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Contact Information

For questions regarding CRS Application account creation, please contact

Professional Services Management Unit (PSMU)
psmu-411@ncdot.gov

For password resets and other CRS Application account issues, please contact

SAP Support Services
919-707-2208
DOTITSAPSupportServices@ncdot.gov

For Prequalification Application questions, please contact your company's Prequalification representative or

Prequalifications Management
prequal@ncdot.gov

For questions regarding approval status of your company's Salary Rates, Overhead(s), or Cost(s) of Capital, please contact

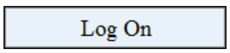
Consultant, Utility, Railroad & Turnpike (CURT) Unit
residing under
Office of Inspector General in the NCDOT Directory

Navigation Basics

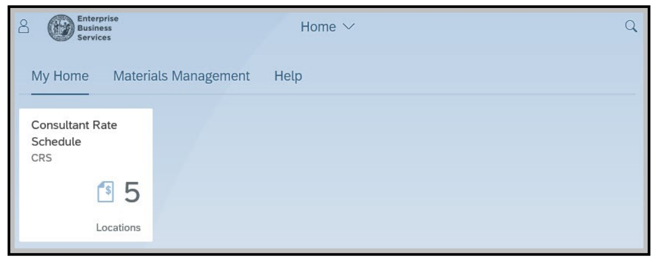
Log On

To log on the Consultant Rate Schedule (CRS) System, you will need an EBS user ID and password. If you have forgotten your ID or password, contact SAP Support Services at 919-707-2208 or DOTITSAPSupportServices@ncdot.gov. Tell the Help Desk Technician that you are an external user for the CRS System.

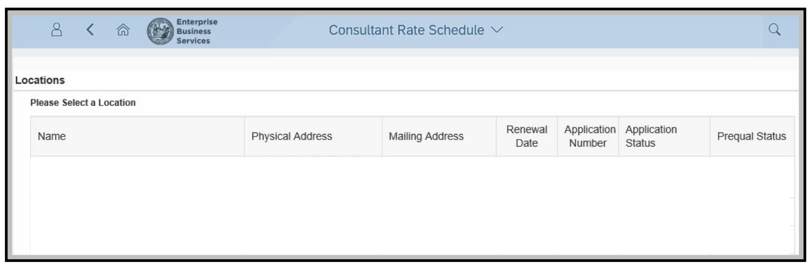
1. Navigate to https://ebs.nc.gov/irj/portal The log on screen displays.

2. Enter your *user ID* in the **User** field.
3. Enter your *password* in the **Password** field.
4. Click 

. The EBS Portal home screen displays.



5. Click the **Consultant Rate Schedule - CRS** tile. The ***Consultant Rate Schedule (CRS) Application*** screen displays the **Locations** section.



Log Off

1. Click the User Icon .
2. Select 

3. Click **OK**

Navigate Within an Application

- Use the scroll bar to display additional line items.
- Click the **Go Back To Locations** link on the left side of the screen to return to the **Locations** section.

CRS System Overview

The Consultant Rate Schedule System collects staff hourly rates, overhead percentage rates, and other information from private consulting firms (PCFs) that are prequalified to do business with NCDOT. If a firm has multiple offices or locations, a separate application is created for each location.

Locations

Please Select a Location

Name	Physical Address	Mailing Address	Renewal Date	Application Number	Application Status	Prequal Status
Location 1	123 E West St			000000	In-Process	Approved
Location 2	11 Lane St	PO Box 999		000001	In-Process	In-Process

Locations Section

The Locations section defaults when the CRS system is accessed. Only locations prequalified as a PCF display in the Locations section. If you have a location that is prequalified as a PCF but does not display in the Locations section, contact the PSMU at NCDOT.

Name—name of location; click link to create, continue/change/correct, or display an application

Physical Address—physical address for the location

Mailing Address—mailing address for the location (if applicable)

Renewal Date—indicates when new staff hourly rates may be submitted for previously approved employees

Application Number—unique identifier for application; assigned when **Create New Application** is clicked

Application Status—status of application; controls actions that can be performed
(Refer to the table on page 4 for additional information about application statuses and actions.)

