#### 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. 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 <u>myportal.sdccd.edu</u> using your 10 digit Employee ID number as your Username & Password.

**Click on Finance Dashboard** 

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Employee Dashboard	Finance Dashboard

Next, click on Procurement, then Create a Requisition.

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Procurement Create a Requisition Manage Requisitions Add/Update Supplier Receive an Item Request a Payment Travel & Expense	Image: Second	Employee Quicklinks     -       Imployee Quicklinks     -
Manager Self Service V	•	Training (How to) –
Reports ✓		Benefits General HR Info
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## To create a requisition, enter information on this page and it will auto populate into each line item of the requisition. Requisition Settings

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#### OK Cancel

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

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#### 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)

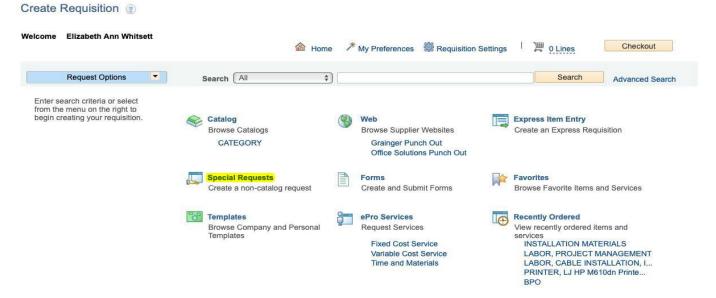
### Buyer field should be blank

#### Attention field should be the Requester

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

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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".

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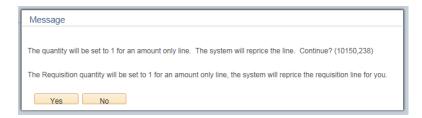
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### On the Checkout page, attach the district-signed Consultant Agreement under Comments

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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".

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