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. REQUEST FOR CONTRACT (RFC)
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: REQUEST FOR CONTRACT FORM, SCOPE OF WORK AND PAYMENT PROVISIONS AND COMPLETED AND SIGNED EVALUATION OF EMPLOYER-EMPLOYEE RELATIONSHIP FORM.

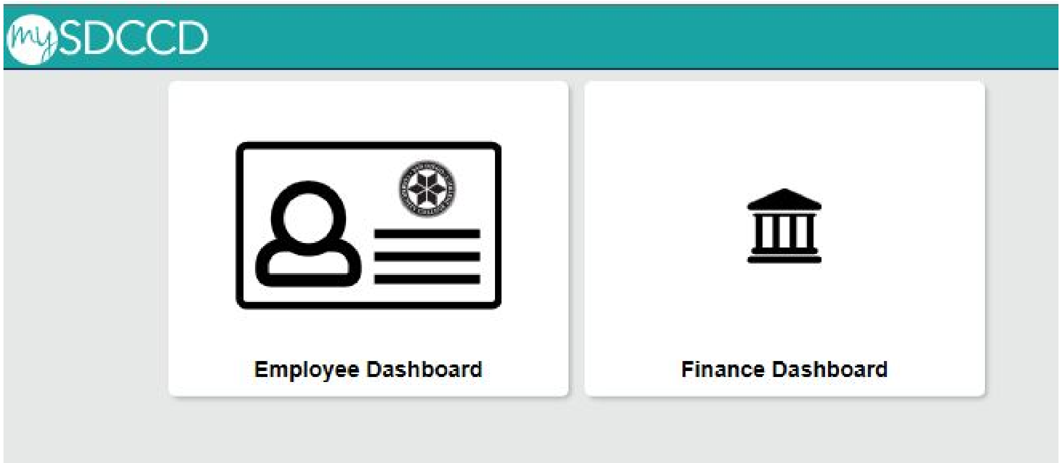
CHECK "AMOUNT ONLY" BOX: YES

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.

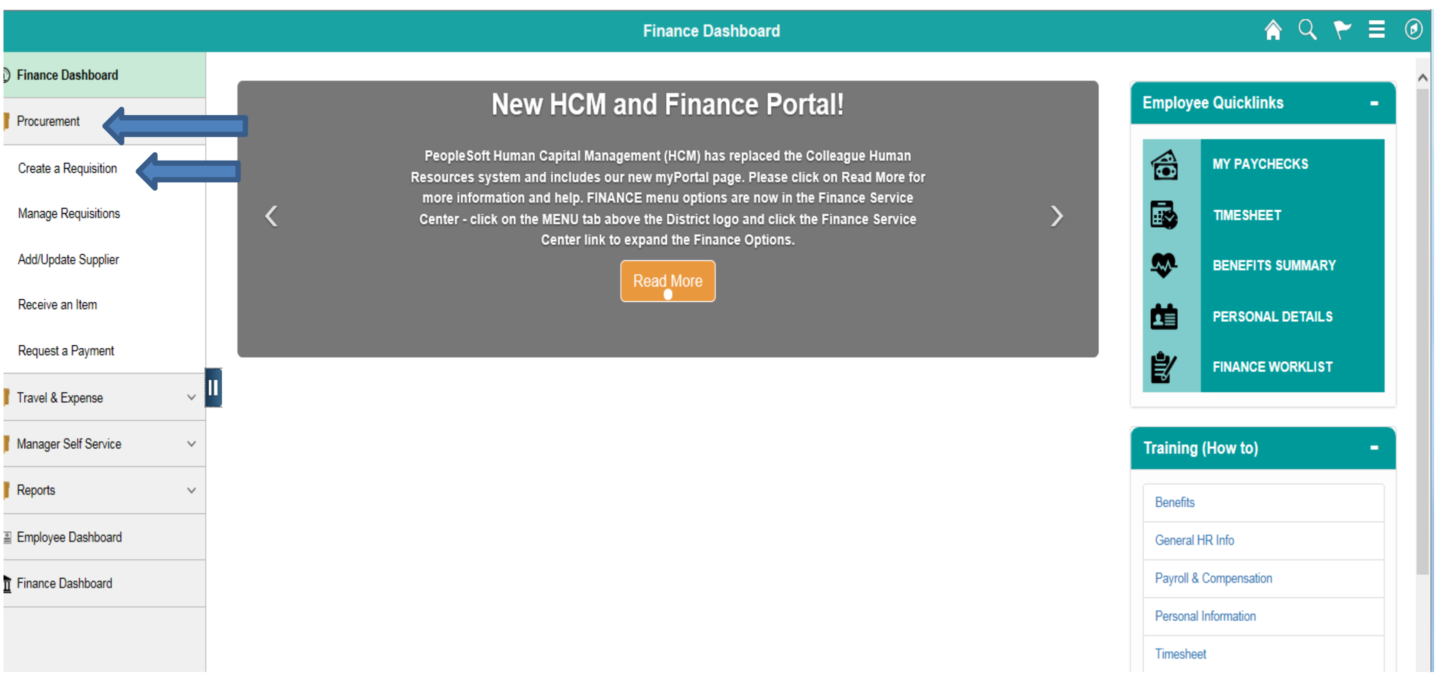
Note: The process for Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

