

DHHS Create Orders on Behalf of Others SSP (Self-Service Procurement)

INV

QUICK REFERENCE GUIDE INV-39

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide step-by-step guidance of how to Create Orders on Behalf of Others SSP (Self-Service Procurement), Review Consumption Requisitions, and Submit for Approval in the North Carolina Financial System (**NCFS**).

This Job Aid is to be used in conjunction with Web-Based Training (WBT) **INV100-Inventory Request** and **INV107-Consumption Requisition Approvals** as well as **INV-12 QRG** found here: <u>https://www.ncosc.gov/training/NCFS-help-documents/inv-12-create-orders-behalf-others-self-service-procurement</u>.

Introduction and Overview

This QRG covers the creation of SSP orders on behalf others at the Department of Health and Human Services (DHHS). Requestors can enter Consumption Requisitions to order goods for their locations as well as on the behalf of other locations. Requestors can review consumption requisitions and submit for approval.

Initiate Consumption Requisition

To Initiate Consumption Requisition in NCFS, please follow the steps below:

- 1. Navigate to the NCFS environment with this link: <u>https://osc.nc.gov/ncfslogin.</u>
- 2. Log in to the NCFS portal with your credentials to access the system.
- 3. On the Home page, under the Procurement tab, click the Purchase Requisitions app.





4. Select Update Requisition Preferences from the More Tasks drop-down.

Requisitions ⑦)					4 More 1		s Ì∰ 0
Shop by Categor		View More	Recent Purchases		९	R	iter Requisition Line equest Noncatalog Item equest New Supplier odate Preparer and Requester odate Requisition Preferences	JEREMY ROBERTS 🖍
30R0000052 30R0000051	BATTERY, ALKALINE, 9 VOLT APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/C		O	O	O			
30R0000050 30R0000049 30R0000048	APPLESAUCE, UNSWEETENED, #10 CAN BLEACH BLEACH	Approved Approved Approved Approved	BATTERY, ALKALINE, 9 VOLT	BLEACH	APPLESAUCE, UNSWEETENED, 6/10/CS			
			EACH	US gallon	CASE			

- 5. On the Edit Requisition Preferences page.
- 6. Enter the Requisitioning BU (Business Unit).
- 7. The **Requester** should default to your name.
- 8. Enter the **Deliver-to Location**.
- 9. Destination Type defaults to Expense.
- 10. Click **Save and Close** Button.

Edit Requisition Preferences 5									
Select the requisitioning BU where your preferences will be applicable.									
Requisitioning BU 3000 DHHS MENTAL HEALTH 76									
Shipping and Delivery									
* Requester ROBERTS, JEREMY Q									
* Deliver-to Location JIRV14-J. IVERSON RIDDLE DEV. CE Q									
Destination Type Expense v 9									
⊿ Billing									
Favorite Charge Accounts	+								
Primary * Nickname * Charge Account	Delete								
No data to display.	10 Save and Close								

11. Select Enter Requisition Line from the More Tasks drop-down choice list.

Re	equisitions @)					More Tasks 🔻	Manage Requisition	is [™] 0
:	Shop by Categor	y ~	Search			ৎ	Enter Requisit Request Nonc Request New	atalog Item Supplier	JEREMY ROBERTS 🖋
	Recent Requisiti	ions	Vi	iew More	Recent Purchases			rer and Requester sition Preferences	View More
ß	30R000052	BATTERY, ALKALINE, 9 VOLT	🥥 Appr	roved					
	30R0000051	APPLESAUCE, CUP, MANGO, NS/	A, 72/4 OZ/CS	roved					
	30R0000050	APPLESAUCE, UNSWEETENED,	#10 CAN 🔮 Appr	roved	SCRATCH PAD, (DOC), 5"				
	30R0000049	BLEACH	🕑 Appr	roved	X 8", 100 SH/PD, 10 PAD/PK				
	30R0000048	BLEACH	Appr	roved	Internally Orderable PACKAGE				
					1 ₩				

- 12. The Enter Requisition Line Screen Appears.
- 13. Line Type defaults to Goods.



