



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:

<https://www.ncosc.gov/training/NCFS-help-documents/inv-12-create-orders-behalf-others-self-service-procurement>.

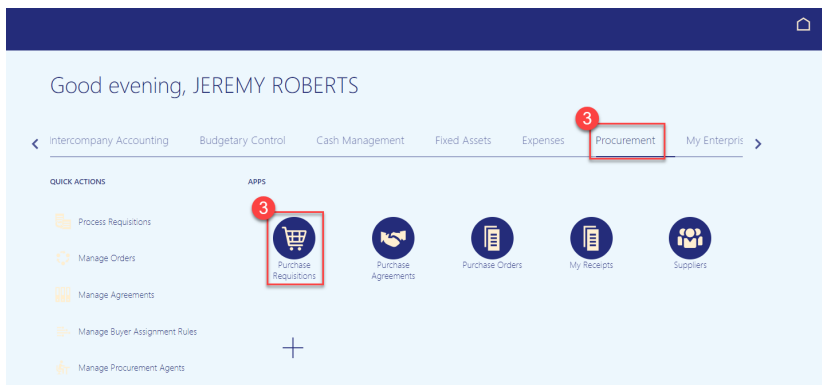
Introduction and Overview

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.

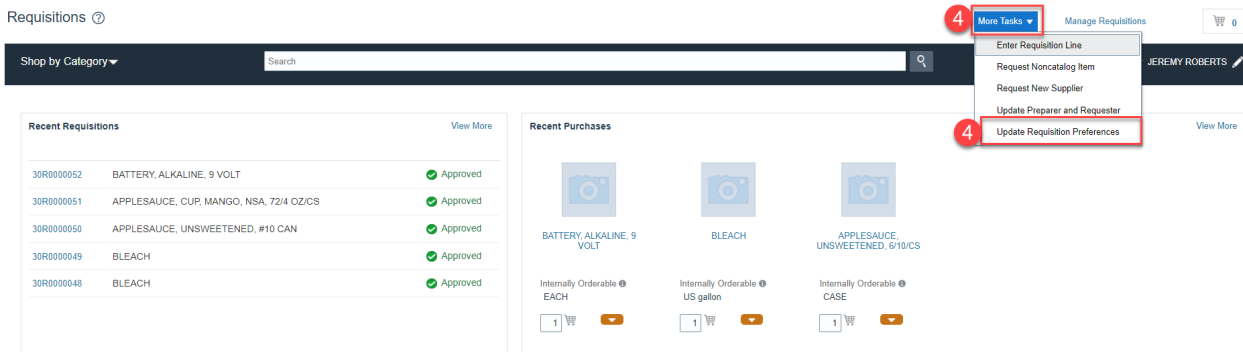
Initiate Consumption Requisition

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

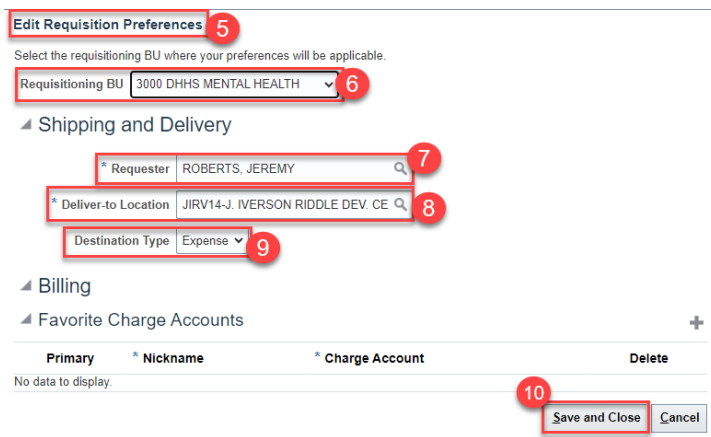
1. Navigate to the NCFS environment with this link: <https://osc.nc.gov/ncfslogin>.
2. Log in to the NCFS portal with your credentials to access the system.
3. On the **Home** page, under the **Procurement** tab, click the **Purchase Requisitions** app.



