

## **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. CERTIFICATE OF INSURANCE, WHEN APPLICABLE
6. BUDGET NUMBER AND AVAILABLE FUNDING

**REQUIRED ATTACHMENT:** CONSULTANT AGREEMENT CONTRACT, INCLUDING SCOPE OF WORK, SIGNED BY CONSULTANT, CAMPUS CONTACT AND DISTRICT PURCHASING MANAGER

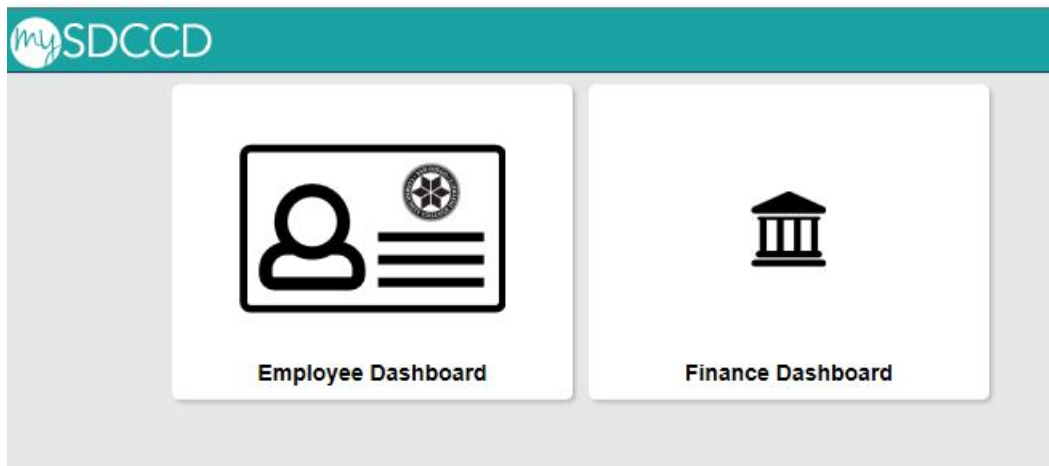
**CHECK “AMOUNT ONLY” BOX:** YES

**PAYMENT PROCESS TO SUPPLIER:** SUPPLIER PROVIDES REQUESTER OR CAMPUS WITH INVOICE. THE REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE - [apinvoice@sdccd.edu](mailto:apinvoice@sdccd.edu). BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTERS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

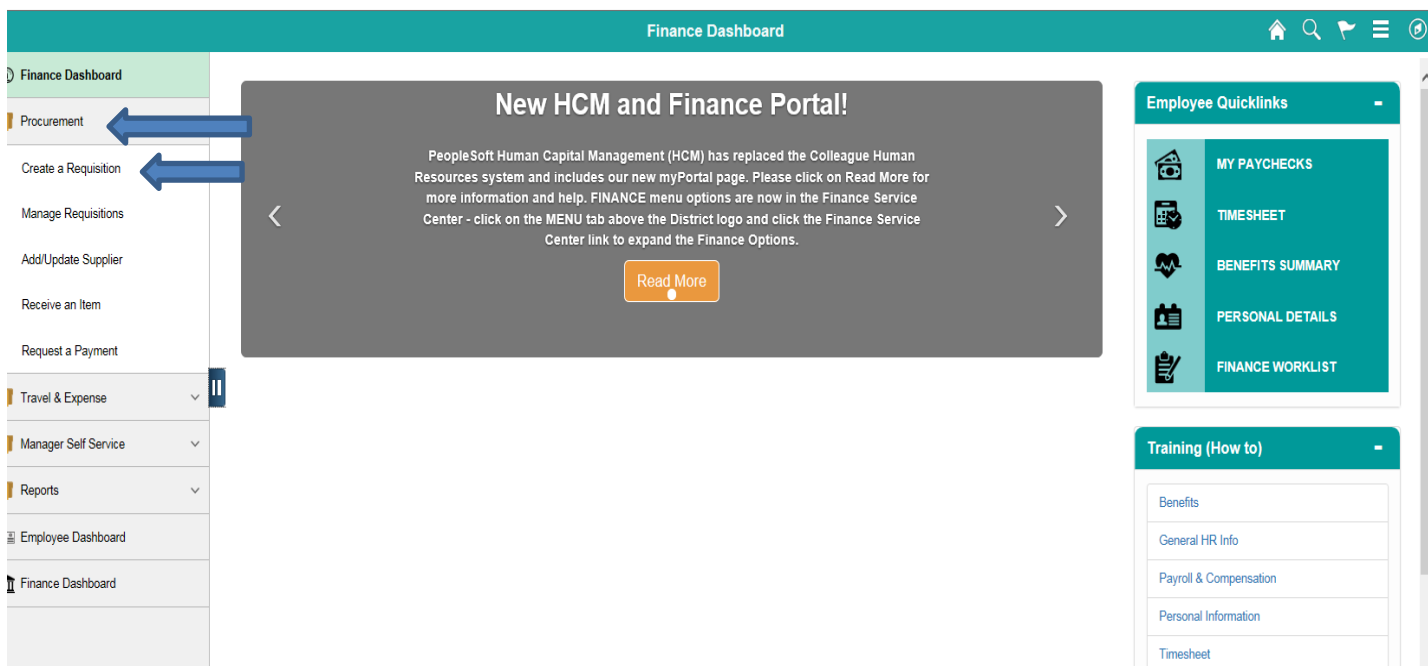
*Note: The process for Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.*