Log into PeopleSoft at myportal.sdccd.edu using your 10 digit Employee ID number as your Username & Password.

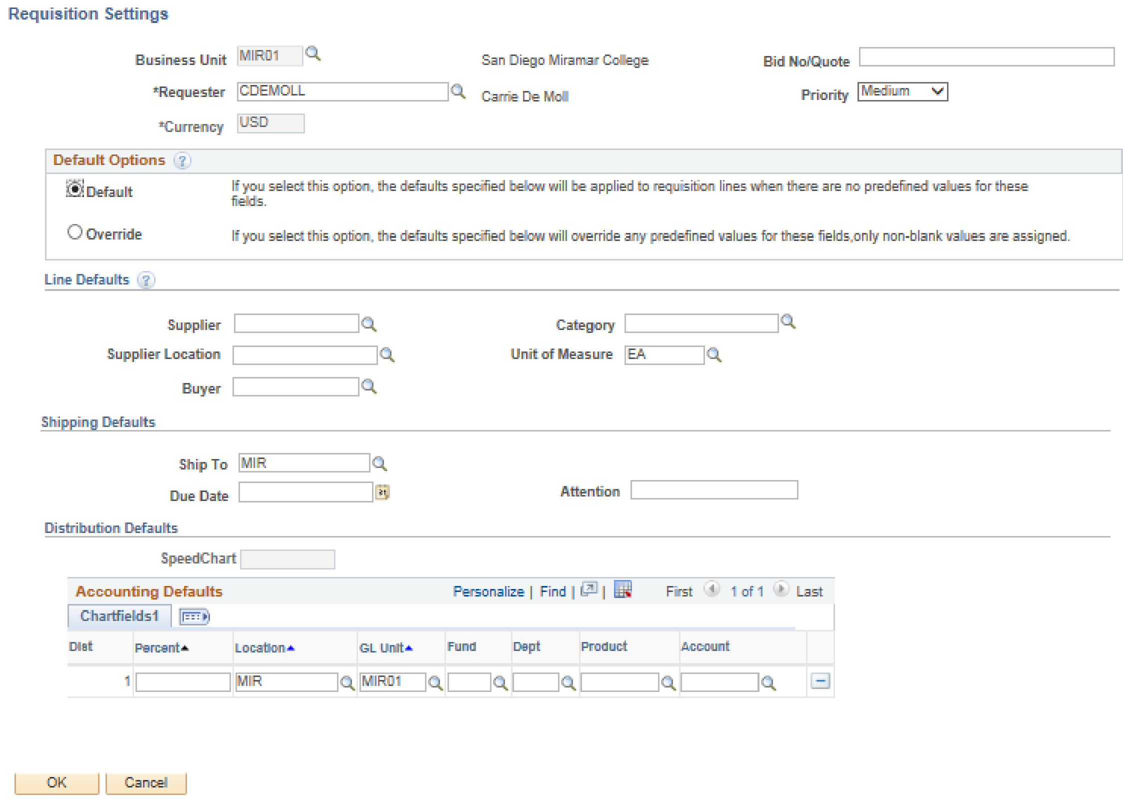
Click on Finance Dashboard



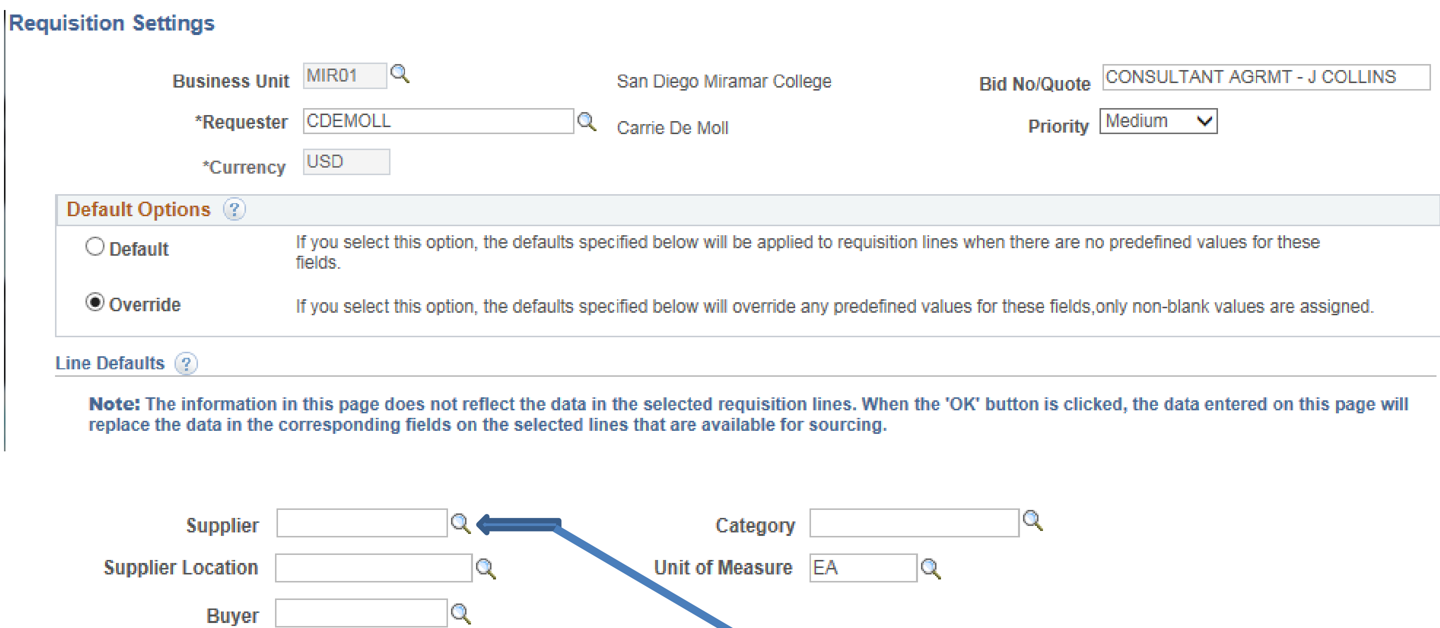
Next, click on Procurement, then Create a Requisition.



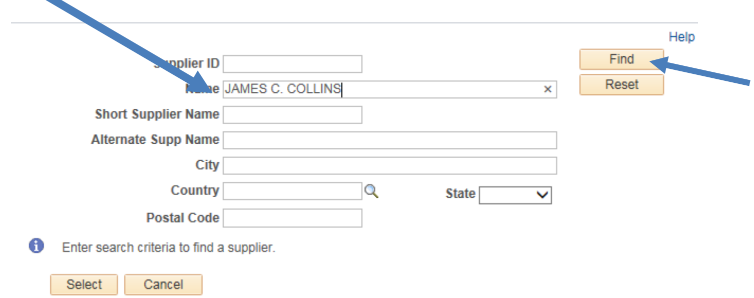
To create a requisition, enter information on this page and it will auto populate into each line item of the requisition.



