

# DGS NCB Portal

## Requestor (User) Instructions

These instructions are for use by requesters of Non-Competitive Bid approvals (NCBs) via the NCB Portal, a software tool provided by the California Department of General Services (DGS) to departments and agencies across California state government.



## Introduction

A Non-Competitive Bid (NCB) is limited by statute in accordance with Public Contract Code sections 12102, 10301/10302, and 10340 for information technology (IT) and non-IT goods and services.

Special Category Requests (SCR) and Limited-to-Brand (LTB) requests are also forms of limited competition. The NCB Portal is used for all 3 types.

This instruction manual is intended for departmental requestors who wish to submit an NCB request to the Department of General Services (DGS).

DGS has developed the NCB Portal for several purposes:

- To assist departments and agencies (requestors) in completing and submitting NCBs, SCRs, and LTB requests.
- To provide guidance to requestors toward ensuring that the requests comply with state policy.
- To provide a modern, online submission method that's more convenient for requestors and DGS, compared to past paper-based methods.
- To provide better visibility and tracking for departments and agencies to see and know the status of their requests.

## GLOSSARY

- **Requestor:** A requestor is a type of user ID in the NCB Portal. A requestor enters the details of the NCB request, and routes it to the Approver(s) with the department or agency. A separate manual is available from DGS for use by Requestors in your department or agency.
- **Approver:** An approver is a type of user ID in the NCB Portal. Users of this type have authority to give initial approval on behalf of your department or agency to submit an NCB to DGS for final approval. Only DGS has the authority to give final approval of an NCB request. This manual is for use by Approvers in your department or agency.

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## HOW TO REGISTER

1. To submit an NCB request to DGS, you will need to register and receive an account on the NCB Portal. To register, navigate to <https://dgs.service-now.com/ncb> and select “Request NCB Access” on the login page:



Login

User name

Password

Remember me

[Forgot Password](#)

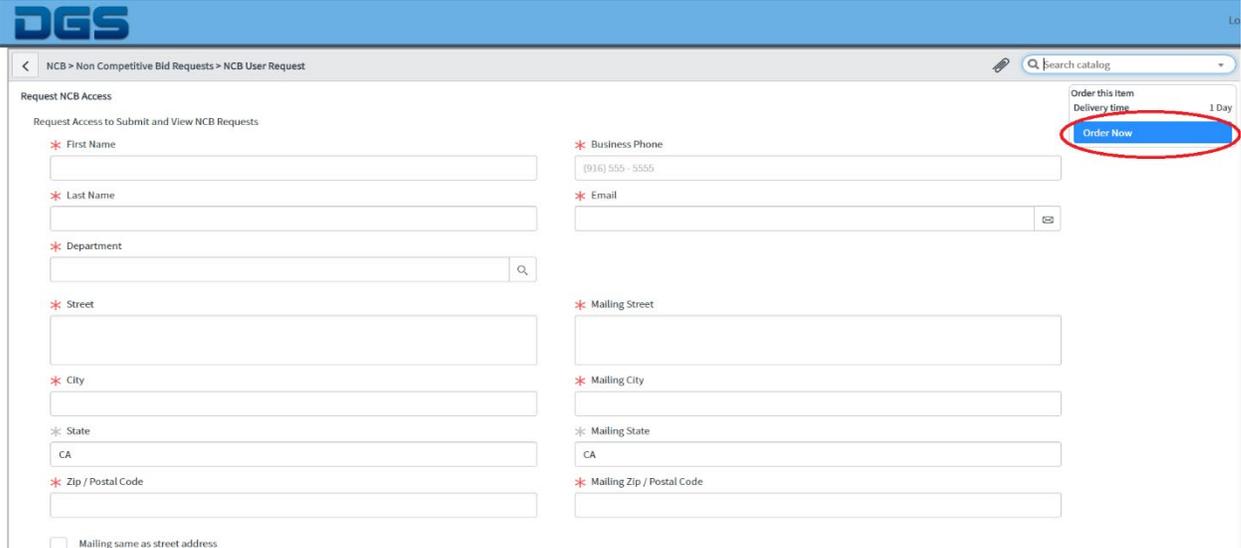
**Login**

DGS staff must click here to log in

 **Request NCB Access**

Trouble signing in? You can send an email to [PDNCB@dgs.ca.gov](mailto:PDNCB@dgs.ca.gov), from your state-issued email address; in your message, request a password reset.

