PERFORMANCE AGREEMENT PURCHASE REQUISITION

PURPOSE: TO RECORD AND ENCUMBER FUNDS FOR A PERFORMANCE AGREEMENT

CONTRACT **REQUIRED DOCUMENTATION & PREAPPROVALS:**

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. REQUEST FOR CONTRACT FORM (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.

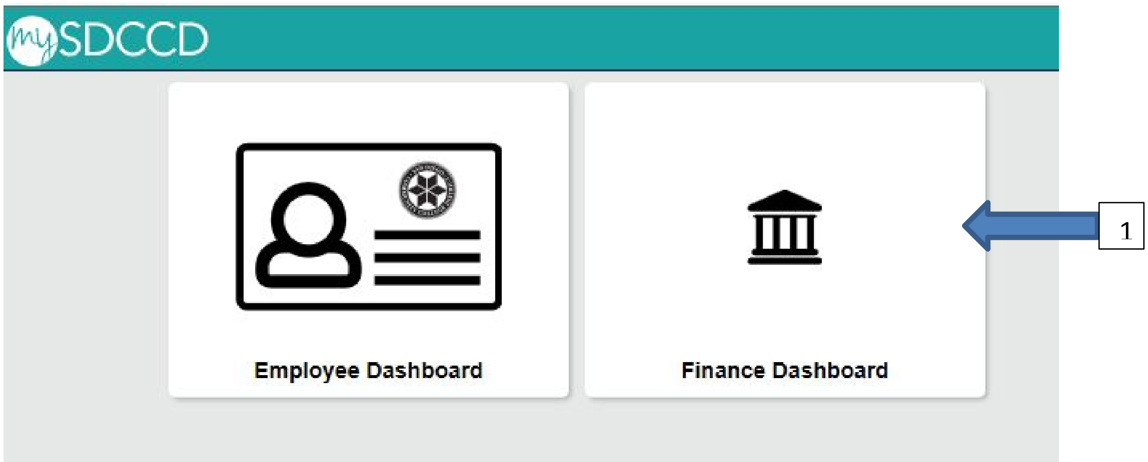
CHECK "AMOUNT ONLY" BOX: YES

PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE 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. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

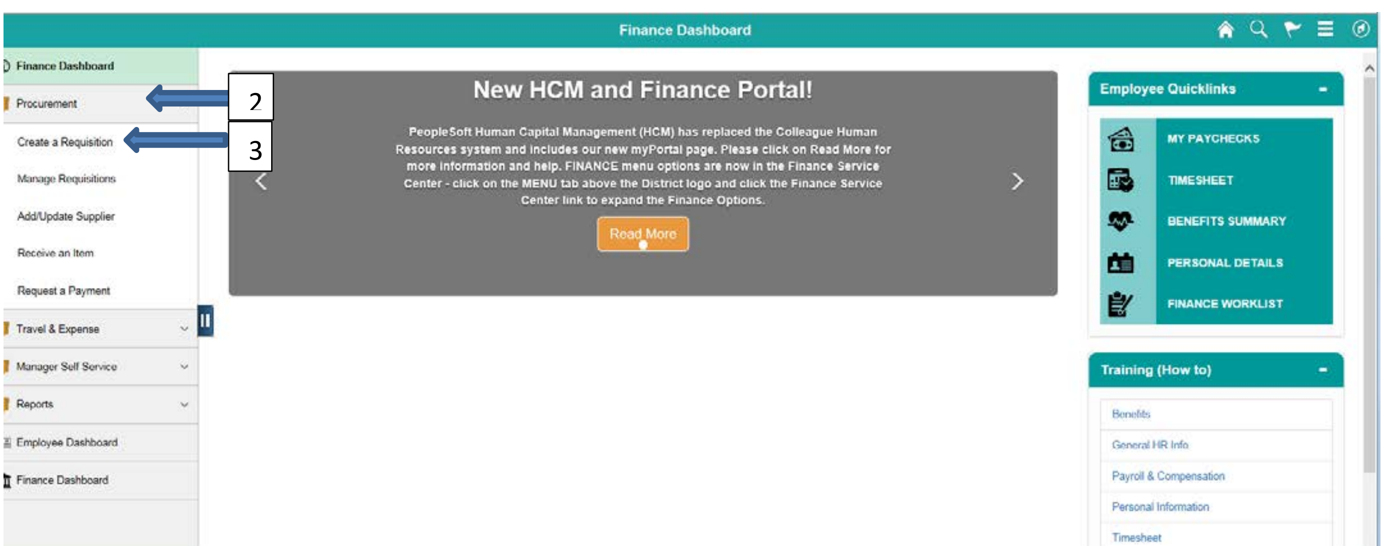
Note: The process for Performance Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

