



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.osc.nc.gov/documents/files/inv-12-create-orders-behalf-others-self-service-procurement>

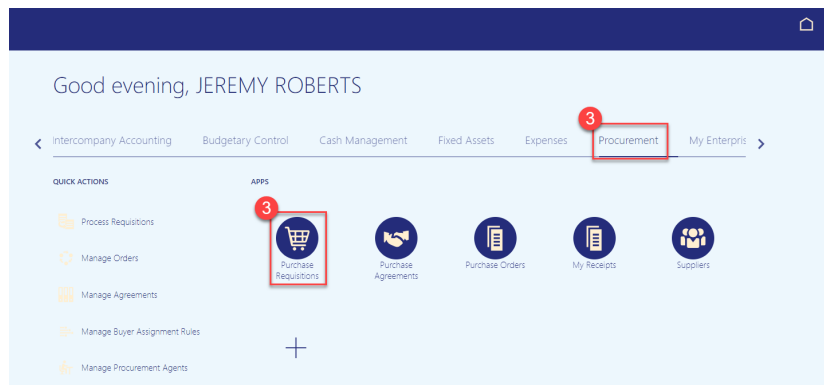
Introduction and Overview

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.

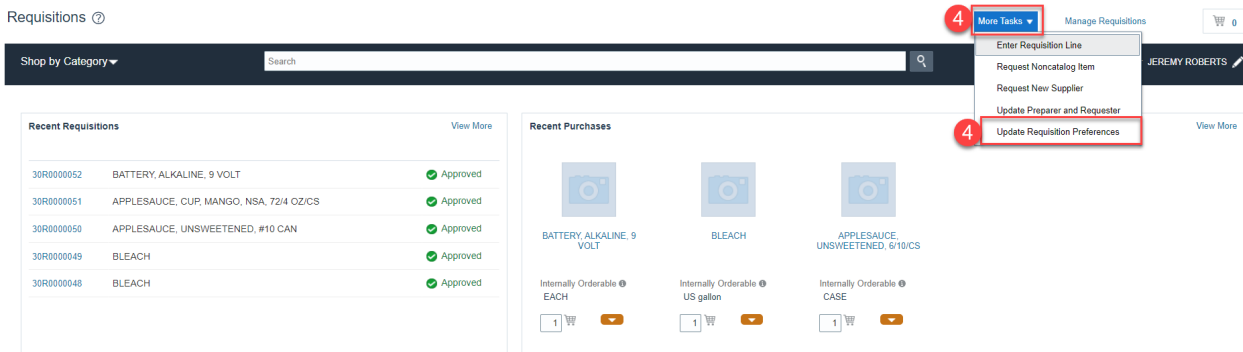
Initiate Consumption Requisition

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

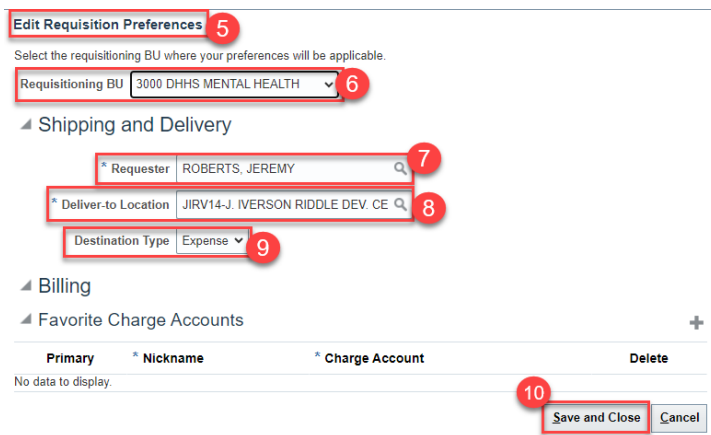
1. Navigate to the NCFS environment with this link: <https://osc.nc.gov/ncfslogin>.
2. Log in to the NCFS portal with your credentials to access the system.
3. On the **Home** page, under the **Procurement** tab, click the **Purchase Requisitions** app.