2. Fill out all the required fields and click “Order Now”.



**DGS**

NCB > Non Competitive Bid Requests > NCB User Request

Request NCB Access

Request Access to Submit and View NCB Requests

\* First Name

\* Last Name

\* Department

\* Street

\* City

\* State

CA

\* Zip / Postal Code

\* Business Phone

(916) 555 - 5555

\* Email

\* Mailing Street

\* Mailing City

\* Mailing State

CA

\* Mailing Zip / Postal Code

Mailing same as street address

Order this Item  
Delivery Time: 1 Day  
**Order Now**

3. Your request will be submitted to your department or agency’s Procurement and Contracting Officer (PCO) for approval.

- Once your PCO approves your request, you will be sent an email with your username and temporary password. Note: The username is your email address.
- Return to the DGS NCB login screen <https://dgs.service-now.com/ncb> and create a permanent password.

## CREATING A NEW NCB REQUEST

- Navigate to <https://dgs.service-now.com/ncb> (you may wish to bookmark this link for use in the future) and click on the “Submit New Request” icon.



- Complete the required fields (\*) labeled *Short Description*, *Description*, and *Department*.

- Below the Billing Code, click on the tab labeled **Department Contact Information** and fill in the required fields (\*). Click the “Save” button to save the record. Clicking the “Save” button saves your work without submitting the NCB request to DGS.

- Click on the next tab, **Technical Contact Information**, and fill in the required fields (\*).
- Continue and complete the information in the next 3 tabs. These tabs are **Required Contract Information**, **Contract Type and Term**, and **Justification Information**. Once the information is completed, click the “Save” button in the upper right-hand corner.

## **INTERNAL APPROVALS, IF REQUIRED INTERNALLY, BEFORE YOUR DEPARTMENT’S PCO**

- Depending on your department’s internal policies, internal approvals may be required prior to the department’s PCO. If your department requires this, you can request their approvals by adding individuals to the “Watch List”. To do this, first click on the **Activities** tab. Once in the **Activities** tab, look for the  button located in the upper left-hand corner to edit the “Watch List”. Click that button. That opens the watch list.
- Once the watch list is opened, use the  button to select users to add:

- Once all name(s) have been added, click the  button to collapse the list. Then, type some text in the “Additional Comments” field – the users you specified will see this text, so use the example shown above, tailored to your needs, to request the identified individual(s) to review and approve the request. Click the “Post” button. Clicking the “Post” button will send an email notification to all the individuals on the watch list.
- Once the NCB information has been reviewed and vetted by the individuals on the “Watch List”, click the “Ready for Approval” button to send the request to the PCO for approval.

The screenshot displays the 'NCB Contract Justification - NCB20201745 [NCB Form view]' interface. At the top right, the 'Ready for Approval' button is highlighted with a red circle. Below the navigation tabs, the form contains the following fields:

- Number: NCB20201745
- Justification Type: LTB
- \* Short description: 66-03 Survey Equipment, Trimble
- \* Description: LTB Request for Limited To Brand survey equipment, Trimble brand.

Under 'Requesting Organization Information':

- \* Requesting Organization: Transportation, Department of
- Agency: Transportation Agency, California State
- \* Billing Code: (empty field)

At the bottom, there are sections for 'Watch list' (showing Amanda Lewis) and 'Work notes'.

## NCB APPROVAL PROCESS AT DEPARTMENT/AGENCY LEVEL

- Once the “Ready for Approval” button is pressed, the portal will automatically email the requesting department’s PCO for approval. The PCO enters their decision using the portal.
- Once approved by the PCO, an email will automatically be sent to all DGS-certified approvers within that Department. Note: Departments may have between 1 to 3 DGS certified approvers (i.e., Director, Chief Deputy Director, Deputy Director). Approval is required by **only 1** of the 3 DGS certified approvers, if applicable.
- Next, an email will automatically be sent to all DGS-certified approvers at the corresponding Agency (if applicable; some departments may not have Agency approver). Note: An Agency may have between 1 to 3 DGS-certified approvers. Approval is required by **only 1** of the 3 DGS certified approvers at the Agency level, if applicable.
- After an NCB has been approved by the Department and Agency (if applicable), the NCB will be sent to DGS, starting with the NCB Intake box. Once your request is received, DGS staff may contact you for clarification or additional information.

