

Entering a Deviation Request (O8) for a Service Contract

Overview

AS Materiel Division - State Purchasing Bureau can grant exceptions to the competitive bid process on sole source, emergency services, and other unique services.

The deviation request must include an attachment of the draft contract, an estimated dollar value of the contract, and the Agency Director's approval via Approval Routes (to set up Approval Routes for Deviation Requests, navigate to the [Approval Route Worksheet](#) on the AS - Materiel website). Justification for sole source, emergency, or other exceptions should be included in an attachment. Justification should fully explain why the service cannot be competitively bid or details of the emergency or specialized situation.

For emergencies, a copy of the contract signed by the vendor and agency director must accompany the deviation request. Once the data has been entered into a Request for Deviation from Service Contract and it has been approved, the document will be generated into an Exempt Purchase Requisition for Services (Z6) or Services Contract (O4) and processed by the Agency.

This work instruction shows how to [Enter Request for Deviation for Service Contract \(O8\)](#).

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. State Statutes and Executive Orders provide the requirements for procuring commodities and services. Any questions regarding policy should be directed to AS Materiel Division. It is the responsibility of the agencies to comply with State Statutes and Executive Orders.

Navigation

Click Roles, Procurement.
(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

Purchasing – Agencies > Deviation Request > Enter Deviation Request (O8)

Steps

Enter Deviation Request for a Service Contract

Start this instruction from the Enter Deviation Request (O8) – Work with Order Headers window.

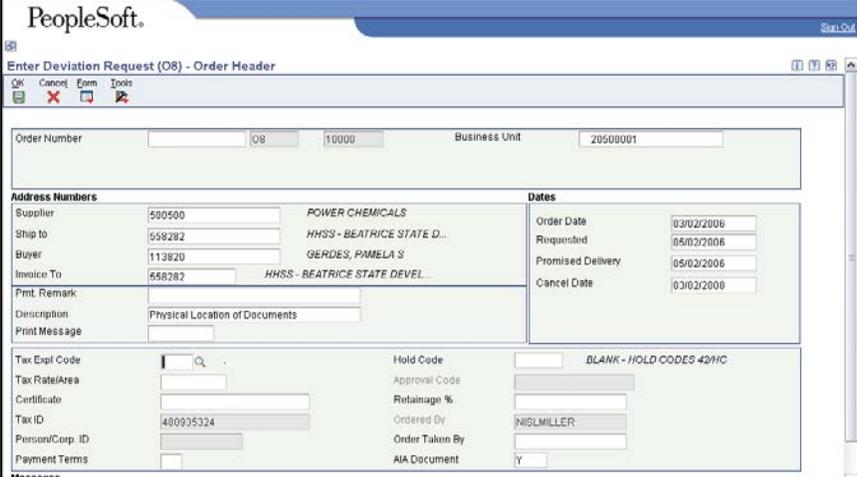
1. Click **Add**. The Enter Deviation Request (O8) – Order Header window appears.

2. Complete the following fields:

- **Address Numbers**

- Supplier – Use vendor you have identified to receive this contract.
- Ship To – Location where services are to be performed; If multiple locations, A/B # 559783 (FACILITY, MULTIPLE ADDRESSES) can be used
- Buyer – Individual who is primarily responsible for this Deviation Request/Service Contract at the AGENCY
- Send Invoice To – automatically populates but can be overridden; not required by system but necessary for vendor invoicing

- Payment Remark – "legacy contract number" or other identifying information that agency wants to enter
- Contract Location/Desc – physical location of documents specific to this Deviation Request/Service Contract
-  **Payment Remark** field must be populated per State Statute 73-503(4)
- **Business Unit** – BU accountable for the order – The Business Unit type should always be an "IS" – Income Statement
- **Dates** – defaults to current date but can be overridden
 - Order Date – The **entry** date that this Deviation Request is entered into NIS
 - Requested – The **beginning** date you want for the service contract. Current date defaults and can be overridden
 - Scheduled Pick – This field will not be used to identify any dates specific to the Service Contract that you are working on
 - Cancel Date – The **expiration** date of the service contract
-  **Cancel Date** field must be populated per State Statute 73-506(2)



PeopleSoft.