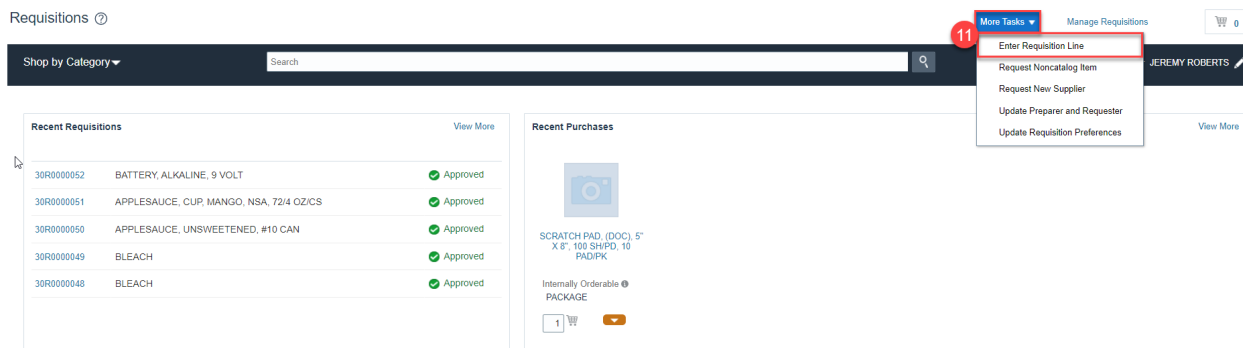
4. Select **Update Requisition Preferences** from the **More Tasks** drop-down.



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”.

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

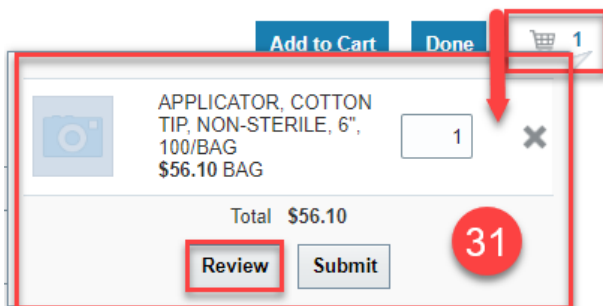
- 27. Enter the **Budget Date**.
- 28. Enter the **Percentage** (should always be 100%).
- 29. The **Quantity** and **Amount** fields will default.