## CANCELLING AN NCB REQUEST

1. If the request is in a “New” or “Department/Agency Approval” state, the requestor can cancel the NCB request. Only NCBs in the above states can be cancelled in the portal. To cancel the request, click the “Cancel NCB” button.

The screenshot shows the 'NCB Contract Justification - NCB0001518 [NCB Form view\*]' interface. At the top right, there is a toolbar with buttons for 'Follow', 'Update', 'Cancel NCB', 'Copy NCB', 'Save', and 'Delete'. The 'Cancel NCB' button is circled in red. Below the toolbar, there is a description field containing text about surface water supplies and groundwater. Underneath is the 'Requesting Department Information' section with fields for 'Department' (Department of General Services), 'Agency', and 'Billing Code'. A horizontal menu below this section includes 'Instructions', 'Department Contact Information', 'Technical Contact Information', 'Required Contract Information', 'Contract Type and Term', 'Justification Information', and 'Analysis'. The 'Activities' tab is selected, showing a 'Closeout' section with 'Watch list', 'Work notes list', and 'Additional comments (Customer visible)' fields. A 'Post' button is located at the bottom right of the 'Additional comments' field.

2. Under the “Activities” tab, in the “Additional Comments” field box, state why this request is being cancelled. Then click the Save button to cancel the NCB request.

This screenshot is similar to the one above, but with red arrows highlighting specific elements. One red arrow points to the 'Save' button in the top right toolbar, which is also circled in red. Another red arrow points to the 'Additional comments (Customer visible)' text area in the 'Activities' tab, indicating where the user should enter the reason for cancellation. The rest of the interface, including the description, department information, and other tabs, remains the same as in the previous screenshot.

## MONITORING PROGRESS AND RECEIVING DGS' DECISION ON YOUR NCB

An automatic email notification will be sent to you when DGS' decision has been made. Also, you can monitor your request through every step of the process.

1. DGS' decision has not been issued until you see **Completed** in the State field:

The screenshot shows the 'CB Contract Justification - NCB20191522 [NCB Form view\*]' interface. At the top, there are action buttons: 'Follow', 'Update', 'Cancel NCB', and 'Copy NCB'. Below this is a process flow diagram with six steps: 'Dept / Agency Approval' (checked), 'Intake at DGS' (checked), 'Assignment' (checked), 'In Analysis at DGS' (checked), 'Under Mgmt Review at DGS' (checked), and 'Pending Closeout at DGS' (checked). Below the flow diagram, there are input fields for 'Number' (NCB20191522) and 'Justification Type' (NCB). To the right, the 'State' field is set to 'Completed', with a red arrow pointing to it.

2. If you see **Completed** in the State field, click on the Closeout tab:

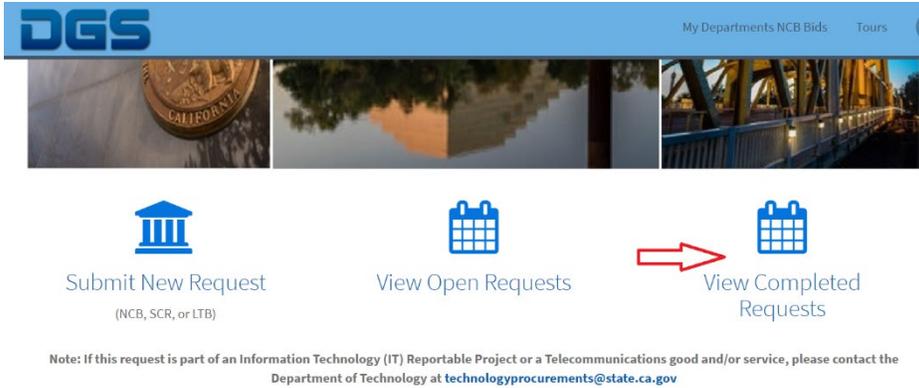
The screenshot shows a tabbed interface with four tabs: 'Information', 'Analysis', 'Closeout', and 'Activities'. The 'Closeout' tab is currently selected and highlighted with a blue border.