14. Enter **Item Number** for ordering and the name of the item will display.

Enter Requisition Line 12				Add to Cart	Done	₩ 0
13 Line Type	Goods 🗸	Source Type	Supplier			
14 Item	3000006	Agreement	٩			
Revision	3000006 APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG		New supplier			
* Item Description	More	Supplier	٩			
	ß	Supplier Site	v			
* Category Name	Q,	Supplier Contact	~			
* Quantity	1	Phone				
* UOM Name	-	Fax				
* Price		Email				
* Currency	USD	Supplier Item				
	Negotiated					
J Delivery						
* Requester	ROBERTS, JEREMY Q	* Deliver-to Location	JIRV14-J. IVERSON RIDDLE DEV. CE $ \mathbf{Q}_i $			
Urgent	No 🗸	Deliver-to Address	300 ENOLA RD, LABORATORY, MORGAN	ITONNC, 286550000, BURKE, US		
Requested Delivery Date	10/11/23					
Suggested Buyer	Q,					

- 15. The Item Description will populate.
- 16. The Category Name will populate.
- 17. Enter the **Quantity** desired.
- 18. The UOM Name will default.
- 19. The **Price** will default.
- 20. The Currency will default to "USD".
- 21. The **Source Type** will default to **"Inventory"** & a warning message will appear "<u>Select the</u> <u>right Source Organization</u>". (This is a visual for the user to double check the Source Organization selected).
- 22. Select the appropriate **Source Organization** by clicking the **Select Source** link if different than default.

Enter Requisition Line ⑦	Select the	a right Source Organization 21	Add to Cart Done 🦙 0
* Line Type	Goods 👻	Source Type Inventory ~	
Item	3000006 Q	22 Source Organization JIRDC MAIN WA	REHOUSE Select Source
15 Revision Item Description	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Source Subinventory	•
* Quantity 18 UOM Name	BAG 56 09623 19		
A Delivery			
* Requester	ROBERTS, JEREMY Q	* Deliver-to Location JIRV14-J. IVERS	ON RIDDLE DEV. CE Q
Requested Delivery Date	10/11/23	Deliver-to Address P300 ENOLA RD,	LABORATORY, MORGANTONNC, 286550000, BURKE, US

- 23. In the Delivery section, update the Requestor Name.
- 24. Update the **Deliver-to Location** if needed.
- 25. Enter the **Requested Delivery Date** if different than default date.





26. In the **Billing** section, enter the **Charge Account** or use the **Search** lcon to search the **Charge Account** needed **(See below example).** Click **OK.**

Note: For the Charge Account, please make sure to only use Business Unit, DHHS = 3000. Enter a valid Budget Fund, select a "5" series account number and the appropriate AMU for your facility. <u>DO NOT ENTER ZEROS FOR AMU</u>

Charge Acco	unt		×
🔺 Hide Seg	ments		
	Agency	3000 🔻	DHHS MENTAL HEALTH
26	Budget Fund	104177	DHHSMENHLTH 156H CENTRAL REG MAINTENANCE BC 14460
	Account	53240000	CARPENTRY & HARDWARE SUPP
	Agency Mgmt Unit	3001070	▼ WAREHOUSE INVENTORY
	Agency Program	000000	DEFAULT AGENCY PROGRAM
	Funding Source	0000 🔻	UNDESIGNATED
	Project	000000000	 DEFAULT PROJECT
	Inter Fund	000000	 DEFAULT Inter Fund NC CASH
	Future 1	0000 🔻	DEFAULT Future 1
	Future 2	000000	DEFAULT Future 2
	Future 3	00000 -	DEFAULT Future 3
		Sea <u>r</u> ch R	leset OK Cancel

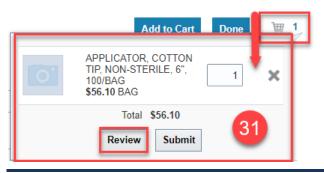
- 27. Enter the Budget Date.
- 28. Enter the Percentage (should always be 100%).
- 29. The **Quantity** and **Amount fields** will default.

delling Vew ▼ Format ▼ 💥 <⊄ 🥅 Freeze 🙀 Detach of Wrap	27	28	29	9		
Charge Account 26	* Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
3000-104177-53240000-3001070-001	10/4/23	100	1	56.10	Not reserved	
	Total	100	1	56.10		

30. Click the Add to Cart Button.



31. Click the Cart Icon and Click Review button.





- 32. Verify the details on the **Edit Requisition** page.
- 33. Enter a **Justification** if needed.
- 34. To Edit the Requisition Line, Click on Actions and then Edit.
- 35. Update the Quantity and Source Organization if needed, Click OK.