Prequal Status—firm's prequalification application status—information only

Application Statuses

Most actions will change the application status to *In Process*, even if no data was added, deleted, or changed. However:

- Submitting the application changes the status to *Submitted for Approval*.
- If the application status was already *In Process*, it remains *In Process* unless you submit it.
- The *Display Application* action does not change the application status.

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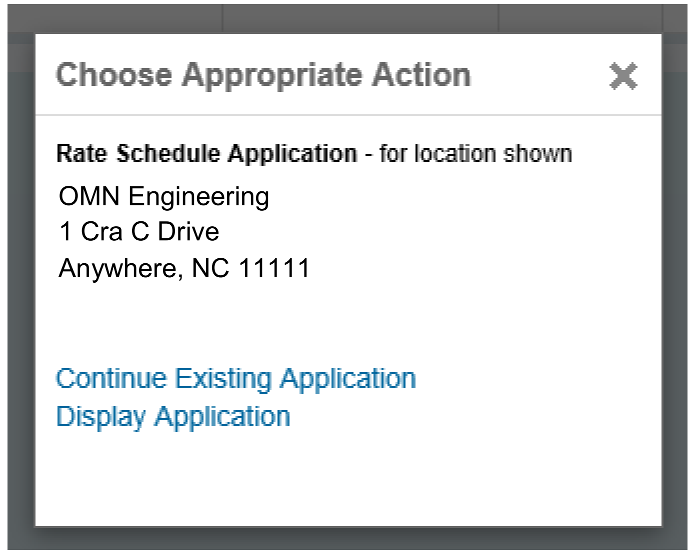
Application Approval vs Rejection

When an application is submitted, NCDOT reviews the data and either approves or rejects the application. After an application is approved, the application should be displayed and the approved data reviewed. An application may be rejected if information on the application does not match information already provided to NCDOT. The application must be submitted again, even if no changes are required.

Choose an Action

Clicking a link in the **Name** column of the **Locations** section displays the ***Choose Appropriate Action*** dialog box. The actions available depend upon the status of the application. (Refer to the table below for additional information about application statuses and actions.) Click a link to perform the desired action.

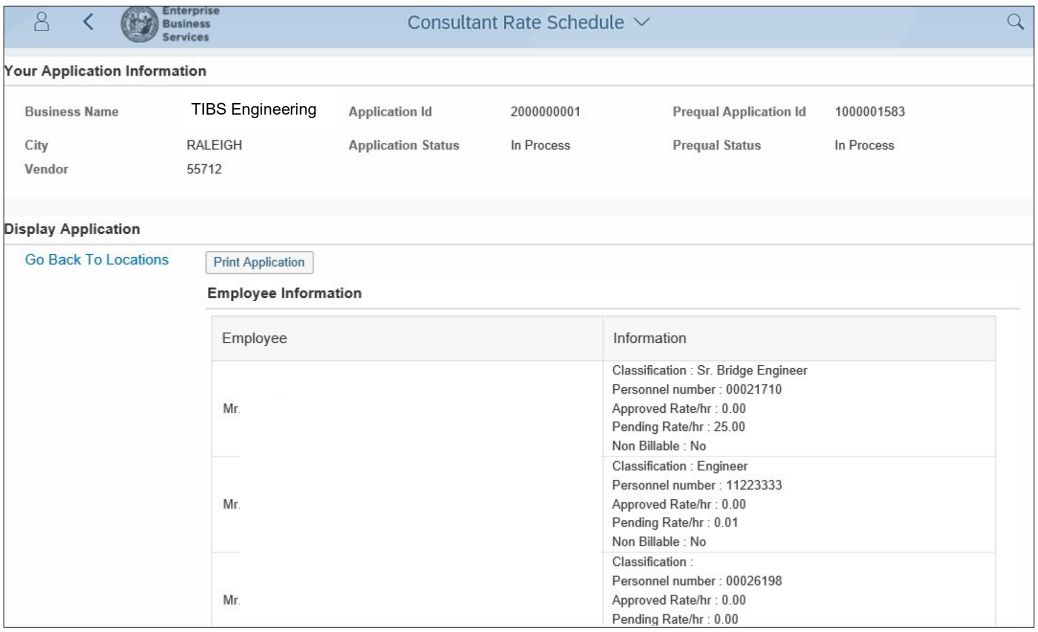


Application Status	Available Actions
[no status] application not yet created	**Create New Application** (data may be added, deleted, or changed)
In Process application not submitted	**Continue Existing Application** (data may be added, deleted, or changed)
	Display Application (data may be displayed only)
Submitted for Approval application submitted to NCDOT	**Display Application** (data may be displayed only)
Approved application approved by NCDOT	**Change Approved Application** (data may be added, deleted, or changed depending upon renewal date)
	Display Application (data may be displayed only)
Rejected application rejected by NCDOT	**Correct Existing Application** (data may be added, deleted, or changed, depending upon renewal date)
	Display Application (data may be displayed only)

Display Application

Use this procedure to display an application.