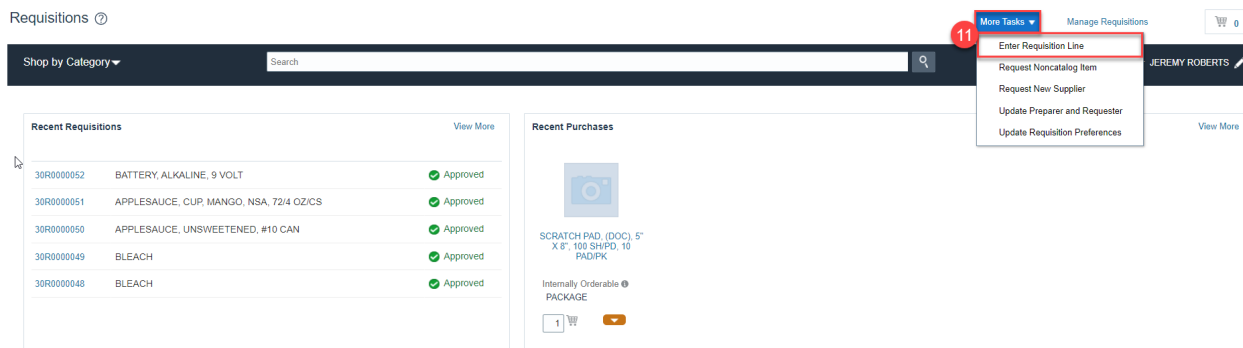
4. Select **Update Requisition Preferences** from the **More Tasks** drop-down.



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.



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



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.

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 “**Select the right Source Organization**”. (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.

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 Icon** 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. DO NOT ENTER ZEROS FOR AMU*****

Charge Account

Hide Segments

Agency: 3000 | DHHS MENTAL HEALTH

Budget Fund: 104177 | DHHSMENTHLTH 156H CENTRAL REG MAINTENANCE BC 14460

Account: 53240000 | CARPENTRY & HARDWARE SUPP

Agency Mgmt Unit: 3001070 | WAREHOUSE INVENTORY

Agency Program: 0000000 | DEFAULT AGENCY PROGRAM

Funding Source: 0000 | UNDESIGNATED

Project: 0000000000 | DEFAULT PROJECT

Inter Fund: 000000 | DEFAULT Inter Fund NC CASH

Future 1: 0000 | DEFAULT Future 1

Future 2: 000000 | DEFAULT Future 2

Future 3: 000000 | DEFAULT Future 3

Buttons: Search, Reset, OK, Cancel

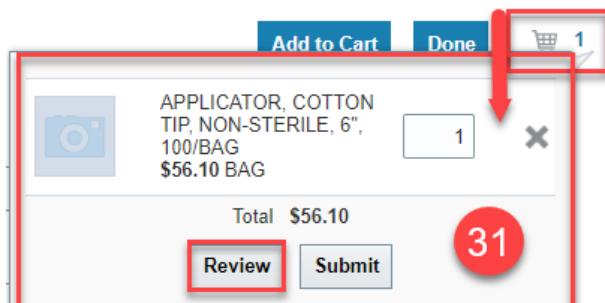
- 27. Enter the **Budget Date**.
- 28. Enter the **Percentage (should always be 100%)**.
- 29. The **Quantity** and **Amount** fields will default.

Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
10/4/23	100	1	56.10	Not reserved	X
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 32

Requisitioning BU 3000 DHHS MENTAL HEALTH

* Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG

Justification 33

Requisition Amount 56.10 USD
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

Actions	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
<div style="border: 1px solid red; padding: 2px;"> Duplicate Edit 34 Delete View Purochast Cart </div>	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	1	BAG	56.09623 USD	56.10	Not reserved	X
56.10							

Edit Line: 1

Line Type Goods

Item 3000006

Revision

Item Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG

Category Name 421415-Applicator swabs and cotton balls

* Quantity 35

UOM Name BAG

Price 56.09623

Currency USD

* Source Organization JIRDC MAIN WAREHOUSE Select Source 35

Source Subinventory

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

Line 1: Details

Delivery

* Requester ROBERTS, JEREMY

Requested Delivery Date 10/11/23

* Deliver-to Location JIRV14-J. IVERSON RIDDLE DEV. CE

Deliver-to Address P300 ENOLA RD, LABORATORY, MORGANTONNC, 286550000, BURKE, US

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
3000-104177-53240000-3001070-0001	10/4/23	100	1	56.10	Not reserved	X
Total				100	1	56.10

