| | TO-5 and TO-5-A Instruction Sheet |
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| NC DIT | NC Department of Information Technology Service Delivery<br>DIT Home Page Web Address: https://it.nc.gov/<br><br>DIT Service Desk:(919)-754-6000;1-800-722-3946<br>DIT Service Portal: https://ncgov.servicenowservices.com/sp_dit |

Note: This instruction sheet and the TO-5 and the TO-5-A forms, that are dated 11/08/10, supersede all other versions.

| Function | Instruction |
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| Open Form<br>Save Form<br>Print Form<br>Print Preview<br>Properties<br><br>Note: MS Office adjusts the forms to your default printer. When printing, this could cause margin and header inconsistencies; through no fault of your own. | "Enable Macros" if prompted. |
| | Open the TO-5 Form; name and save it (Save As) to your computer; Use that form. |
| | If prompted "Print outside Margins," answer Yes. If Prompted "Fix," answer No. While working, use Print Preview to verify that the form is still on one page. |
| | Open File / Properties to view the Author, Title, Version (Date), and Contact Information for the form. |
| | Before you start working on-line, Print the blank form and verify that the form has printed correctly, on one page. Print preview may not catch this problem. |
| Mouse, Enter Key, Tab Key and Arrow Keys | The TO-5 form should not be allowed to overflow onto multiple pages. |
| | Use the mouse, Tab key (Forward), Shift+Tab key (Backward) or Arrow keys (limited function) to move from field to field. In each field, the cursor stops on a rectangular shaded area where you can enter text. When you enter text in a field, do not let the text wrap around and create a new line. The only exception to this is the service request detail section "Describe the Service Request". |
| | In addition to adding too much text in a field, the Enter key may also cause your text to overflow the page. Correct page overflow by backspacing or selecting and deleting your input. (Delete key). You can also use the MS Word Undo function in the task bar. |
| | When entering your service request detail, in the section "Describe the Service Request", your input text will wrap automatically. Limited use of the Enter key is allowed in this section. You can start a new line or a paragraph and can use the Enter key at least 10 times before an overflow occurs. Use the mouse, Arrow keys, or the Shift + Tab keys, to return to and delete a previous line. |
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| Line Item Name (Field) | Line Instruction |
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| E-Rate Request | Check this box if this is an E-Rate request. |
| Process | Check this box if you have received SLD approval. |
| Pending | Check this box if you are waiting for SLD approval. |
| Date | Date you fill out this TO-5 and submit the service request. Format = mm/dd/yy. |
| Page | Number each Page, including the Addendum. |
| E-Rate Start Date | Date that the E-Rate work can be started. Format = mm/dd/yy. |
| Requested Due Date | Requested Due Date for completion of work. Format = mm/dd/yy. |
| Service Request Number (Internal Use Only) | The Service Request Number is assigned to the TO-5 by the Technology On-line Management System (TOMS) to create, distribute, and track work orders. This field is Internal Use Only (IUO). |
| Bill-To Number (Mandatory) | The Bill-To number is the telephone number of the department / division responsible for payment of the work completed. |
| Requestor Name | Name of the person (Requestor Name) who is ordering the work. |
| Requestor Telephone Number / Extension | Requestor Telephone Number / Extension. |
| Requestor E-mail | Requestor E-mail. |
| Requestor Fax Number | Requestor Fax Number. |
| Name (Requested For) | Name (Requested For) of the person you are making this service request for. |
| Telephone Number / Extension | Telephone Number / Extension of the person (Requested For) that you are making this service request for. |
| Federal ID | A Federal ID is a "Required" field when setting up a Department Code. |

