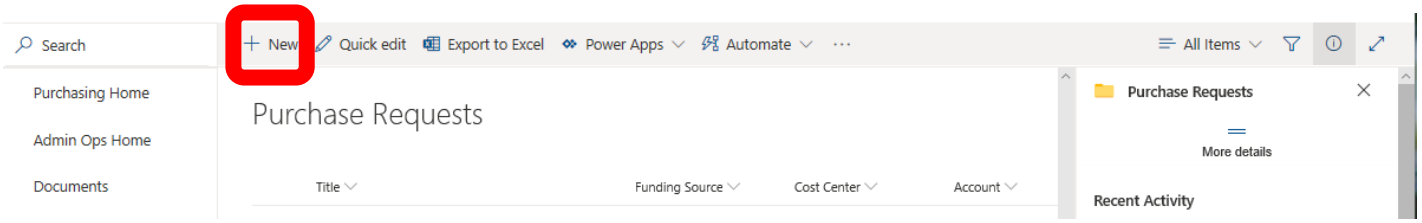
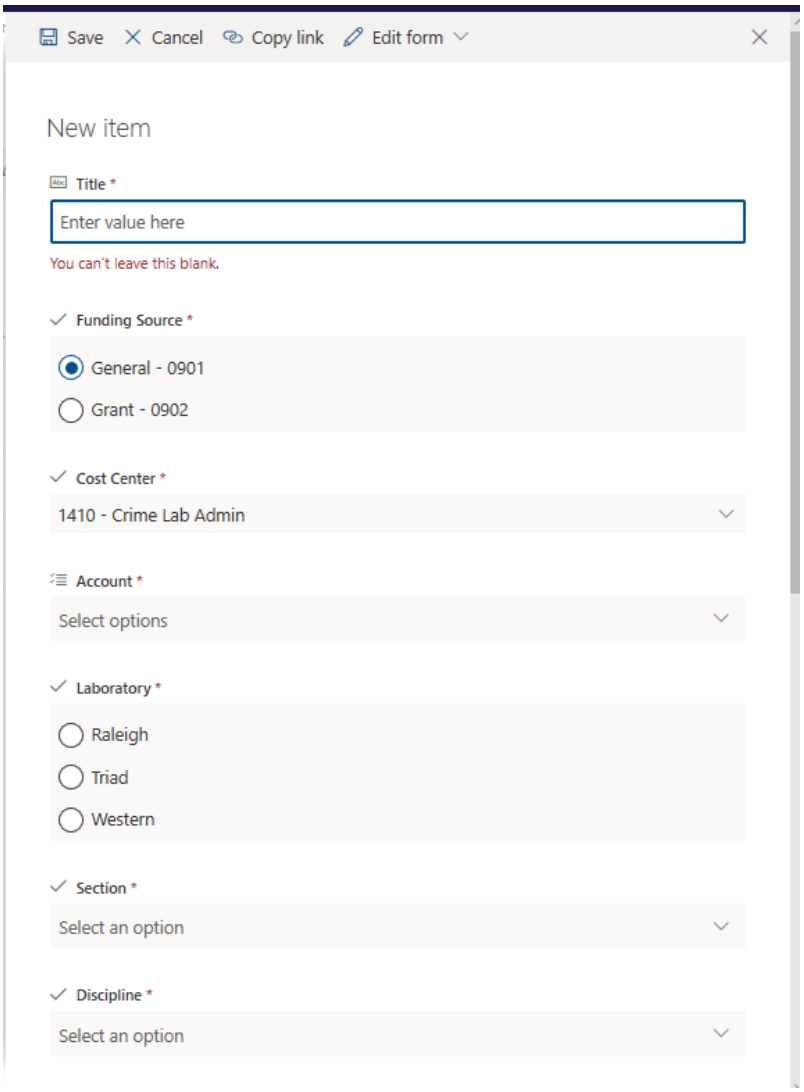
Instructions for Electronic Purchase Requests

