CONSULTANT AGREEMENT PURCHASE REQUISITION

PURPOSE: TO RECORD AND ENCUMBER FUNDS FOR A CONSULTANT AGREEMENT CONTRACT

REQUIRED ITEMS NEEDED PRIOR TO PROCESSING:

- 1. ACTIVE PEOPLESOFT SUPPLIER ID #
- 2. APPROVED CONSULTANT AGREEMENT CONTRACT
- 3. DETAILED SCOPE OF WORK AND PAYMENT PROVISIONS
- 4. COMPLETED AND SIGNED EVALUATION OF EMPLOYER-EMPLOYEE RELATIONSHIP FORM
- 5. BUDGET NUMBER AND AVAILABLE FUNDING

REQUIRED ATTACHMENT: CONSULTANT AGREEMENT CONTRACT, INCLUDING SCOPE OF WORK, SIGNED BY CONSULTANT AND DISTRICT PURCHASING SUPERVISOR

CHECK "AMOUNT ONLY" BOX: YES

PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES REQUESTER OR CAMPUS WITH INVOICE. INVOICE IS ELECTRONCIALLY ROUTED WITHIN PEOPLESOFT FOR APPROVAL. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER'S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

Note: The process for Lecture Agreements and Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

Log into PeopleSoft at <u>myportal.sdccd.edu</u> using your 10 digit Employee ID number as your User ID & enter the PeopleSoft password you created.

Click on Finance Dashboard

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Employee Dashboard	Finance Dashboard

Next, click on Procurement, then Create a Requisition.

	Finance Dashboard	â Q 🏲 ☰ Ø
Finance Dashboard		
Procurement	New HCM and Finance Portal!	Employee Quicklinks -
Create a Requisition	PeopleSoft Human Capital Management (HCM) has replaced the Colleague Human Resources system and includes our new myPortal page. Please click on Read More for	МУ РАУСНЕСКЯ
Manage Requisitions	more information and help. FINANCE menu options are now in the Finance Service Center - click on the MENU tab above the District logo and click the Finance Service Center link to expand the Finance Options.	ТМЕЗНЕЕТ
Add/Update Supplier	Read More	BENEFITS SUMMARY
Receive an Item		PERSONAL DETAILS
Request a Payment		FINANCE WORKLIST
Travel & Expense V		
Manager Self Service V		Training (How to) –
Reports ~		Benefits
Employee Dashboard		General HR Info
Finance Dashboard		Payroll & Compensation
		Personal Information
		Timesheet

To create a requisition, enter information on this page and it will auto populate into each line item of the requisition. Requisition Settings

quisition Settings						
Business Unit	MIR01	5	San Diego Miran	ar College	Bid No/Q	uote
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OK Cancel

The "Bid No/Quote" field should follow the naming convention "CONSULTANT AGRMT – VENDOR NAME". Click "Override".

Requisition Settings			
Business Unit	MIR01	San Diego Miramar College	Bid No/Quote CONSULTANT AGRMT - J COLLINS
*Requester	CDEMOLL	Carrie De Moll	Priority Medium V
*Currency	USD		
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Buyer	Q		
Click the Magnifying Gla Enter Supplier's Name.		Supplier ID JAMES C. COL Short Supplier Name JAMES C. COL Short Supplier Name City City Country Postal Code Select Cancel	LINS × Help Find Reset

Supplier's ID # and related information will pop up. Click on the circle to select vendor and click "Select".

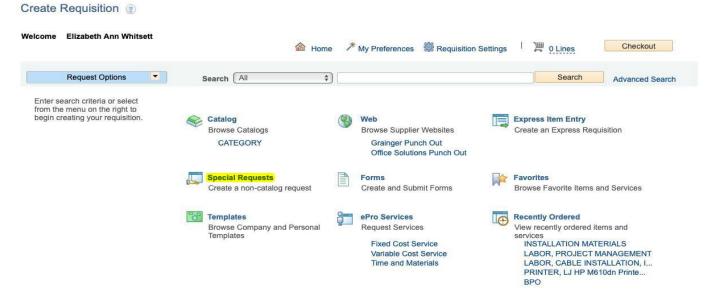
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Enter Category Code (918-38), Buyer (Maria Briney) and to whose attention this should go (typically the requester). Enter budget number (Fund, Dept, Product, Account). You should obtain this from your dean

or manager.

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To begin creating the requisition, click the "Special Requests" link.



Enter Item Description starting with "CONSULTANT AGREEMENT – SUPPLIER'S NAME". Add the amount of the Consultant Agreement and enter the quantity as "1". ". In the Additional Information box, enter the Consultant Agreement Language shown below. Click "Add to Cart".

All Request Options Web Office Solutions Punch Out Create Requisition Favorites Templates ePro Services Fixed Cost Service Time and Materials Create Requisition Create Requisition CONSULTANT AGREEMENT - JAMES C. COLLINS **Currency USD **Currency	me Carrie De Moll			🏠 Home	* My Preferences	Requisition	Settings I	🗏 0 Lines	Checkout
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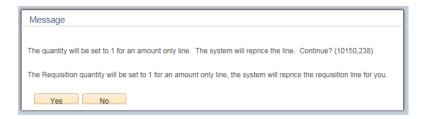
On the next page, click "Checkout".

Create	Requisition (2)						
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On the Checkout page, attach the district-signed Consultant Agreement under Comments

Checkout - Review and Sub	mit					
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When the following message appears, click "Yes".



Review all your information carefully. Click "Save for Later", which will create a Requisition ID number. If everything appears correctly, click "Check Budget".

Edit Requisition - Review	v and Submit									
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When the "Budget Checking Status" changes from "Not Checked" to "Valid", proceed by clicking the "Save and Submit" button. This will start the approval process.

Check Budget	Pre-Check Budget	Budget Checking Status: Valid	
Save & submit	Save for Later	Add More Items	60 Preview Approvals

NOTE: If the check should be delivered to someone other than the supplier, complete a Special Handling Form and email it to <u>APspecialhandling@sdccd.edu</u>.