Enter Deviation Request (O8) - Order Header

Order Number: O8 10000 Business Unit: 20500001

Address Numbers

Supplier: 500500 POWER CHEMICALS

Ship to: 558282 HHSS - BEATRICE STATE D...

Buyer: 113820 GERDES, PAMELA S

Invoice To: 558282 HHSS - BEATRICE STATE DEVEL...

Dates

Order Date: 03/02/2006

Requested: 05/02/2006

Promised Delivery: 05/02/2006

Cancel Date: 03/02/2006

Print Remark: Physical Location of Documents

Print Message:

Tax Expt Code: Hold Code: BLANK - HOLD CODES 42/HC

Tax Rate/Area: Approval Code:

Certificate: Retainage %:

Tax ID: 480935324 Ordered By: NIS/MILLER

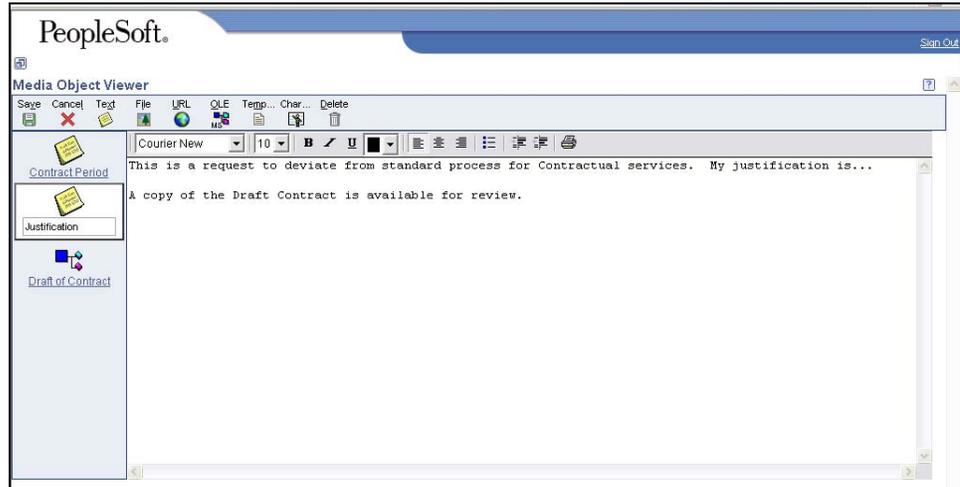
Person/Corp. ID: Order Taken By:

Payment Terms: AIA Document: Y

Messages

-  Any information that applies to the entire Request for Deviation will be entered via a text attachment to the Order Header. Please note, only the first attachment will appear on the printed document. Justification should be included as a subsequent text attachment, as it should not print on the request document. For step-by-step instructions on adding an attachment, please refer to the [Enter Attachments to Order Header](#) work instructions.
-  You may have electronic documents (Word, Excel, PDF) that are specific to your Request for Deviation and resulting service purchasing documents. (ex. draft of contract) Attach these documents to your NIS electronic document as an Object Linking and Embedded (OLE) attachment. OLE attachments *do not* print on the actual purchasing document and are a separate file; however, this does provide on-line documentation tied directly to your document. For emergencies, a copy of the contract signed by the vendor and agency director must accompany the deviation request.