1.0 All purchase requests must be submitted using SharePoint.

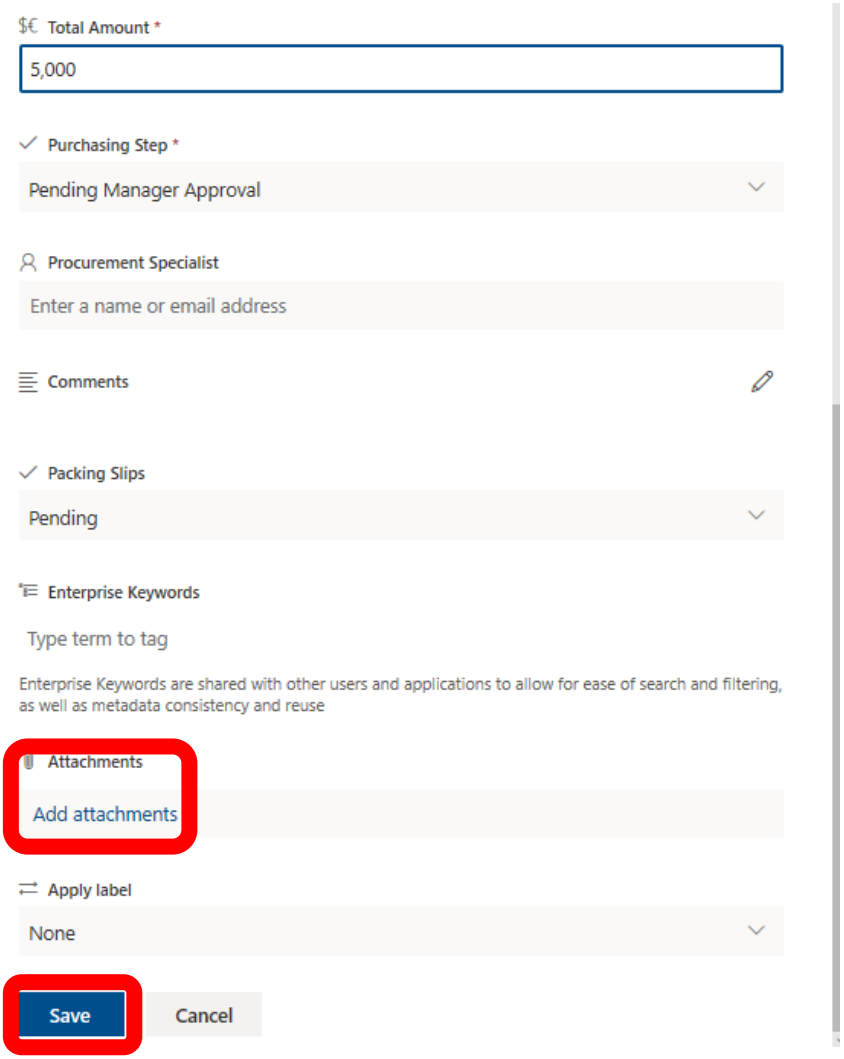
2.0 To initiate a purchase request, the employee responsible for creating the order will start a new purchase request by clicking +New.



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.



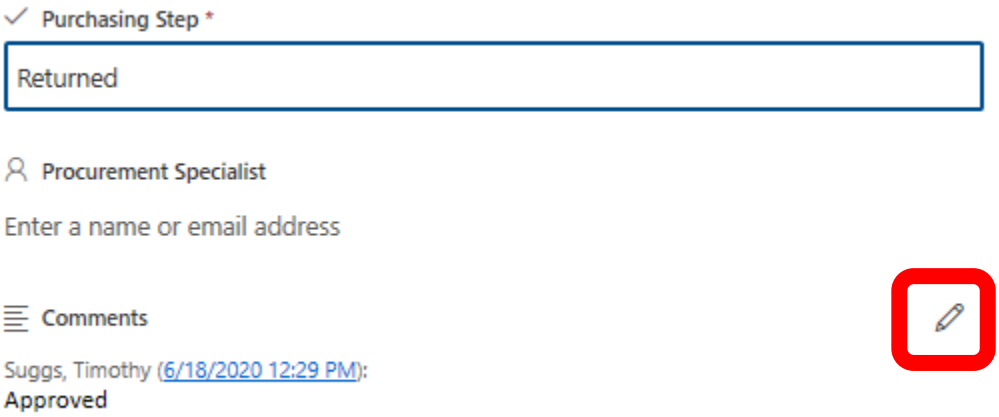
4.0 Attach the purchase request form and quote for all orders. For orders greater than or equal to $5000 also attach the sole source letter, end user memorandum, and Waiver of Competition form. To attach these items, click Add attachments. Select the file from your PC to upload. Repeat for each attachment.



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.