Log into PeopleSoft at [myportal.sdccd.edu](http://myportal.sdccd.edu) using your 10 digit Employee ID number as your Username & Password.

Click on Finance Dashboard



Next, click on Procurement, then Create a Requisition.



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

Requisition Settings

Business Unit  San Diego Miramar College Bid No/Quote

\*Requester  Carrie De Moll Priority

\*Currency

**Default Options** ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults** ?

Supplier  Category

Supplier Location  Unit of Measure

Buyer

**Shipping Defaults**

Ship To  Attention

Due Date

**Distribution Defaults**

SpeedChart

**Accounting Defaults** Personalize | Find |  |  First 1 of 1 Last

Chartfields1

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account
1	<input type="text"/>	<input type="text" value="MIR"/>	<input type="text" value="MIR01"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

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

Requisition Settings

Business Unit  San Diego Miramar College Bid No/Quote

\*Requester  Carrie De Moll Priority

\*Currency

**Default Options** ?

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Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults** ?

**Note:** The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier  Category

Supplier Location  Unit of Measure

Buyer

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country  State

Postal Code

Find Reset

Enter search criteria to find a supplier.

Select Cancel

Click the Magnifying Glass for Supplier Enter Supplier's Name. Click Find.

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

Supplier Search Help

Supplier ID    
 Name JAMES C. COLLINS   
 Short Supplier Name   
 Alternate Supp Name   
 City   
 Country   State   
 Postal Code

**Search Results** Personalize | Find | View All |  |  First 1 of 1 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input checked="" type="radio"/>	1 0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER PEAK RD	16203 SPANGLER PEAK RD	RAMONA	CA	<input type="button" value="📄"/>

Enter Category Code (918-38)

Buyer field should be blank

Attention field should be the Requester

Enter budget number (Fund, Dept, Product, Account). You should obtain this from your Dean or Manager.

Click OK.

Requisition Settings

Business Unit   San Diego Miramar College Bid No/Quote   
 \*Requester   Carrie De Moll Priority    
 \*Currency

**Default Options**  Default  Override

If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

**Note:** The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier   Category   918-38 is the Category Code for all Consultant Agreements

Supplier Location   Unit of Measure

Buyer   Buyer field should be blank

Shipping Defaults

Ship To    
 Due Date   Attention

Distribution Defaults

SpeedChart

**Accounting Defaults** Personalize | Find |  |  First 1 of 1 Last

Chartfields1

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	
1		MIR	MIR01					<input type="button" value="🔍"/> <input type="button" value="🔍"/>

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

Create Requisition ?

Welcome Elizabeth Ann Whitsett

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**  
Browse Catalogs  
CATEGORY
- Web**  
Browse Supplier Websites  
Grainger Punch Out  
Office Solutions Punch Out
- Express Item Entry**  
Create an Express Requisition
- Special Requests**  
Create a non-catalog request
- Forms**  
Create and Submit Forms
- Favorites**  
Browse Favorite Items and Services
- Templates**  
Browse Company and Personal Templates
- ePro Services**  
Request Services  
Fixed Cost Service  
Variable Cost Service  
Time and Materials
- Recently Ordered**  
View recently ordered items and services  
INSTALLATION MATERIALS  
LABOR, PROJECT MANAGEMENT  
LABOR, CABLE INSTALLATION, I...  
PRINTER, LJ HP M610dn Printe...  
BPO

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".

Create Requisition ?

Welcome Carrie De Moll

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

**Create Requisition ?**  
Enter information about the non-catalog item you would like to order:

**Item Details**

\*Item Description: CONSULTANT AGREEMENT - JAMES C. COLLINS  
\*Price: 5000.00 \*Currency: USD  
\*Quantity: 1 \*Unit of Measure: EA  
\*Category: 918-38 Due Date: [ ]

**Supplier**

Supplier ID: 0000590433  
Supplier Name: JAMES C. COLLINS  
Supplier Item ID: [ ]

**Manufacturer**

Mfg ID: [ ]  
Manufacturer: [ ]  
Mfg Item ID: [ ]

**Additional Information**

CONSULTANT SERVICES TO DESCRIBE SERRVICES FOR CAMPUS/DEPT/PROGRAM  
EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX  
CONTACT PERSON: NAME/PHONF AND/OR FMAIL

Send to Supplier  Show at Receipt  Show at Voucher

**Request New Item**

Request New Item A notification will be sent to a buyer regarding this new item request.