Edit Requisition: 30R0000073				s	hop Check Funds I	Manage Approvals View PDF	Save 🔻 Submit
Requisitioning BU 3000 DHIS MENTAL HEALTH * Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100BAG	33 Justification		fi.		1	Approval Amount 56.10 USE Approval Amount 56.10 USE Funds Status Not reserve	
Requisition Lines Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.						Attachments None 🕂	
Duplicate		Category Name	* Quantity	UOM Name	* Price	Amount (USD) Funds Stat	us Delete
Edit 34 OTTON TIP, NON-STERILE, 6", 100/BAG		421415-Applicator sw	1	BAG	56.09623 USD	56.10 Not reserved	×
Delete View Punchout Cart						56.10	
Edit Line: 1 Line Type Goods Item 3000006 Revision Item APPLICATOR, COTTON TIP, NON-STERILE, 6°, Description 100/BAG Category Name 421415-Applicator swabs and cotton balls Category Name BAG Price 56.09623 Currency USD	35 * Source Organization JIRDC M Source Subinventory	AIN WAREHOUSE Selec	t Source				

36. Update the **Delivery** and **Billing** information if needed.

Line 1: Details	
4 Delivery	
* Requester ROBERTS, JEREMY Q	* Deliver-to Location JIRV14-J. IVERSON RIDDLE DEV. CE Q
Requested Delivery Date 10/11/23	Deliver-to Address P300 ENOLA RD, LABORATORY, MORGANTONNC, 286550000, BURKE, US
4 Billing 37	
View 💌 Format 💌 🗶 💭 Freeze 🔛 Detach 📣 Wrap	
Charge Account	* Budget Date * Percentage Quantity Amount (USD) Funds Status Delete
3000-104177-53240000-3001070-0000	10/4/23 🛍 100 1 56.10 Not reserved
	Total 100 1 56.10

37. Click the **Save** drop-down choice list and select the **Save and Close button**.

Edit Requisition: 30R0000073 ⑦			Shop	Check Funds	Manage Approvals	View PDF	Save 🔻	Sub <u>m</u> it
						37	<u>S</u> ave a	ind Close
Requisitioning BU 3000 DHHS MENTAL HEALTH	Justification				Requisition Amount	56.10 USD		
* Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG		ĥ			Approval Amount	56.10 USD		
6					Funds Status	Not reserved		
					Attachments	None 🕂		



38. A **Confirmation** pop-up appears. Click the **Ok** button.



39. You are redirected to the **Requisitions dashboard**.

					More Tasks 🔻	Manage Requisitions	`₩ 0
Search				९		Requester JERE	MY ROBERTS 🖌
	View More	Recent Purchases					View More
	Incomplete	Ĩ.	6	6	20		
	 Approved Approved 	BATTERY, ALKALINE, 9	BLEACH	APPLESAUCE,	39		
	 Approved Approved 	VOLT	Internally Orderable 🖲	UNSWEETENED, 6/10/CS			
		EACH	US gallon	CASE			
	Search TTON TIP NON-STERILE, 6°, 100/BAG UNSWEETENED, 12/46 OZ CANSICASE NE, 9 VOLT JP, MANGO, NSA, 72/4 OZICS NSWEETENED, #10 CAN	View More TTON TIP, NON-STERILE, 6°, 100/BAG Incomplete UNSWEETENED, 12/46 OZ CANSICASE @ Approved NE, 9 VOLT @ Approved IP, MANGO, NSA, 72/4 OZ/CS @ Approved	View More Recent Purchases TTON TIP, NON-STERILE, 6°, 100/BAG Incomplete JNSWEETENED, 1246 OZ CANSICASE © Approved NE, 9 VOLT © Approved JP, MANGO, NSA, 724 OZ/CS © Approved USWEETENED, #10 CAN © Approved	View More Recent Purchases TTON TIP. NON-STERILE, 6', 100/BAG Incomplete JNSWEETENED, 1246 02 CANSICASE 	View More Recent Purchases TTON TIP, NON-STERILE, 6', 100/BAG Incomplete UNSWEETENED, 1246 OZ CANSICASE © Approved INE, 9 VOLT © Approved IP, MANGO, NSA, 72/4 OZICS @ Approved ISWEETENED, #10 CAN © Approved	Starch Q View More Recent Purchases TTON TIP. NON-STERILE, 6', 100BAG Incomplete JNSWEETENED, 1246 0Z CANSICASE Approved IP. MANGO, NSA, 724 0Z/CS Approved Internally Orderable @ Internally Orderable @	Starch Q Requester JERE TTON TIP NON-STERILE, 6', 100/BAG Incomplete Incomplete JNSWEETENED, 1246 02 CANSICASE Approved IP, MANGO, NSA, 724 02/CS Approved Internally Orderable @ Internally Orderable @ Internally Orderable @ Internally Orderable @ EACH US galon CASE CASE Control C