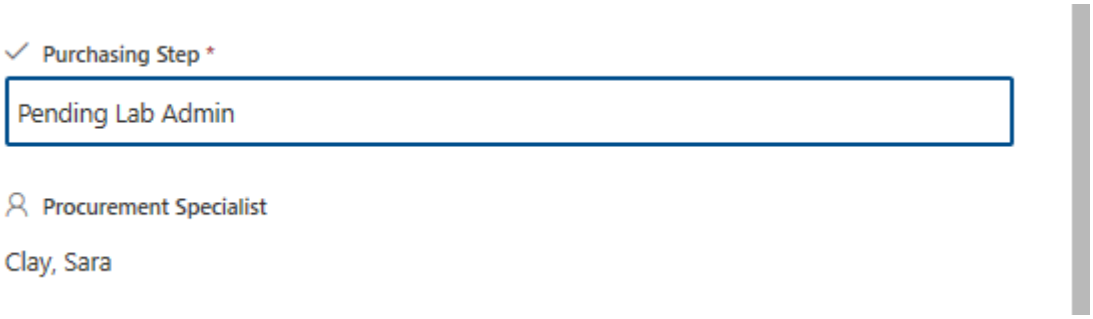
7.0 The procurement specialist will add his/her name to the Procurement Specialist Column and review the purchase request. If the request needs additional information, the procurement specialist will change to Purchasing Step to Returned and add a Comment to the purchase request indicating what needs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



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.

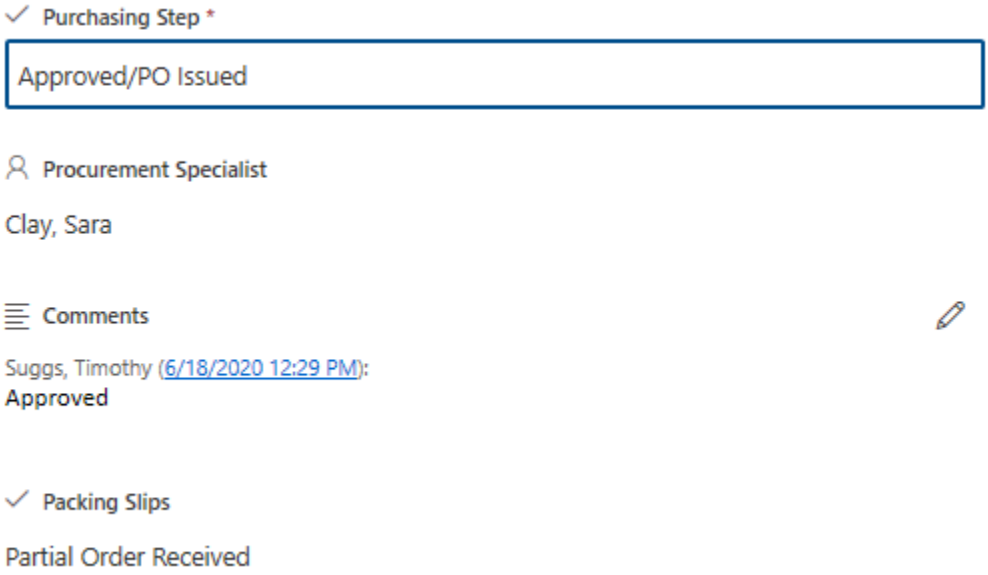
10.0 Once the purchase request is complete, the procurement specialist will change the Purchasing Step to Pending Lab Admin.