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

Description

Category Name 421415-Applicator swabs and cotton balls

* Quantity 1 35

UOM Name BAG

Price 56.09623

Currency USD

* Source Organization JIRDC MAIN WAREHOUSE Select Source 35

Source Subinventory

OK Cancel 35

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

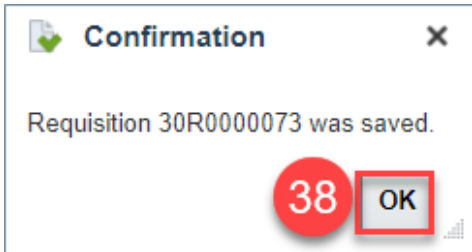
Justification

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

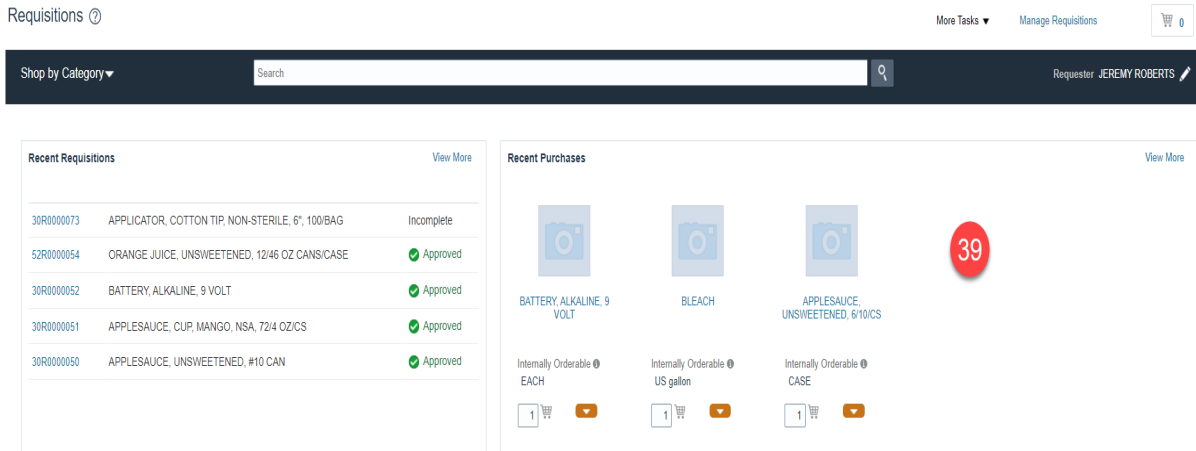
Shop Check Funds Manage Approvals View PDF Save 37 Submit

Save and Close

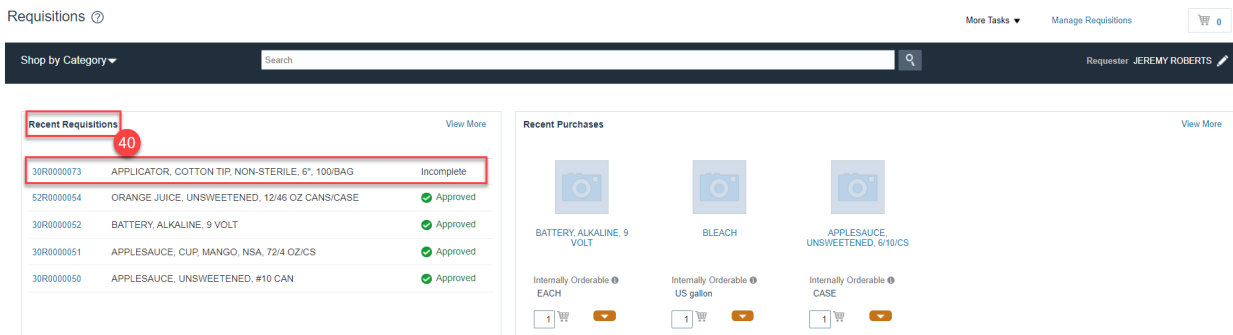
38. A **Confirmation** pop-up appears. Click the **Ok** button.



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



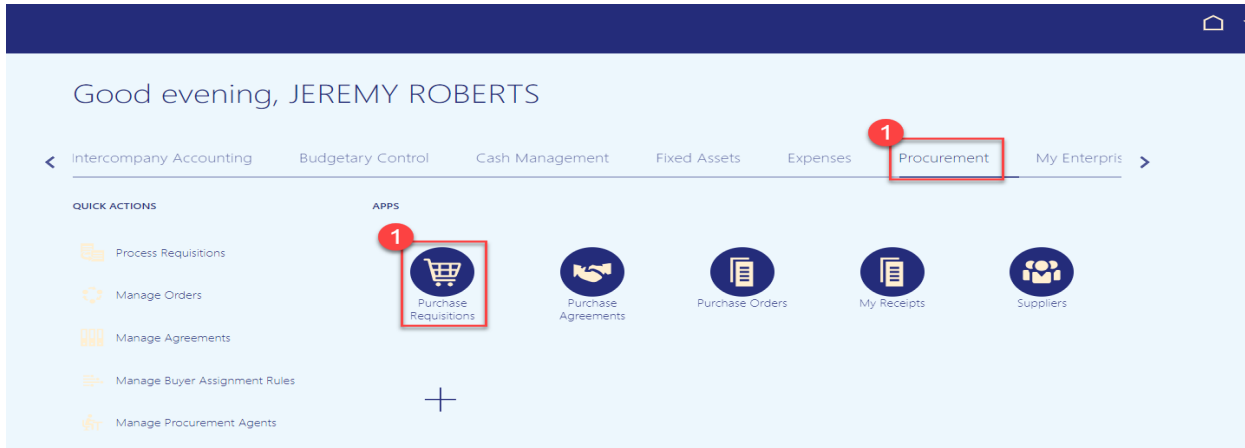
40. On the **Requisitions dashboard**, you can view the **Recent Requisitions**.