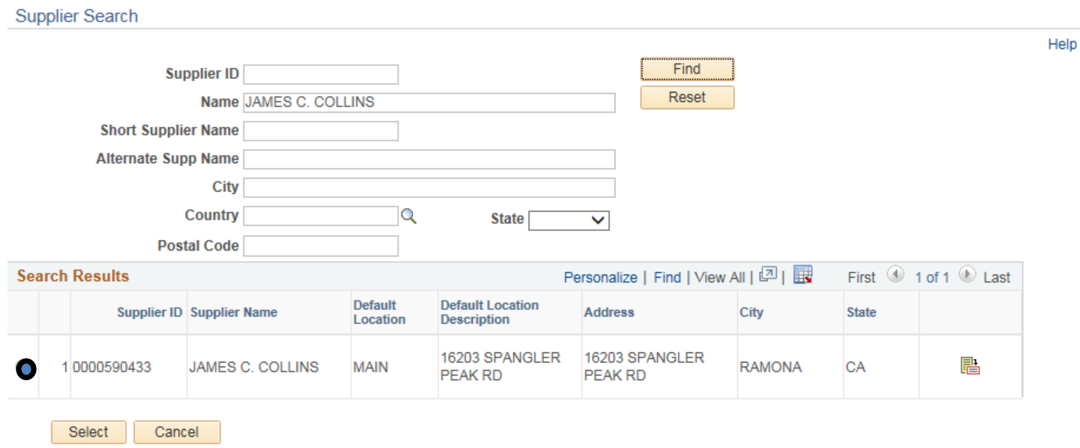
The "Bid No/Quote" field should follow the naming convention "CONSULTANT AGRMT – VENDOR NAME". Click "Override".



Click the Magnifying Glass Icon 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".



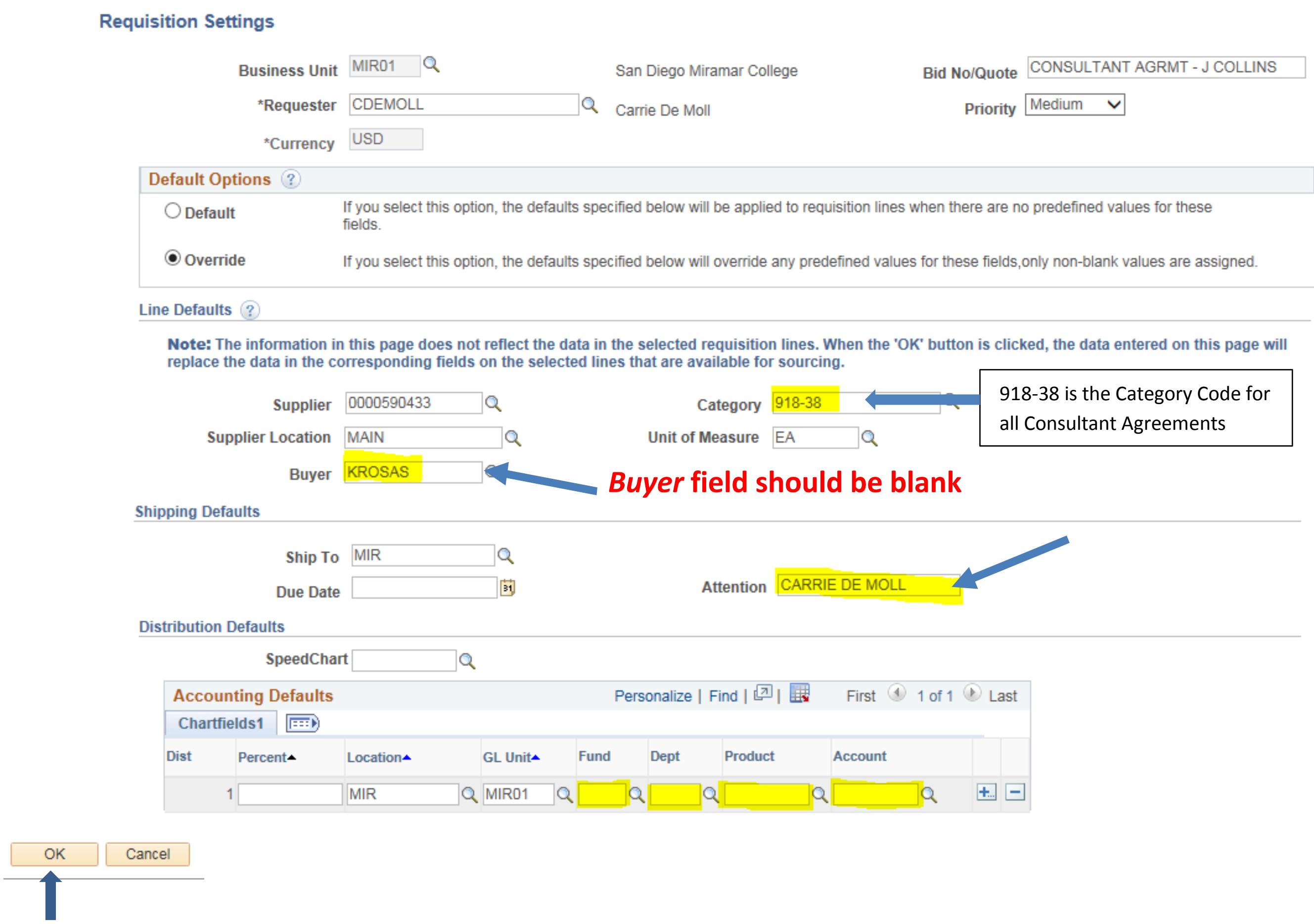
Enter Category Code (918-38)