40. On the **Requisitions** dashboard, you can view the **Recent Requisitions**.

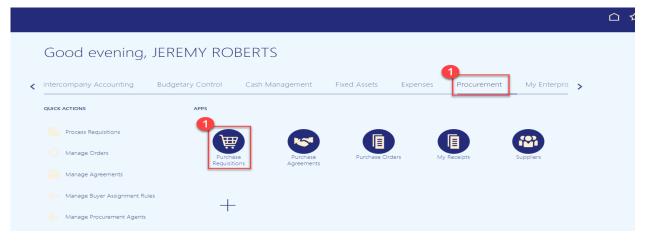
Requisitions (٥					More Tasks 🔻	Manage Requisitions)⊞ 0
Shop by Catego	ry				ৎ		Requester JEREMY	Roberts 🧪
Recent Requisit	Nons	View More	Recent Purchases					View More
30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Incomplete						
52R0000054	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	Approved						
30R0000052	BATTERY, ALKALINE, 9 VOLT	Approved	BATTERY, ALKALINE, 9	BLEACH	APPLESAUCE,			
30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	Approved	VOLT		UNSWEETENED, 6/10/CS			
30R0000050	APPLESAUCE, UNSWEETENED, #10 CAN	Approved	Internally Orderable EACH	Internally Orderable @ US gallon	Internally Orderable CASE			
			1 🐺 💌	1 🐺 💌	1 🐺 💌			



Review and Submit DHHS Consumption Requisitions

To review DHHS consumption requisitions, please follow the steps below:

1. On the Home page, under the Procurement tab, click the Purchase Requisitions app.



- 2. On the Requisitions page, click Manage Requisitions.
- 3. Under **Recent Requisitions** you can select recently entered requisitions to manage also.

Requisitions	2					More Tasks 🔻 💋	Manage Requisitions	₩ 0
Shop by Catego	ry √ Search				९		Requester JEREMY ROP	BERTS 🖋
Recent Requisit	tions 3	View More	Recent Purchases				V	fiew More
30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6*, 100/BAG	Incomplete						
52R0000054	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	Approved						
30R0000052	BATTERY, ALKALINE, 9 VOLT	Approved	BATTERY, ALKALINE, 9	BLEACH	APPLESAUCE,			
30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	Approved	VOLT		UNSWEETENED, 6/10/CS			
30R0000050	APPLESAUCE, UNSWEETENED, #10 CAN	Approved	Internally Orderable EACH	Internally Orderable ()	Internally Orderable CASE			
				US gallon				

- 5. Enter the Requisitioning BU.
- 6. Entered by will default to your name but can be updated.
- 7. In the Search Criteria section, enter details in at least one mandatory field indicated by **
 - a. Requisition
 - b. Supplier
 - c. Item number
- 8. Narrow the search further by entering the following fields:
 - a. Description (example: Orange, Juice, or Unsweetened)
 - b. Created time frame
 - c. Status
 - d. Requestor
 - e. Order
 - f. **Requisitions Requiring Attention** changed to **"YES"** will show requisitions that need approval.