**Add to Cart**

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM  
EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX  
CONTACT PERSON: NAME/PHONE/AND/OR EMAIL  
SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

Highlighted areas require you to provide specific information for each agreement.

On the next page, click "Checkout".

## Create Requisition ?

Welcome Carrie De Moll



Checkout

Request Options

Search All

Search

Advanced Search

On the Checkout page, attach the district-signed Consultant Agreement under Comments

### Checkout - Review and Submit

Review the Item Information and submit the req for approval.



My Preferences



Requisition Settings

#### Requisition Summary

Business Unit

San Diego Miramar College

Bid No/Quote

\*Requester

Carrie De Moll

Priority

\*Currency

Cart Summary: Total Amount 5,000.00 USD

Expand lines to review shipping and accounting details

Add More Items

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	CONSULTANT AGREEMENT - JAMES C		JAMES C. COLLINS	1	EACH	5000.00	5000.00			

Select All / Deselect All    Select lines to:    Add to Favorites    Add to Template(s)    Delete Selected    Mass Change

Total Amount 5,000.00 USD

Click Icon under Details to select Amount Only

#### Shipping Summary

Edit for All Lines

Ship To Location: MIR  
Address: 10440 Black Mountain Road, San Diego, CA 92126-2999  
Attention To: CARRIE DE MOLL  
Comments:

#### Requisition Comments and Attachments

Enter requisition comments

Send to Supplier     Show at Receipt     Shown at Voucher

#### Approval Justification

Enter approval justification for this requisition

Check Budget

Pre-Check Budget

Save & submit

Save for Later

Add More Items

Preview Approval

#### Line Details

Line 1: CONSULTANT AGREEMENT - JAMES C

Item Details:  
Merchandise Amount: 5000.00 USD  
Item ID: 910-00  
Category: 910-00  
Original Substituted Item Description: [blank]  
Physical Nature: Goods  
Buyer: KRODASAS  
Buyer Information: [blank]  
Configuration Info: [blank]

Contract Information:  
 Use Contract if Available  
Contract ID: [blank]  
Contract Details:  
Version: [blank]  
Contract Line: [blank]  
Category Line: [blank]

Supplier Information:  
Supplier ID: 000050433 (JAMES C. COLLINS)  
Supplier Location: SAN (18200 SPANGLER PEAK RD)  
Supplier Item ID: [blank]  
Supplier's Catalog: [blank]

Manufacturer Information:  
Manufacturer ID: [blank]  
Manufacturer: [blank]  
Manufacturer's Item ID: [blank]  
C19N

Sourcing Controls:  
 Consolidate with other Req  
 Calculate Price  
 Override Suggested Supplier

Amount Only

Click OK

OK Cancel

When the following message appears, click “Yes”.

Message

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)

The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

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 and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

#### Requisition Summary

Business Unit:  San Diego Miramar College Bid No/Quote:   
Requester:  Carrie De Moll Requisition ID:   
\*Currency:  Priority:

Cart Summary: Total Amount 5,000.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	CONSULTANT AGREEMENT - JAMES C		JAMES C. COLLINS	1	EACH	5000.00	5000.00			

Select All / Deselect All      Select lines to:      [Add to Favorites](#)      [Add to Template\(s\)](#)      [Delete Selected](#)      [Mass Change](#)

Total Amount      5,000.00 USD

#### Shipping Summary

[Edit for All Lines](#)

Ship To Location: MIR  
Address: 10440 Black Mountain Road  
San Diego, CA 92128-2999  
Attention To: CARRIE DE MOLL  
Comments:

#### Requisition Comments and Attachments

Enter requisition comments

CONSULTANT SERVICES TO POLICE ACADEMY FOR MIR/PUBLIC SAFETY/OIS/MIRAMAR ( EFFECTIVE DATES: 7/1/18 TO 8/30/19 CAMPUS CONTACT PERSON: (name, phone #, room #) SCOPE OF WORK/CONSULTANT AGREEMENT ATTACHED

Send to Supplier       Show at Receipt       Shown at Voucher

[Add more Comments and Attachments](#)

#### Approval Justification

Enter approval justification for this requisition

[Check Budget](#)      [Pre-Check Budget](#)      Budget Checking Status: **Not Checked**

[Save & submit](#)      [Save for Later](#)      [Add More Items](#)      [Preview Approvals](#)

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](#)      [Preview Approvals](#)

**NOTE:** If the check should be delivered to someone other than the supplier, refer to the [Process Guide for Special Handling Request Form](#).