Buyer field should be blank

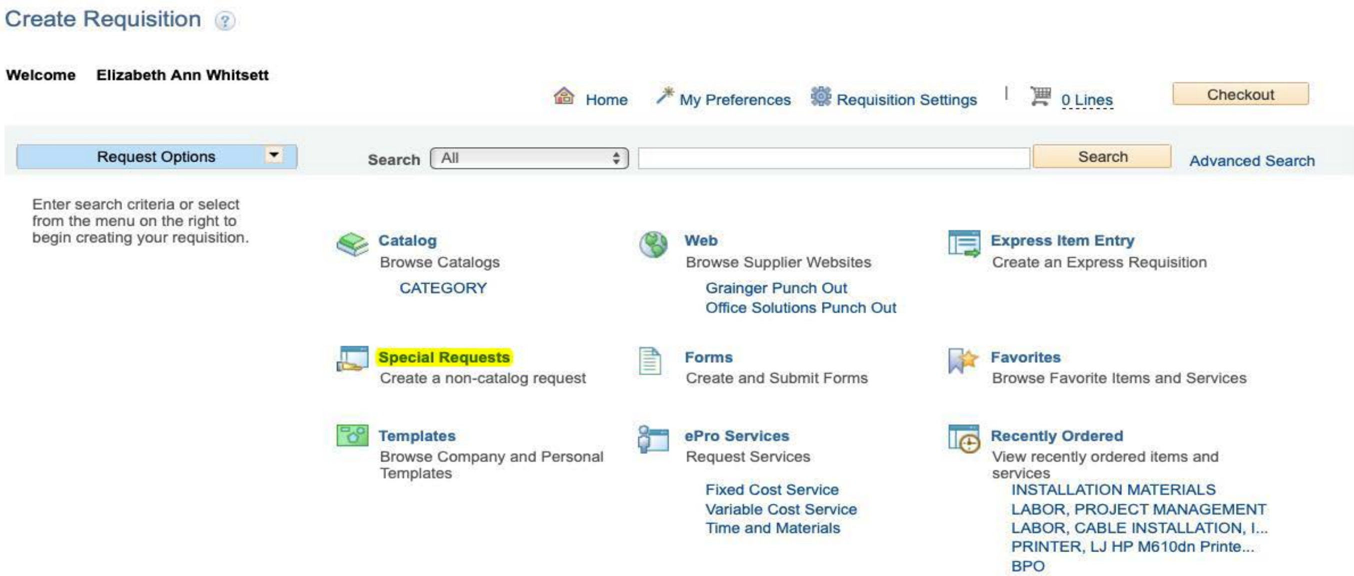
Attention field should be the Requester

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

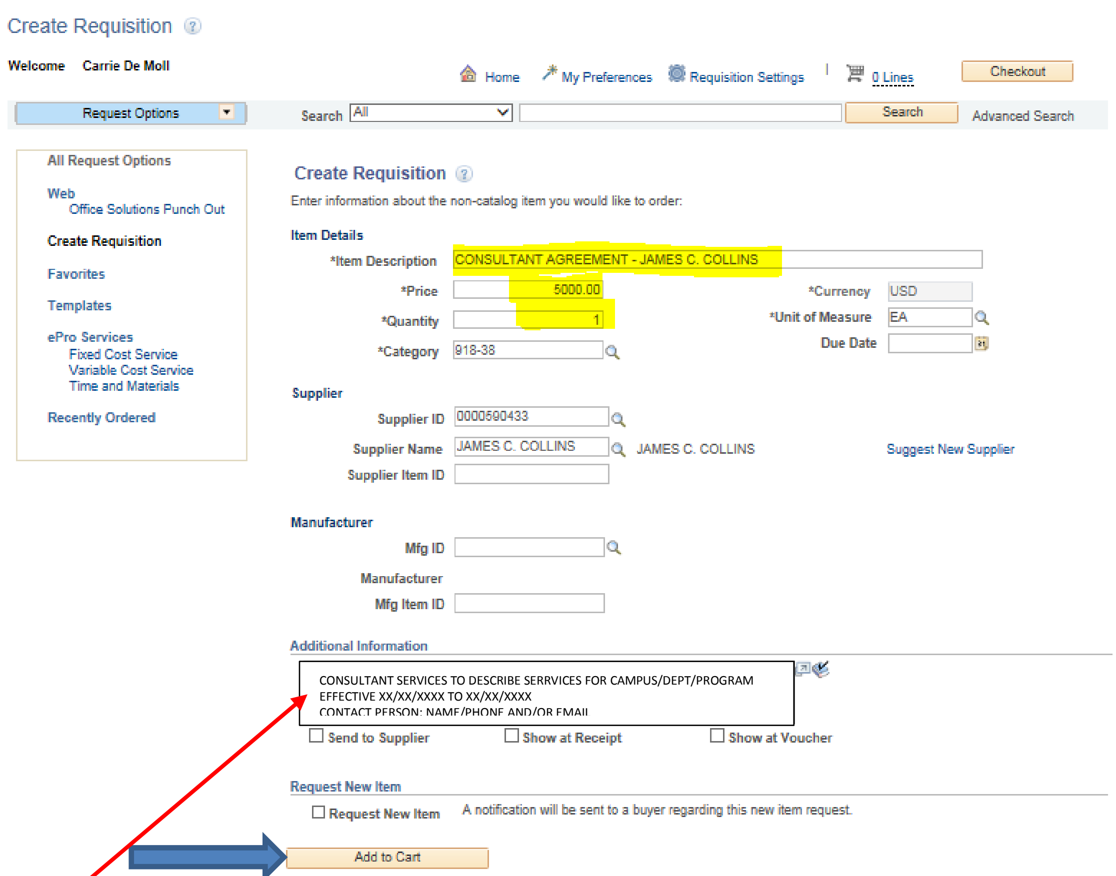
Click OK.



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