1. Navigate to the ***Consultant Rate Schedule (CRS) Application*** **Locations** section.
2. Click the desired location in the **Name** column. The ***Choose Appropriate Action*** dialog box displays.
3. Click **Display Application**.
4. Review the application data.

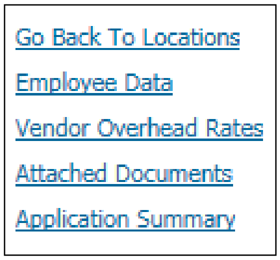


- **Your Application Information** section—displays the location name, city, SAP Vendor number, application Id and application status. (For Info Only—Prequal Application ID & Status)
- **Employee Information** and **Officer Information** sections—display personnel numbers, classifications, and staff hourly rates for employees and officers. Non-Billable Status, if applicable
- **Vendor Overhead Rates** section—displays various overhead rates for the location
- **Archived Documents** section—displays a list of documents attached to the application by date, with the most recent attachment first

  Click a link in the **Document Type** column to display the attachment, if desired. Click to close the attachment screen

5. Print the application, if desired.
   - Click Print Application .The ***Display Application [number]*** dialog box displays.
   - Click on the floating tool bar. The ***Print*** dialog box displays.
   - Click Print .
   - Click to close the ***Display Application [number]*** dialog box.
6. Click the **Go Back To Locations** link to return to the **Locations** section.

Create New Application



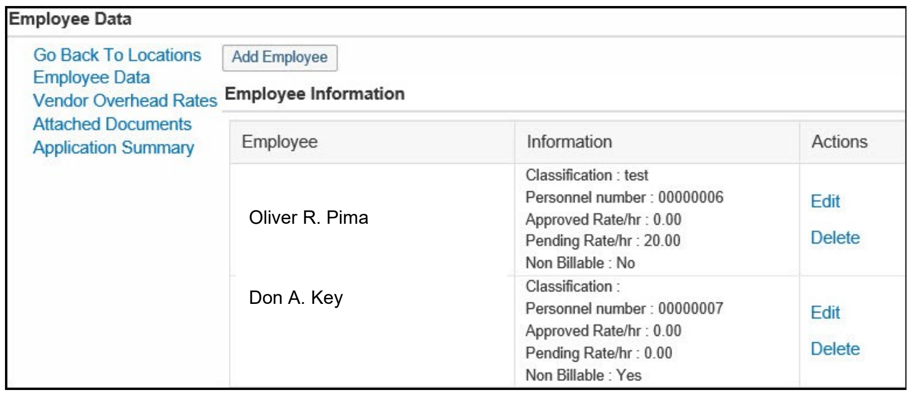
The application creation process is divided into four parts. Each part is accessed by clicking the appropriate link shown on the left side of the screen. New and changed data is saved within each section. The application is not transmitted to NCDOT until it is submitted in the Application Summary section.

1. Navigate to the ***Consultant Rate Schedule (CRS) Application*** **Locations** section.
2. Click the appropriate location in the **Name** column. The ***Choose Appropriate Action*** dialog box displays.
3. Click **Create New Application**. The Employee Data section defaults.