9. Click **Search** button.

Manage Rec	uisitions ⑦							Done
Search				A <u>d</u> vanced	Manage Watchlist	Saved Search Re	quisitions I Entered	i v
			8				** At le	ast one is required
	Requisitioning BU	~ 5		Requester		Q,		
	** Entered By ROBERTS, JEREMY			Supplier		٩		
	** Requisition 7		8	Order		٩		
	Description		7	** Item		٩		
	Created - 8		8 Requisitions Requiring	Attention	~			
	Status All		-		_		9	
							Search	Reset Save

10. Under **Search Results** the list of **Requisitions** will show, Click the **Requisition** number that needs managing.

nage Requisiti	ions (?)										Done
Search							Advance	ed Manage Watchli	st Saved Search	Requisitions I En	ered 🗸
											At least one is required
Requisit	itioning BU 3000	DHHS MENTAL HEALTH					Requester		(2	
** E	Entered By ROBE	ERTS, JEREMY Q					** Supplier		(2	
** P	Requisition						Order		(2	
C	Description						** Item		(2	
	Created	×				Requisitions Re-	quiring Attention	~			
	Status All					riequisidens rie	dama a succession [
Tab Baculta										Searc	h Reset Save
Inch Results tions • View • Forr Requisitioning BU	mat ▼ ■ 『	II Er Freeze E Detach of Wrep Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Searce Order Status	h Reset Save Emergency Purchase Order
ctions • View • Form Requisitioning BU			Entered By	Creation Date 10/4/23	Approval Amount 56.10 USD		Funds Status	Procurement Card	Order		Emergency
ctions • View • Form Requisitioning BU	Requisition	Description				Incomplete		Procurement Card	Order 52014		Emergency
tions View Form Requisitioning BU 3000 DHHS ME	Requisition 30R0000073	Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100/BAG	ROBERTS, JE	10/4/23 6/27/23	56.10 USD	Incomplete Approved	Not reserved	Procurement Card		Order Status	Emergency
Ctions View Form Requisitioning 3000 DHHS ME 3000 DHHS ME	Requisition 30R0000073 30R0000052	Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100/BAG BATTERY, ALKALINE, 9 VOLT	ROBERTS, JE	10/4/23 6/27/23 6/27/23	56.10 USD	Incomplete Approved Approved	Not reserved Reserved	Procurement Card	52014	Order Status Closed	Emergency
ctions • View • Forr Requisitioning 0 3000 DHHS ME	Requisition 30R0000073 30R0000052 30R0000051 30R0000050	Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100BAG BATTERY, ALKALINE, 9 VOLT APPLESAUCE, CUP, MANGO, NSA, 724 OZICS	ROBERTS, JE ROBERTS, JE ROBERTS, JE	10/4/23 6/27/23 6/27/23 6/27/23	56.10 USD 1.96 USD 26.83 USD 2	Incomplete Approved Approved Approved	Not reserved Reserved Reserved	Procurement Card	52014 52012	Order Status Closed Closed	Emergency
ctions • View • Forr Requisitioning 0 3000 DHHS ME	Requisition 30R0000073 30R0000051 30R0000051 30R0000050 30R0000050	Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 1008AG BATTERY, ALKALINE, 9 VOLT APPLESAUCE, CUP, MANGO, NSA, 724 OZ/CS APPLESAUCE, UNSWEETENED, #10 CAN	ROBERTS, JE ROBERTS, JE ROBERTS, JE ROBERTS, JE	10/4/23 6/27/23 6/27/23 6/27/23 6/27/23	56.10 USD / 1.96 USD / 26.83 USD / 7.03 USD /	Incomplete Approved Approved Approved Approved	Not reserved Reserved Reserved Reserved	Procurement Card	52014 52012 52011	Order Status Closed Closed Closed	Emergency
ctions • View • Forr Requisitioning 3000 DHHS ME 3000 DHHS ME	Requisition 30R0000073 30R0000051 30R0000051 30R0000050 30R0000050	Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100BAG BATTERY, ALKALINE, 9 VOLT APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS APPLESAUCE, LUNSWEETENED, #10 CAN BLEACH	ROBERTS, JE ROBERTS, JE ROBERTS, JE ROBERTS, JE ROBERTS, JE	10/4/23 6/27/23 6/27/23 6/27/23 6/27/23 6/27/23	56.10 USD / 1.96 USD / 26.83 USD / 7.03 USD / 6.38 USD /	Incomplete Approved Approved Approved Approved Approved	Not reserved Reserved Reserved Reserved Reserved	Procurement Gard	52014 52012 52011 52009	Order Status Closed Closed Closed Closed	Emergency
ctions • View • Forr Requisitioning 3000 DHHS ME 3000 DHHS ME	Requisition 30R0000073 30R0000052 30R0000051 30R0000050 30R0000050 30R0000050 30R0000048	Description APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100BAG BATTERY, ALKALINE, 9 VOLT APPLESAUCE, CUP, MANGO, NSA, 724 OZ/CS APPLESAUCE, UNSWEETENED, #10 CAN BUEACH BLEACH	ROBERTS, JE ROBERTS, JE ROBERTS, JE ROBERTS, JE ROBERTS, JE ROBERTS, JE	10/4/23 6/27/23 6/27/23 6/27/23 6/27/23 6/27/23 6/27/23	56.10 USD 1 1.96 USD 2 26.83 USD 2 7.03 USD 4 6.38 USD 4 6.74 USD 4	Incomplete Approved Approved Approved Approved Approved Approved	Not reserved Reserved Reserved Reserved Reserved Reserved	Procurement Card	52014 52012 52011 52009 53004	Order Status Closed Closed Closed Closed Closed	Emergency