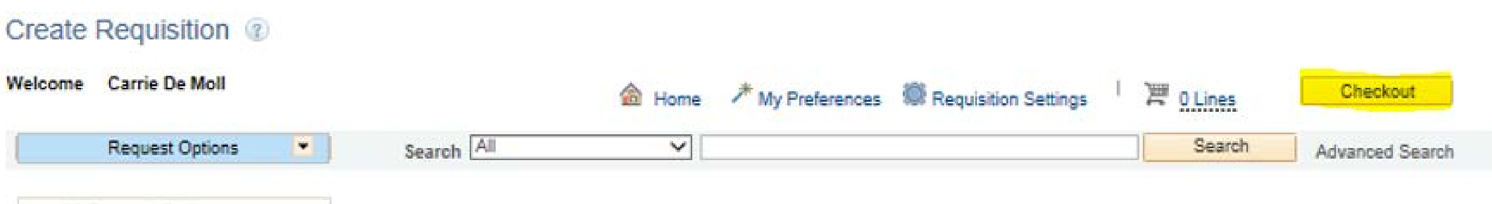
Enter Item Description starting with "CONSULTANT AGREEMENT – SUPPLIER'S NAME". Add the amount of the Consultant Agreement and enter the quantity as "1". ". In the Additional Information box, enter the Consultant Agreement Language shown below. Click "Add to Cart".