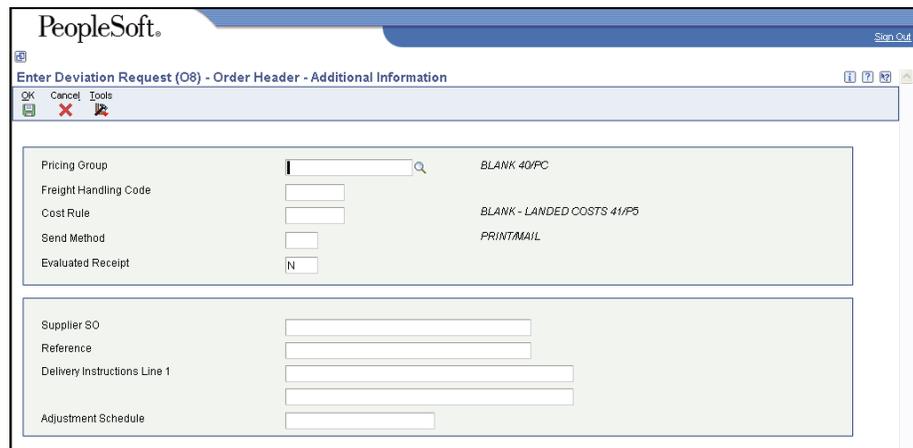
See below for an example of Order Header Attachments that meet requirements of the Statutes:



3. Click **Save**. The Order Header window appears.

 Once you have entered attachments specific to your service purchasing document, you need to include "additional information" that is specific to your contract.

4. Click **Form, Additional Info**. The Enter Deviation Request (O8) – Order Header – Additional Information window appears.



5. Complete the following fields:

- **Reference** - Enter the **renewal options** for your service contract; for example: Ren Opt: 3 (1-year) or Ren Opt: 1 (2 year). This free form text (up to 25 alphanumeric characters) that will print on your purchasing document.
- **Delivery Instructions** - Enter the free form text (up to 30 alphanumeric characters) that you want to print on your purchasing document.

6. Click **OK**. The Order Header window appears.
7. Click **OK**. The Enter Deviation Request (O8) – Order Detail window appears.

Order Detail		Line Defaults	
Order Number	17134 O8 10000	Business Unit	20500001
Supplier	500500 POWER CHEMICALS	Order Revision	
Ship To	558282 HHSS - BEATRICE STATE DEVELOPM	Order Date	03/02/2006
Hold Code	BLANK - HOLD CODES 42/HC		
Retainage %			

Records 1 - 3									
	NIGP Number/ Inventory Number	3-Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pl. UoM	Description 1
<input type="checkbox"/>	93446	934	46	1.0000	EA	55000.0000	55,000.00	EA	Lawn Spraying
<input type="checkbox"/>	93446	934	46	1.0000		40000.0000			Lawn Equipment Maintenance

-  The new Order Number and Order Type will appear and should be recorded if you wish to do more work with them or facilitate searches later.
8. Complete the following information for each detail line:
 - **NIGP Number/Inventory Number** – number represents the NIGP Commodity Code. If you need to find the applicable 5-digit code, note that all Services will be => 90000
 - **3-digit NIGP** – three-digit commodity classification code (from your Inventory Number)
 - **NIGP Sub** – two-digit commodity code suffix (from your Inventory Number)
 - **Quantity Ordered** – Options include hourly rates (i.e. 40 HR if you are entering details for a work week; 80 HR if you are entering details for a bi-weekly period; 1 EA if you are entering details for a specific Deliverable.)
 - **Tr. UoM** – system defaults to EA – override this with the appropriate unit of measure if necessary
 - **Unit Cost** – the estimated cost per unit
 - **Description 1** – enter descriptive data pertaining to the specific detail line. This is free text – *will* print on quotation request, contract, or purchase order.
 - **Description 2** – enter descriptive data that you want to appear in NIS and on a Purchase Requisition, Purchase Order, or contract, but not on a Quotation Request. This is free text – *will* print on quotation requests
 - **Account Number** – valid business unit and object account from the Chart of Accounts
 - **Request Date** – Automatically populates from the "Request Date" on the Order Header. The end user should change this, if necessary, to the "Request Date" for the specific "Deliverable" for this detail line.
 - Other fields as required by your agency

-  Line Attachments (both Text and OLE) can be made to each detail line of your service purchasing document.
 -  Use the down arrow on the keyboard to move the cursor to the next line if required.
9. Repeat entry of all Detail Lines (Step 21) until all lines of data are entered, then proceed to Step 23.
 10. Click **OK** to return to the Order Header window.
 11. Click **Cancel** to return to the Work with Order Header window.
 12. Click **Close**.