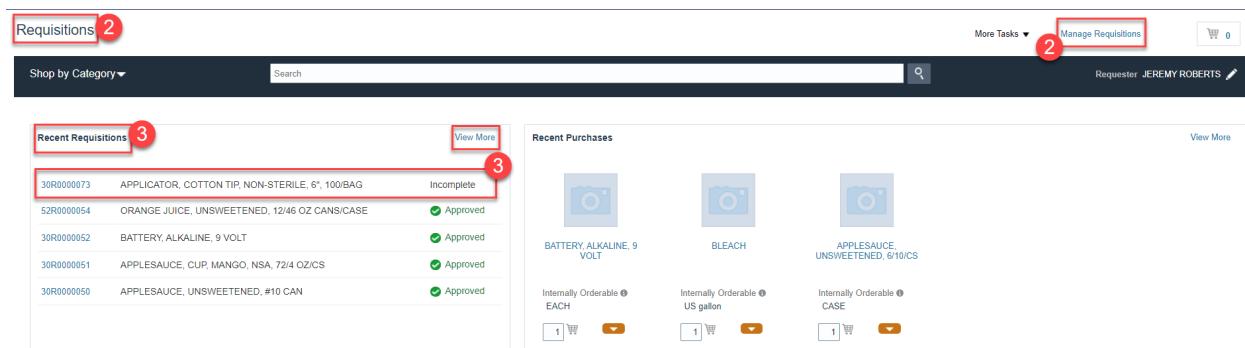
Review and Submit DHHS Consumption Requisitions

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.

The screenshot shows the 'Manage Requisitions' search interface. Red callouts are placed over the following elements: 5 (Requisitioning BU dropdown), 6 (Entered By text input), 7 (Requisition text input), 8 (Description text input), 8 (Created dropdown), 8 (Status dropdown), 8 (Requester text input), 7 (** Supplier text input), 8 (Order text input), 7 (** Item text input), 8 (Requisitions Requiring Attention dropdown), and 9 (Search button).

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

The screenshot shows the search results page. A red callout '10' points to the 'Search Results' section header.

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**.

The screenshot shows the detail page for Requisition 30R0000073. A red callout '11' points to the 'Edit' option in the 'Actions' dropdown menu.

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

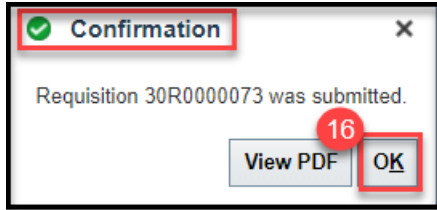
15. Click **YES**.

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

Search

Requisitioning BU: 3000 DHHS MENTAL HEALTH

** Entered By: ROBERTS, JEREMY

** Requisition:

Description:

Created:

Status: All

Advanced | **Manage Watchlist** | Saved Search | Requisitions | Entered 17 Done

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

More Tasks Manage Requisitions

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

BATTERY, ALKALINE, 9 VOLT

Internally Orderable

EACH

BLEACH

Internally Orderable

US gallon

APPLESAUCE, UNSWEETENED, 6"/10/CS

Internally Orderable

CASE

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.osc.nc.gov/documents/files/inv-12-create-orders-behalf-others-self-service-procurement> (QRG)