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

Edit Requisition: 30R0000073

Requisitioning BU 3000 DHHS MENTAL HEALTH

* Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG

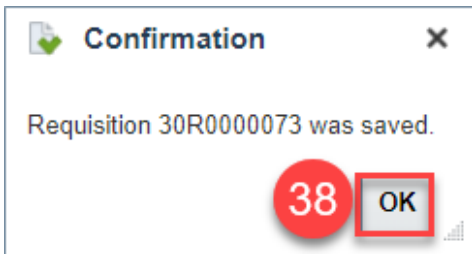
Justification

Requisition Amount 56.10 USD
Approval Amount 56.10 USD
Funds Status Not reserved
Attachments None

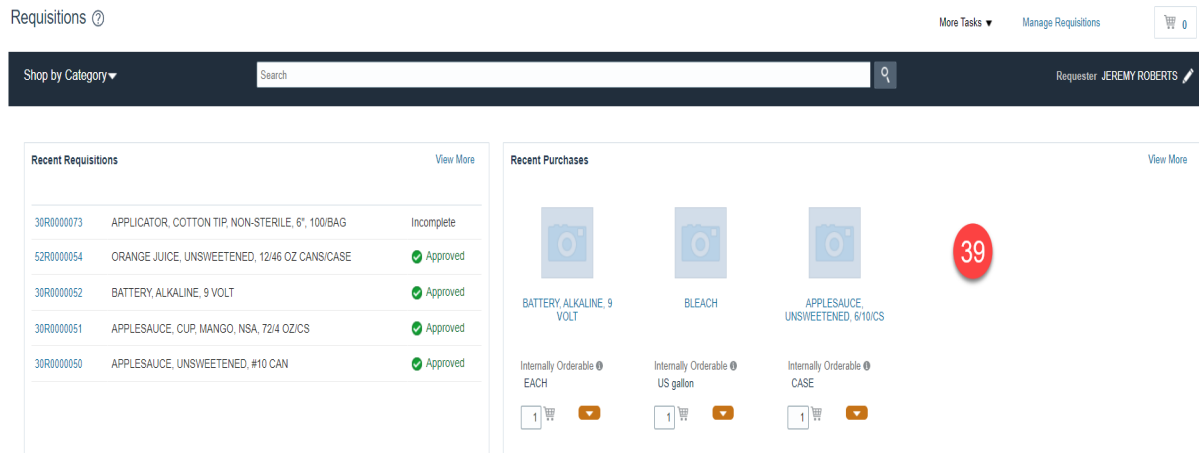
Shop Check Funds Manage Approvals View PDF Save 37 Save and Close Submit



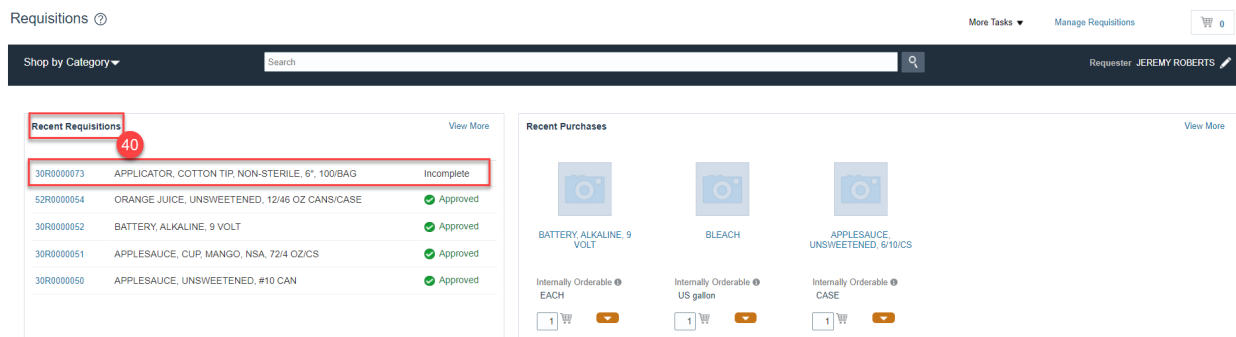
38. A **Confirmation** pop-up appears. Click the **Ok** button.