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| Billing Location Code **(Internal Use Only)** | The Billing Location Code is a number in TOMS that provides a work location, a building name and a street address. **Internal Use Only (IUO).** |
| Floor (Work Location) | Floor number at the work location. |
| Room (Work Location) | Room number at the work location. |
| Account/Department Code | Previously the Billing Account Code (BAC). The Department Code enables precise billing of your phone service. Your Department Code number is on your phone bill. Department Code format = aaa-aaaa-aaaaaaaaaaaaaa = 4-4-15 = 25, where a = an alphanumeric character and the dashes are part of the total number of characters. |
| Department Name | The Department Name of the department or agency requesting this service. |
| Division | A Division is a functional entity of a department. |
| Street Address (Work Location) | The Street Address, is the physical location where the work is to be completed. <u>Do Not Use a PO Box Number.</u> |
| City / Town | City / Town where the work is to be completed. |
| Zip Code | Zip code where the work is to be completed. Zip Code format = ZZZZZ or ZZZZZ-ZZZZ. |
| County | County where the work is to be completed. |
| Old Street Address (Only for a move) | The Old Street Address, is the previous physical location that the client is moving from. |
| City / Town | Previous location City / Town. |
| Zip Code | Previous location Zip Code. Zip Code format = ZZZZZ or ZZZZZ-ZZZZ. |
| County | Previous location County. |
| Site Contact Name | **Mandatory** Site Contact Name at the location where the work is to be completed. |
| Site Contact Telephone Number / Extension | **Mandatory** Site Contact Telephone Number / Extension. |
| Site Contact E-mail | **Mandatory** Site Contact E-mail address. |
| Site Contact Fax Number | Site Contact Fax Number. |
| Room Number | Site Contact Room Number. |
| Provide all Telephone, Fax, and Modem Numbers | Provide all Telephone, Fax and Modem numbers at the work location. Use the format: (NPA)-NXX-nnnn, where n = station code. |
| Type of Service<br>☐ Move<br>☐ Add<br>☐ Change<br>☐ Disconnect<br>☐ Inside Wiring Required<br>☐ Auth codes<br>☐ International Long Distance<br>☐ Toll Free (1-800)<br>☐ Integrated Voice Mail Service (IVMS)<br>☐ Auto Attendant<br>☐ Other | Please check the Type of Service requested. Check all services that apply.<br>NOTE: Long Distance including Canada is provisioned as the default. International Long Distance must be checked if it is requested.<br><br>If you need HELP, please call the following number and one of our analysts will be glad to assist you.<br><br>ITS Request Fulfillment    (919)-754-6700<br><br>You can find detailed Product and Service information on our Web site.<br><br>ITS Home Page Web Address:  http://www.its.nc.gov |
| Phone Type and Model Number<br>☐ Single Line Set<br>☐ Avaya<br>☐ Nortel/Meridian<br>☐ Nortel/Norstar<br>☐ Toshiba<br>☐ Other<br>☐ Other | Check all that apply.<br><br>If you need HELP, please call the following number and one of our analysts will be glad to assist you.<br><br>ITS Request Fulfillment    (919)-754-6700 |
| System<br>☐ Centrex<br>☐ Key System<br>☐ PBX | Check all that apply.<br><br>If you need HELP, please call the following number and one of our analysts will be glad to assist you.<br><br>ITS Request Fulfillment    (919)-754-6700 |

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| System - continued<br><br>☐ ITS EIPT<br>☐ ITS Managed PBX<br>☐ ITS IVR/Call Center<br>☐ Other | |
| Line Type<br><br>☐ Centrex Line<br>☐ Fax Line<br>☐ ISDN PRI<br>☐ Modem Line<br>☐ Voice Line<br>☐ Other | Check all that apply.<br><br>If you need HELP, please call the following number and one of our analysts will be glad to assist you.<br><br>ITS Request Fulfillment     (919)-754-6700 |
| Describe Service Request | Complete a separate TO-5 for each installation address.<br><br>Please provide as much detailed information as possible in order for your request to be handled promptly.  NOTE:  Site contact numbers are essential to processing your request.<br><br>Attach additional sheets if required.<br>If you need HELP, please call the following number and one of our analysts will be glad to assist you.<br><br>ITS Request Fulfillment     (919)-754-6700 |
| Budget or Fiscal Officer's Signature<br><br>☐  Signature on File (SOF)<br><br><br><br><br><br>Telephone<br><br>Date | **This field is mandatory**.  All service requests must be signed by an authorized Budget or Fiscal Officer <u>or</u> you must have a "Signature on File" before this service request can be processed.<br>**Check the Signature on File (SOF) box if you have an existing "Signature on File."**<br>Note: An agency can submit a "Signature on File" request in writing, using their agency letterhead, to authorize specific individuals to submit service requests on behalf of the agency.<br>The "Signature on File" allows an authorized individual to submit a service request without having to sign the request.  A "Signature on File" request must be signed by an agency Budget or Fiscal officer.<br>The Telephone number of the Budget Officer, the Fiscal Officer or the person that can authorize this service request.<br>The Date that this TO-5 Telephone Order Service Request authorization was signed by the Budget or Fiscal Officer. Format = mm/dd/yy. |

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