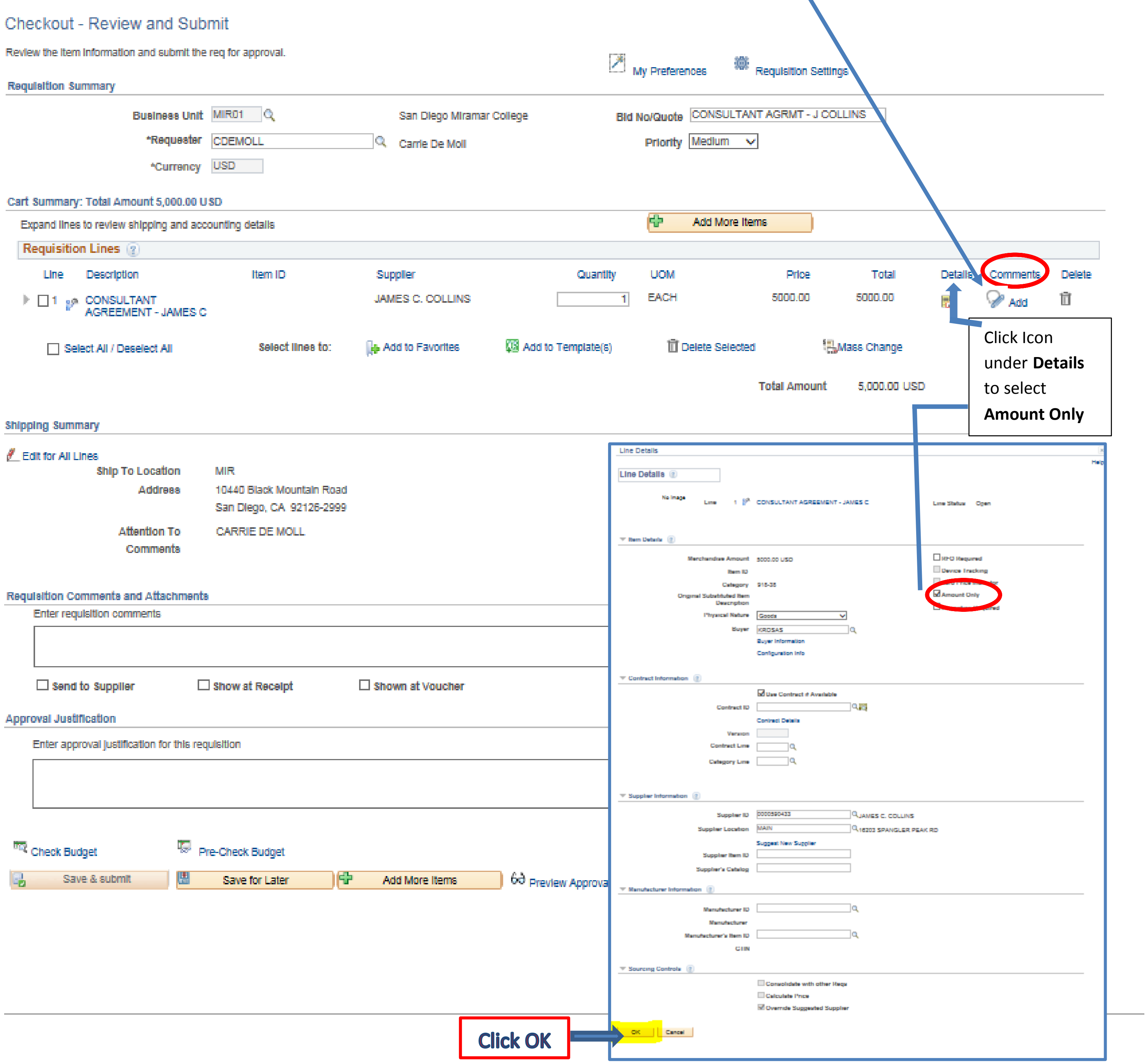
PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM
EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX
CONTACT PERSON: NAME/PHONE/AND/OR EMAIL
SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

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

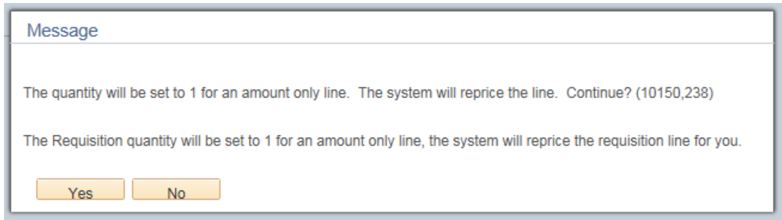
On the next page, click "Checkout".