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



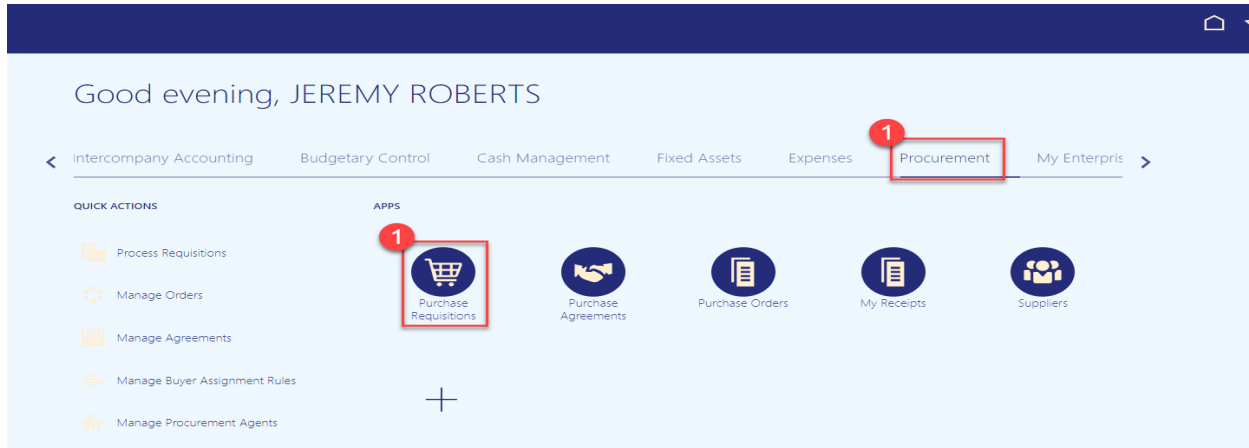
40. On the **Requisitions dashboard**, you can view the **Recent Requisitions**.



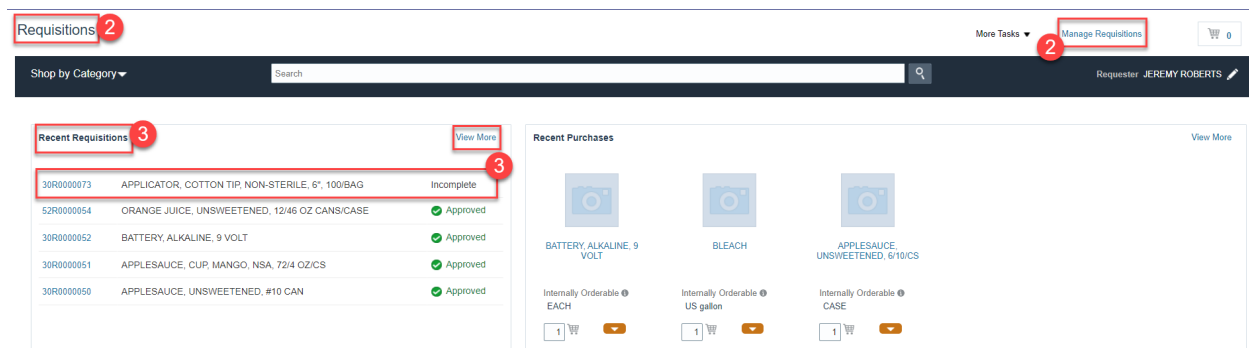
Review and Submit DHHS Consumption Requisitions

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.



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.

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

Search Results

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
3000 DHHS ME...	30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	ROBERTS, JE...	10/4/23	56.10 USD	Incomplete	Not reserved				
3000 DHHS ME...	30R0000052	BATTERY, ALKALINE, 9 VOLT	ROBERTS, JE...	6/27/23	1.96 USD	Approved	Reserved	52014		Closed	
3000 DHHS ME...	30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	ROBERTS, JE...	6/27/23	26.83 USD	Approved	Reserved	52012		Closed	
3000 DHHS ME...	30R0000050	APPLESAUCE, UNSWEETENED, #10 CAN	ROBERTS, JE...	6/27/23	7.03 USD	Approved	Reserved	52011		Closed	
3000 DHHS ME...	30R0000049	BLEACH	ROBERTS, JE...	6/27/23	6.38 USD	Approved	Reserved	52009		Closed	
3000 DHHS ME...	30R0000048	BLEACH	ROBERTS, JE...	6/27/23	6.74 USD	Approved	Reserved	53004		Closed	
3000 DHHS ME...	30R0000046	APPLESAUCE, UNSWEETENED, 6/10/CS	ROBERTS, JE...	6/27/23	42.37 USD	Approved	Reserved	52007		Closed	
3000 DHHS ME...	30R0000045	APPLESAUCE, UNSWEETENED, 6/10/CS	ROBERTS, JE...	6/27/23	44.17 USD	Approved	Reserved	52005		Closed	
3000 DHHS ME...	30R0000043	APPLESAUCE, UNSWEETENED, 6/10/CS	ROBERTS, JE...	6/27/23	36.10 USD	Approved	Not reserved	52004		Closed	