11. On the **Requisition** page, Click the **Actions** drop-down choice list and select **Edit.**

Requisition: 30R0000073 ⑦						Check Funds	View Life Cycle	Actions *	D <u>o</u> ne
Requisitioning BU 3000 DHHS MENTAL HEALTH Entered By "JEREMY ROBERTS Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Creation Date Status Justification	10/4/23 Incomplete			Requisition Amount Approval Amount Funds Status Attachments M	56.10 USD Not reserved	Duplicate Cancel Requi Delete Edit Reassign View Docume View PDF	1	
Actions v View v Format v Errezze Detach of Wrap		Category Name	Quantity UOM	Price	Amount (USD) Status	Funds Sta	tus Order	Line Li	ife Cycle
1 P300006 APPLICATOR, COTTON TIP, NON-STERILE, 6°, 100/BAG Rows Selected 1 Columns Hidden 13		421415-Applicator swabs		56.09623 USD	56.10 Incomplete				о (



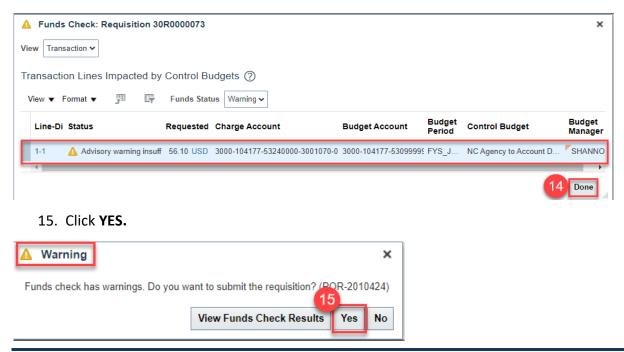
12. On the Edit Requisition page, review the Requisition details and Click the Submit button.

Edit Requisition: 30R0000073 Ø	Shop Check Funds Manage Approvals. View PDF Save * Sub
Requisitioning BU 3000 DHHS MENTAL HEALTH Justification	Reguisition Amount 56:10 USD
* Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Approval Amount 56.10 USD
	Funds Status Not reserved
	Attachments None
Requisition Lines	
Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.	
Actions 🔻 View 🔻 Format 👻 📋 🎢 💥 💮 Freeze 🔐 Detach 🚽 Wrap	
Line Description	Category Name * Quantity UOM Name * Price Amount (USD) Funds Status Delete
1 APPLICATOR, COTTON TIP, NON-STERILE, 6*, 100/BAG	421415-Applicator sw 1 BAG 56.09623 USD 56.10 Not reserved
Total	56.10
Rows Selected 1 Columns Hidden 8	
al Line 1: Details	
A Delivery	
* Requester ROBERTS, JEREMY Q	* Deliver-to Location JIRV14-J. IVERSON RIDDLE DEV. CE Q
	Deliver-to Eddation Site 14-3, IVERSON RIDDLE DEV. CE Va Deliver-to Address P300 ENOLA RD, LABORATORY, MORGANTONNC, 286550000, BURKE, US
Requested Delivery Date 10/11/23	DENTER O ANNESS - SHO EROENTED, ENDIORTONI, MOROMETONIO, 20030000, DONAL, O
A Billing	
View 🔻 Format 💌 💥 < 🎆 Freeze 🔛 Detach 🚽 Wrap	
Charge Account	* Budget Date * Percentage Quantity Amount (USD) Funds Status Delete
3000-104177-53240000-3001070-0000	10/4/23 📸 100 1 56.10 Not reserved 💥
	Total 100 1 56.10
▲ Source	
Source Organization JIRDC MAIN WAREHOUSE	Source Subinventory