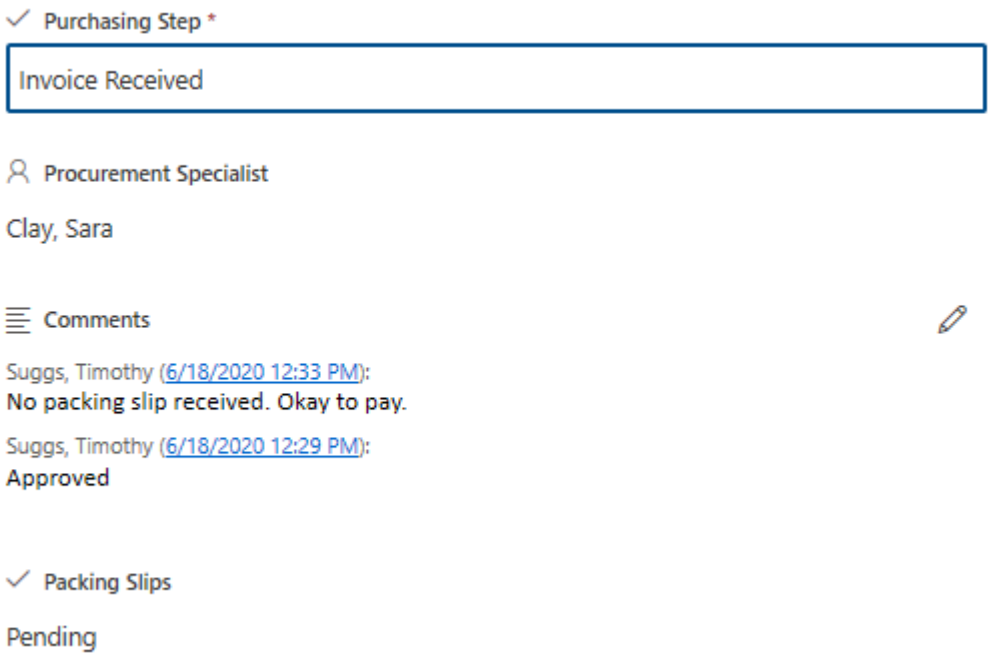
11.0 Lab Admin will review the purchase request and either send the request to DOJ or deny. If the request is denied. The Purchasing Step will be marked Closed and a comment will be added denoting that request was denied. If Lab Admin approves the request, the Purchasing Step will be changed to Pending 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 $10,000, there is an additional step for State P&C to review and approve the order prior to issuing the purchase order.

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.

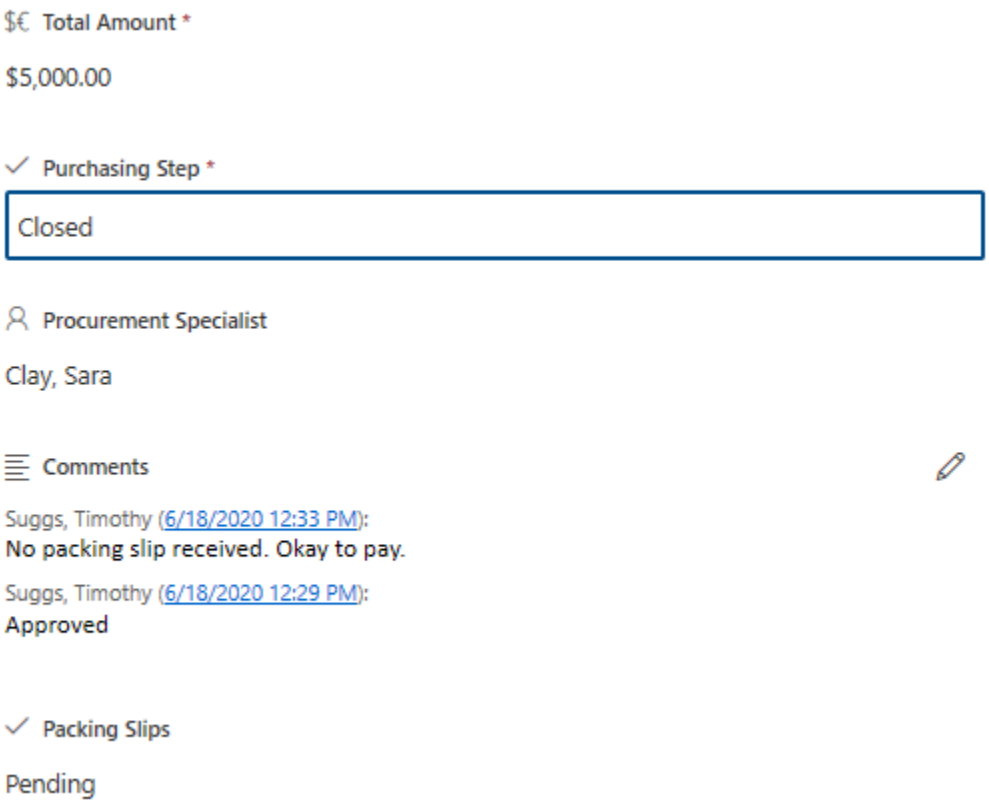
13.0 When the order is received and reconciled according to the Procedure for Procurement and Receipt, the packing slips will be scanned and attached to the purchase request. The Packing Slips column will be changed from Pending to Partial Order Received or Order Received. If a partial order is received, the additional packing slips will be added when the remainder of the order is received. When all items have been received, the Packing Slips must be changed to Order Received.



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. If there are no packing slips, a comment will be added to the purchase request stating that no packing slip was received and that the order is okay to pay.



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.



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