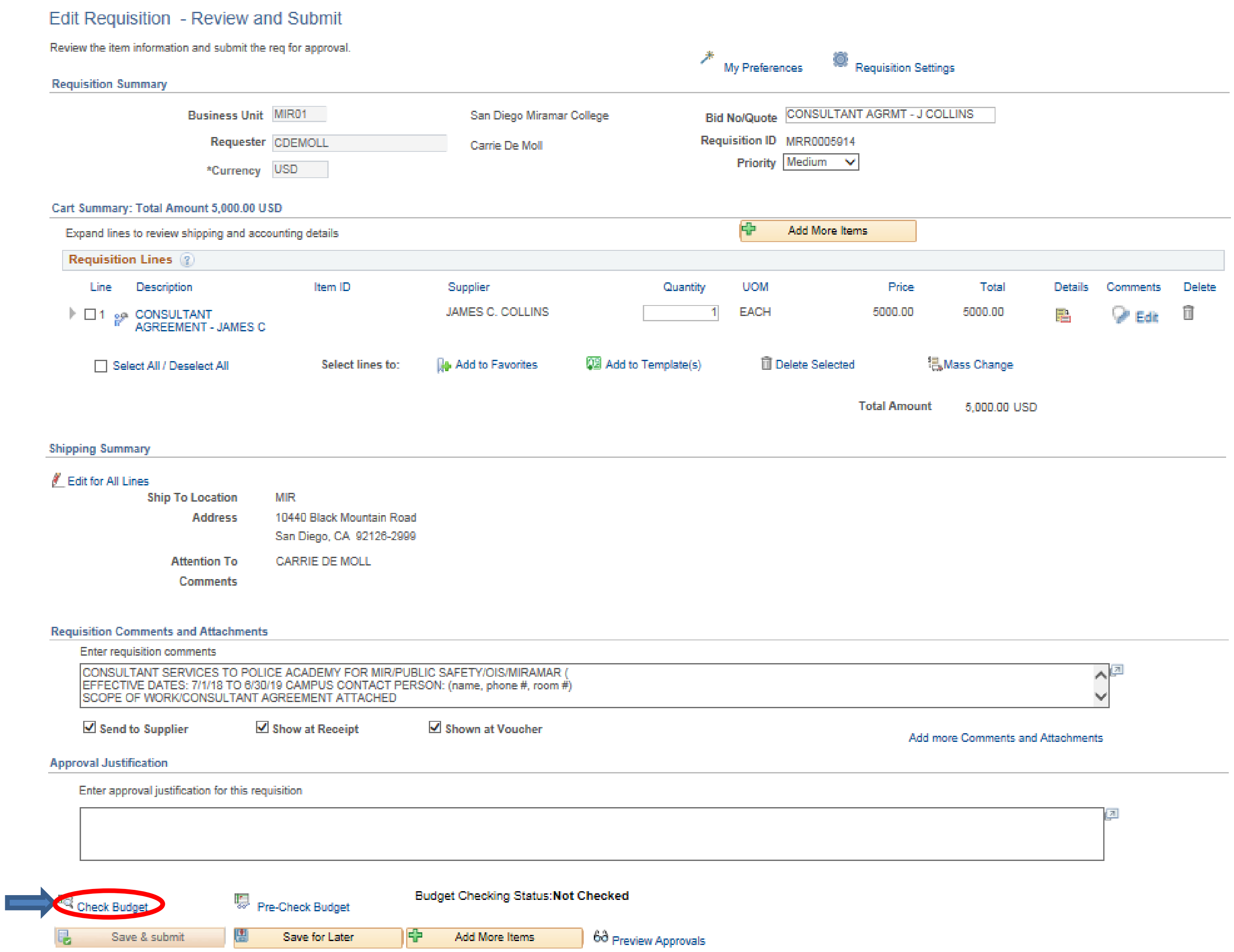
On the Checkout page, attach the district-signed Consultant Agreement under Comments



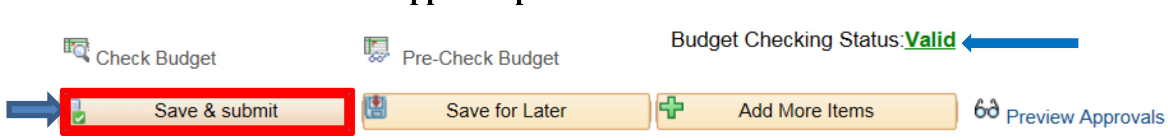
When the following message appears, click "Yes".



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



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.



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