13. If you receive the **Funds Check Warning**, Click **"View Funds Check Results"** to view the warning status.



14. View the advisory warning, then Click **Done** to return to the **Funds Check Warning**.



NORTH CAROLINA OFFICE OF THE STATE CONTROLLER



16. The **Confirmation** pop-up appears, which states that the Requisition was submitted. Click the **OK** button.



17. On the **Manage Requisitions** page, click the **Done** button. You are redirected to the **Requisitions** dashboard.

Manage Requisitions 📎									Doue 12
✓ Search					Advance	d Manage Watchlist	Saved Search	Requisitions I Enter	ed 🗸
								** At	least one is required
Requisitioning BU	3000 DHHS MENTAL HEALTH	*			Requester		Q		
** Entered By	ROBERTS, JEREMY Q				** Supplier		٩]	
** Requisition					Order		٩]	
Description					** Item		Q]	
Created	~			Requisitions Re	quiring Attention	~			
Status	All 🗸								
								Search	Reset Save
Search Results									
Actions 🕶 View 💌 Format 💌	🎢 🖙 🔟 Freeze 🔛 Detach 🚽 Wrap								
Requisitioning BU Requisition	n Description	Entered By	Creation Date	Approval Amount Status	Funds Status	Procurement O	rder	Order Status	Emergency Purchase Order
3000 DHHS ME 30R000007	3 APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	ROBERTS, JE	10/4/23	56.10 USD Pending approval	Not reserved				
3000 DHHS ME 30R000005	2 BATTERY, ALKALINE, 9 VOLT	ROBERTS, JE	6/27/23	1.96 USD Approved	Reserved	5	2014	Closed	
3000 DHHS ME 30R000005	1 APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	ROBERTS, JE	6/27/23	26.83 USD Approved	Reserved	5	2012	Closed	
3000 DHHS ME 30R000005	0 APPLESAUCE, UNSWEETENED, #10 CAN	ROBERTS, JE	6/27/23	7.03 USD Approved	Reserved	5	2011	Closed	
3000 DHHS ME 30R000004	9 BLEACH	ROBERTS, JE	6/27/23	6.38 USD Approved	Reserved	5	2009	Closed	
3000 DHHS ME 30R000004	8 BLEACH	ROBERTS, JE	. 6/27/23	6.74 USD Approved	Reserved	5	3004	Closed	

- 18. On the Requisitions page, you can view the **Recent Requisitions**.
- 19. Status should now show "Approved".

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			٩,		Requester JEREMY R	oberts 🌶
View More	Recent Purchases					View More
Approved	Ō	0	Ō	Ō		
 Approved Approved 	APPLICATOR, COTTON TIP, NON-STERILE, 6*, 100/BAG	BATTERY, ALKALINE, 9 VOLT	BLEACH	APPLESAUCE, UNSWEETENED, 6/10/CS		
Approved	Internally Orderable @ BAG	Internally Orderable @ EACH	Internally Orderable 🖲 US gallon	Internally Orderable CASE		
	19 Approved Approved Approved Approved	Approved Approved Approved Approved Approved Approved Approved Approved Internally Orderable •	Approved Internally Orderable © Internally Orderable ©	View More Approved Approved Approved Approved Approved Approved Approved Approved Approved Hermany Ordenable @ Internaty Orden	Vew More Recent Purchases 0 Approved 0 Internally Orderable @ 10 Internally Orderable @ BAG Internally Orderable @	View More Recent Purchases 19 Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved BATERY ALKALINE 9 BLEACH APPLEAUCE: UNSINCETENED, offices Internally Orderable @ Internally Orderable @ Internally Orderable @ Internally Orderable @



Wrap-Up

This QRG covers the creation of SSP orders on behalf others at the Department of Health and Human Services (DHHS) in NCFS.

Additional Resources

- INV 100: Inventory Request (WBT)
- INV 107: Consumption Requisition Approvals (WBT)
- INV-12: <u>https://www.ncosc.gov/training/NCFS-help-documents/inv-12-create-orders-behalf-others-self-service-procurement</u> (QRG)