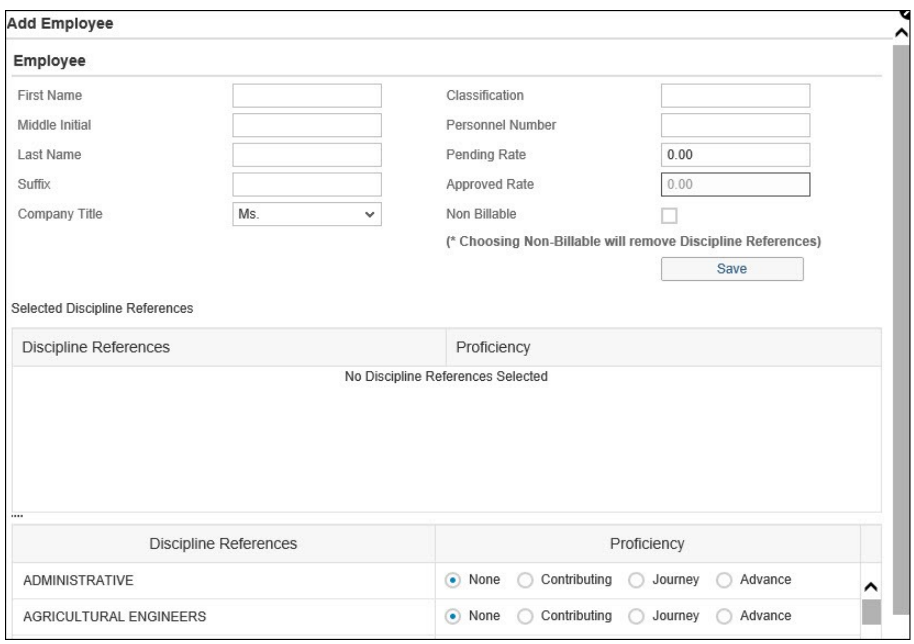
Employee Data

This section allows the addition or deletion of new employees and officers, as well as the editing of employee or officer information that defaults from existing vendor data.

Add Employee or Officer



1. Click Add Employee or Add Officer. The ***Add Employee*** or ***Add Officer*** dialog box displays.
2. Enter values in the following fields:
   - **First Name**—first name
   - **Middle Initial**—middle initial
   - **Last Name**—last name
   - **Suffix**—any suffix, such as Jr. or III
   - **Company Title**—click ▾, then select a title (Mr. or Ms. are available for employees; other titles are available for officers)
   - **Classification**—job title
   - **Personnel Number**—personnel number
     Note: personnel numbers must be eight digits or less
   - **Pending Rate**—requested staff hourly rate
   - **Non-Billable**—select to indicate status of employee/officer on NCDOT Projects



3. Select the appropriate radio button in the **Proficiency** column for each **Discipline Reference** that applies to the employee or officer.
   Note: Use scroll bar as needed to navigate to selected discipline references.

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Create New Application, cont.

Employee Data, Continued

4. Click Save. The ***Success*** dialog box displays.

   Note: If the ***Error*** dialog box displays, review the message, then click OK.

   - If the message indicates that information is incomplete, enter the necessary data, then click Save again.
   - If the message indicates that a pending rate for an employee or officer was entered before the renewal date, change the Pending Rate to match the Approved Rate, then click Save again.

5. Click OK.

6. Click to close the ***Add Employee*** or ***Add Officer*** dialog box. The employee or officer displays in the **Employee Information** or **Officer Information** subsection.

Delete Employee or Officer—employees or officers not involved with PreQual can be deleted. Attempts to delete individuals that are also relevant to PreQual will cause the individual to be refreshed to the CRS roster with Edit action only.

1. Click **Delete** in the **Actions** column. The ***Success*** dialog box displays.
2. Click OK.

Edit Employee or Officer Information—fields that are grayed out cannot be edited.

1. Click **Edit** in the **Actions** column. The ***Edit Employee*** or ***Edit Officer*** dialog box displays.
2. Make the necessary changes.
   Note: Refer to the *Add Employee or Officer* section for instructions, if necessary.
3. Click Save. The ***Success*** dialog box displays.

   Note: If the ***Error*** dialog box displays, click OK. Make the necessary corrections, then click Save again.

4. Click OK.
5. Click to close the ***Edit Employee*** or ***Edit Officer*** dialog box.

Vendor Overhead Rates

1. Select the **Vendor Overhead Rates** link.
2. Enter a percentage for each applicable overhead type in the **Pending** fields.
3. Click Save. The ***Success*** dialog box displays.
4. Click OK.

