purchase request and either send the request to DOJ or deny. If the request is denied, the Purchasing Step will be marked Closed and a comment will be added denoting that request was denied. If Lab Admin approves the request, the Purchasing Step will be changed to Pending DOJ. For IT purchases over \$25,000, there is an additional step for State DIT to review and approve the order prior to issuing the purchase order. For non-IT purchase requests over \$25,000, there is an additional step for State P&C to review and approve the order prior to issuing the purchase order.

✓ Purchasing Step *

Pending DOJ

🔍 Procurement Specialist

Clay, Sara

- 12.0 Once DOJ/DIT/P&C approval has been obtained, the purchasing specialist will attach the purchase order to the purchase request, and change the Purchasing Step to Approved/PO Issued.

✓ Purchasing Step *

Approved/PO Issued

🔍 Procurement Specialist

Clay, Sara

- 13.0 When the order is received and reconciled according to the Procedure for Procurement and Receipt, the packing slips will be scanned and attached to the purchase request. Prior to upload of a packing slip, be sure to place a check mark by each item received and add a signature and date.
- 13.1 Title each document in the following manner: Packing Slip, PO (EP) #, and vendor name. Example: Packing Slip EP1234567 Krackeler.
- 13.2 Add a number to any packing slip beyond the first. Example: Packing Slip 2 EP1234567 Krackeler.
- 13.3 If there is not a packing slip included with the order, print the PO (EP) document attached to the purchase request and notate what was received. Also be sure to sign and date the document. Upload to SharePoint using standard title format for packing slips.
- 13.4 Change status to "Packing Slip Submitted." This serves as a flag to let Procurement know an order has been received. If the status is not updated and remains in a pending status, Procurement will not be alerted that a packing slip has been uploaded. This can lead to invoice payment delays. Please ensure this status change is made and saved each time.
- 13.5 If receiving multiple shipments for one order, upload the packing slip(s) each time you receive one and change the status each time to "Packing Slip Submitted."
- 13.6 Only send to NCSCLOrders@ncdoj.gov in cases where there is not a SharePoint PR. Example: orders from old system with NC#, gas deliveries, etc.
- 13.7 If there are any issues with an item (examples include: damaged items, quantity received does not match shipped quantity, incorrect items, etc.) please notify Procurement immediately via NCSCLOrders@ncdoj.gov.

☑ Packing Slips

Packing Slip Submitted

Once the procurement specialist has processed the packing slip(s) in EProcurement, the procurement specialist will change the status to Packing Slip Processed.

Issued by: Chris Parker

✓ Packing Slips

Packing Slip Processed

- 14.0 When the invoice is received from the vendor, the invoice will be attached to the purchase request. The Purchasing Step will be changed to Invoice Received.

✓ Purchasing Step *

Invoice Received

🔍 Procurement Specialist

Clay, Sara

- 15.0 The procurement specialist will compare the purchase order, packing slips, and invoice. Once all items have been reconciled the Purchasing Step will be changed to Closed. If there is a difference in the amount of the purchase between the invoice and amount recorded in the purchase request, the amount in the purchase request will be updated to reflect the amount paid.

✓ Purchasing Step *

Closed

🔍 Procurement Specialist

Clay, Sara

- 16.0 All records for purchases will be maintained in the Purchase Request folder. Each section/laboratory is not required to maintain a duplicate copy.