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

Requisition: 30R0000073

Requisitioning BU: 3000 DHHS MENTAL HEALTH
 Entered By: JEREMY ROBERTS
 Description: APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG

Creation Date: 10/4/23
 Status: Incomplete
 Justification:

Requisition Amount: 56.10 USD
 Approval Amount: 56.10 USD
 Funds Status: Not reserved
 Attachments: None

Requisition Lines

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1	3000006	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	421415-Applicator swabs...	1	BAG	56.09623 USD	56.10	Incomplete	Not reserved		



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

Edit Requisition: 30R0000073

Requisitioning BU 3000 DHHS MENTAL HEALTH

* Description APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG

Justification

Requisition Amount 56.10 USD
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	X
Total						56.10		

Rows Selected 1 Columns Hidden 8

Line 1: Details

Delivery

* Requester ROBERTS, JEREMY
Requested Delivery Date 10/11/23

* Deliver-to Location JIRV14-J. IVERSON RIDDLE DEV. CE
Deliver-to Address 300 ENOLA RD, LABORATORY, MORGANTONNC, 286550000, BURKE, US

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	X
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.

Warning

Funds check has warnings. Do you want to submit the requisition? (POR-2010424)

13 View Funds Check Results Yes No

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

Funds Check: Requisition 30R0000073

View Transaction

Transaction Lines Impacted by Control Budgets

View Format Funds Status Warning

Line-Di	Status	Requested	Charge Account	Budget Account	Budget Period	Control Budget	Budget Manager
1-1	Advisory warning insuff	56.10 USD	3000-104177-53240000-3001070-0	3000-104177-53099999	FYS_J...	NC Agency to Account D...	SHANNO

14 Done

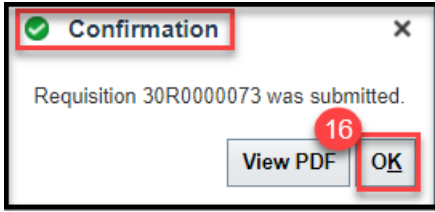
15. Click **YES**.

Warning

Funds check has warnings. Do you want to submit the requisition? (POR-2010424)

15 View Funds Check Results Yes No

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 **Done** 17

Search

Requisitioning BU: 3000 DHHS MENTAL HEALTH

** Entered By: ROBERTS, JEREMY

** Requisition:

Description:

Created:

Status: All

Requester:

** Supplier:

Order:

** Item:

Requisitions Requiring Attention:

Search Reset Save...

Search Results

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
3000 DHHS ME...	30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	ROBERTS, JE...	10/4/23	56.10 USD	Pending approval	Not reserved				
3000 DHHS ME...	30R0000052	BATTERY, ALKALINE, 9 VOLT	ROBERTS, JE...	6/27/23	1.96 USD	Approved	Reserved		52014	Closed	
3000 DHHS ME...	30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	ROBERTS, JE...	6/27/23	26.83 USD	Approved	Reserved		52012	Closed	
3000 DHHS ME...	30R0000050	APPLESAUCE, UNSWEETENED, #10 CAN	ROBERTS, JE...	6/27/23	7.03 USD	Approved	Reserved		52011	Closed	
3000 DHHS ME...	30R0000049	BLEACH	ROBERTS, JE...	6/27/23	6.38 USD	Approved	Reserved		52009	Closed	
3000 DHHS ME...	30R0000048	BLEACH	ROBERTS, JE...	6/27/23	6.74 USD	Approved	Reserved		53004	Closed	

18. On the Requisitions page, you can view the **Recent Requisitions**.

19. Status should now show **"Approved"**.

Requisitions **18**

Shop by Category Search

Requester: JEREMY ROBERTS

Recent Requisitions View More

30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Approved
52R0000054	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	Approved
30R0000052	BATTERY, ALKALINE, 9 VOLT	Approved
30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	Approved
30R0000050	APPLESAUCE, UNSWEETENED, #10 CAN	Approved

Recent Purchases View More

APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG

Internally Orderable

BAG

1

BATTERY, ALKALINE, 9 VOLT

Internally Orderable

EACH

1

BLEACH

Internally Orderable

US gallon

1

APPLESAUCE, UNSWEETENED, 6"/10/CS

Internally Orderable

CASE

1

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: <https://www.ncosc.gov/training/NCFS-help-documents/inv-12-create-orders-behalf-others-self-service-procurement> (QRG)