Vendor Overhead Rates (* Rates are in Percentages)

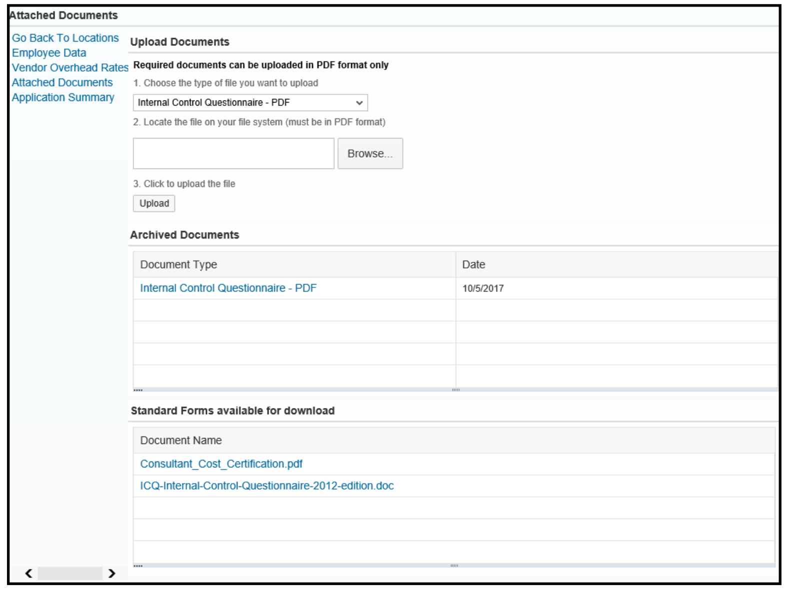
	Pending	Approved
Home Office Rate	0.00	0.00
Home Office Cost of Capital Rate	0.0000	0.0000
Field Rate	0.00	0.00
Field Cost of Capital Rate	0.0000	0.0000
Project Rate	0.00	0.00
	Save	

Topic continues on next page

Create New Application, cont.

Attached Documents

This section allows the attachment of PDF documents to the application. Selected standard forms can be downloaded, completed, and attached to the application.



Attach Document

1. Select the **Attached Documents** link.
2. Click below **Choose the type of file you want to upload**, then select a file type.
3. Click Browse . The ***Choose File to Upload*** dialog box displays.
4. Navigate to the desired PDF document, then double click the document.
5. Click Upload . The attachment displays in the **Archived Documents** subsection with the current date.

Download Standard Form

1. Click the link for the desired form in the **Standard Forms available for download** subsection. The ***Windows Internet Explorer*** dialog box displays.
2. Click **Save as**. The ***Save As*** dialog box displays.
3. Navigate to the Desktop or other desired location.
4. Click Save .
5. Click to close the blank document dialog box.
6. Complete the downloaded form as required.
7. Convert the completed form into a PDF document.
8. Attach the completed form.
   Note: Refer to the *Attach Document* section for instructions, if necessary.

Application Summary

If you are not ready to submit the application, click the **Go Back To Locations** link on the left side of the screen. Otherwise, perform the following to submit a completed application for approval:

1. Click the checkbox in the **Submit** subsection. Submit displays below the text.
2. Click Submit . The ***Success*** dialog box displays.

   Note: If the ***Error*** dialog box displays, review the message, then click OK . If the message indicates the application is incomplete, enter the necessary data, then click Submit again. If the message indicates a PreQual application is being processed, the CRS application can be submitted only when the PreQual application has the status of Approved.
3. Click OK . The **Locations** section displays.

Change Application

Application data may be added, deleted, or changed using any of the following actions: Continue Existing Application, Change Approved Application, and Correct Existing Application.

Pending rates for employees and officers with previously approved rates cannot be changed and saved until the renewal date listed in the Locations section. All other employee and officer changes can be made and saved for submittal. Overhead rates can be changed, saved, and submitted at any time.

Refer to the *Create New Application* procedure for specific instructions, if necessary.

1. Navigate to the ***Consultant Rate Schedule (CRS) Application*** **Locations** section.
2. Click the desired location in the **Name** column. The ***Choose Appropriate Action*** dialog box displays.
3. Click **Continue Existing Application**, **Change Approved Application**, or **Correct Existing Application**.

> ***TIP:*** To quickly locate an Employee or Officer by Name or Personnel number, use **Control + F**. The **Find** search field opens in the Search bar of your browser window.

4. Make changes as necessary.