3. The decision will be shown in the Final Approval field:

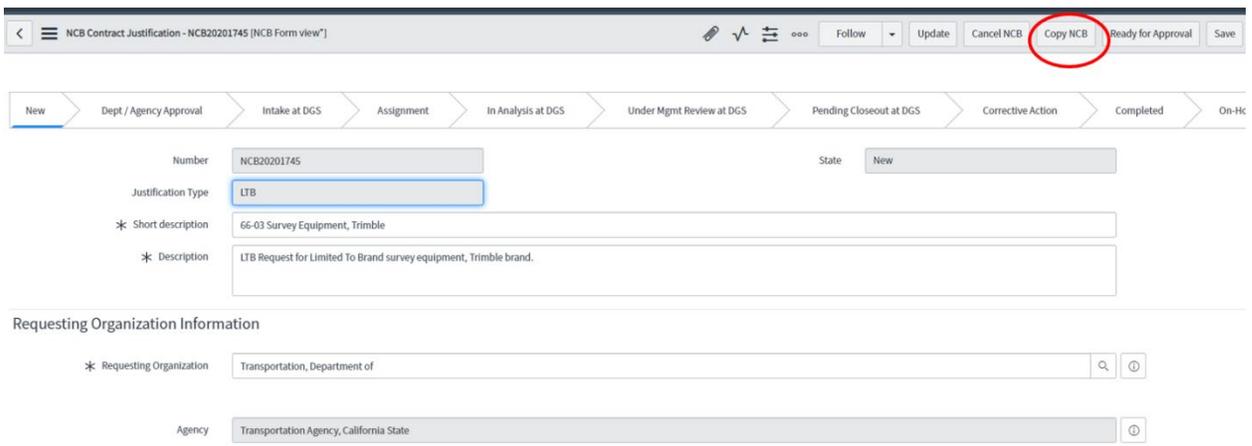
Final Approval	Approved
Conditions	-- None --
Approval / Denial Comments	
Closed	2020-07-28 03:45:48 PM

## COPYING AN NCB RECORD

1. As a convenience when opening a new NCB request, to avoid the work of re-typing certain information in common, an existing NCB request can be copied. Copying will auto-fill contacts and other information from the previous NCB record, but not the Justification, and not the Contract Type and Term. To copy a previous NCB record, start by clicking the "View Completed NCBs" button to view a list of NCB records.



2. Select the NCB record you wish to copy.
3. Once the record is opened, click the “Copy NCB” button.



4. A new NCB request will open up, with certain information filled in from the previous NCB. The following tabs will not be copied: **Justification** and **Contract Type and Term**, as noted above.
5. Click the “Save” button to save the new request. You can now make the necessary updates to the new request.

## **CORRECTIVE ACTION PLAN**

1. If a Corrective Action Plan (CAP) is required by DGS as a result of its review, the department contact listed on the NCB request will receive an email notification. Click the link in the notification email to open the CAP task.
2. Review the CAP instructions and submit required information by due date indicated.

NCB Contract Justification Task  
NCBTASK0001185 [NCB Form view]

Number: NCBTASK0001185      Priority: 4 - Low

NCB Contract Justification: NCB0001584      State: Open

Contact: Zach Zaxman the 4th      Task Type: Corrective Action Plan

PCO: Steve Rucker

\* Short description: test3

Description:

\* Corrective Action Reason: Failure to Utilize Competition

\* CAP Date: 2018-02-27

\* CAP Instructions: test

CAP Requirements    Activities    User Request

\* CAP Requirements: Basic Acquisition Training Required

Basic Acquisition Training Required: 2018-03-09

Basic Acquisition Training Required

Note: You can submit comments or updates to the CAP through the “Activities” tab in the additional comments field.