PERFORMANCE AGREEMENT REQUISITION

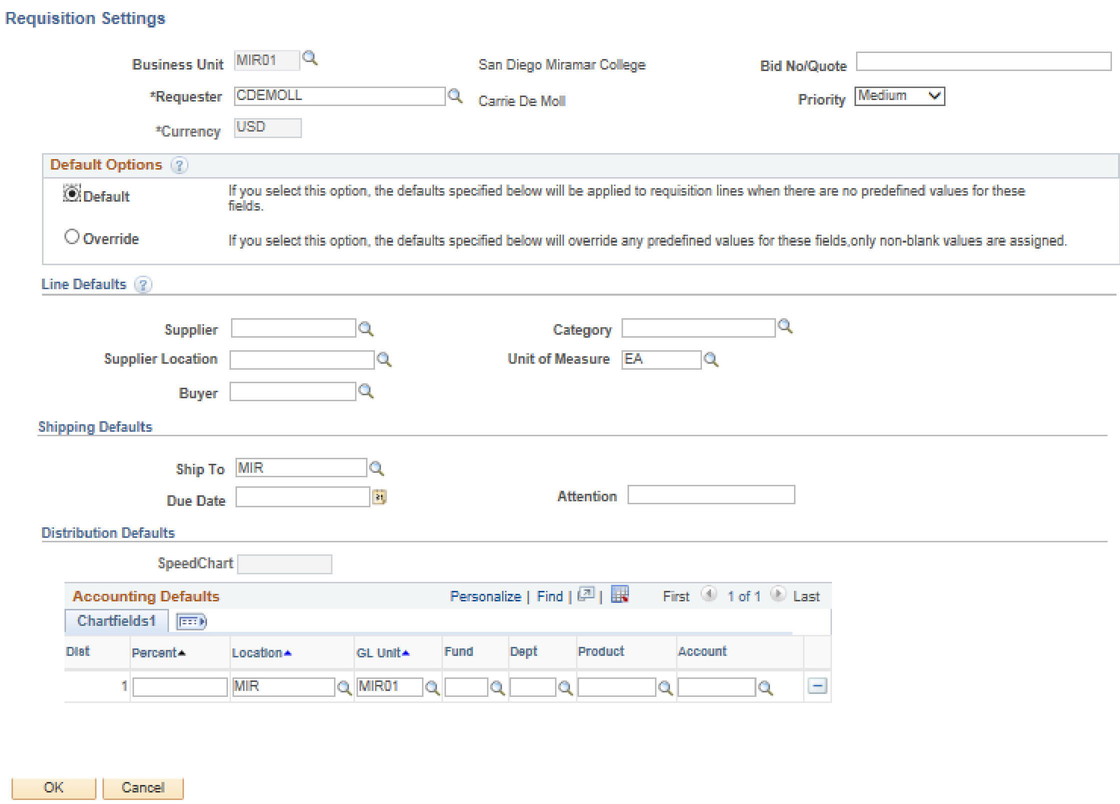
Log into PeopleSoft at myportal.sdccd.edu using your 10 digit Employee ID number as your Username and Password. Select the Finance Dashboard.



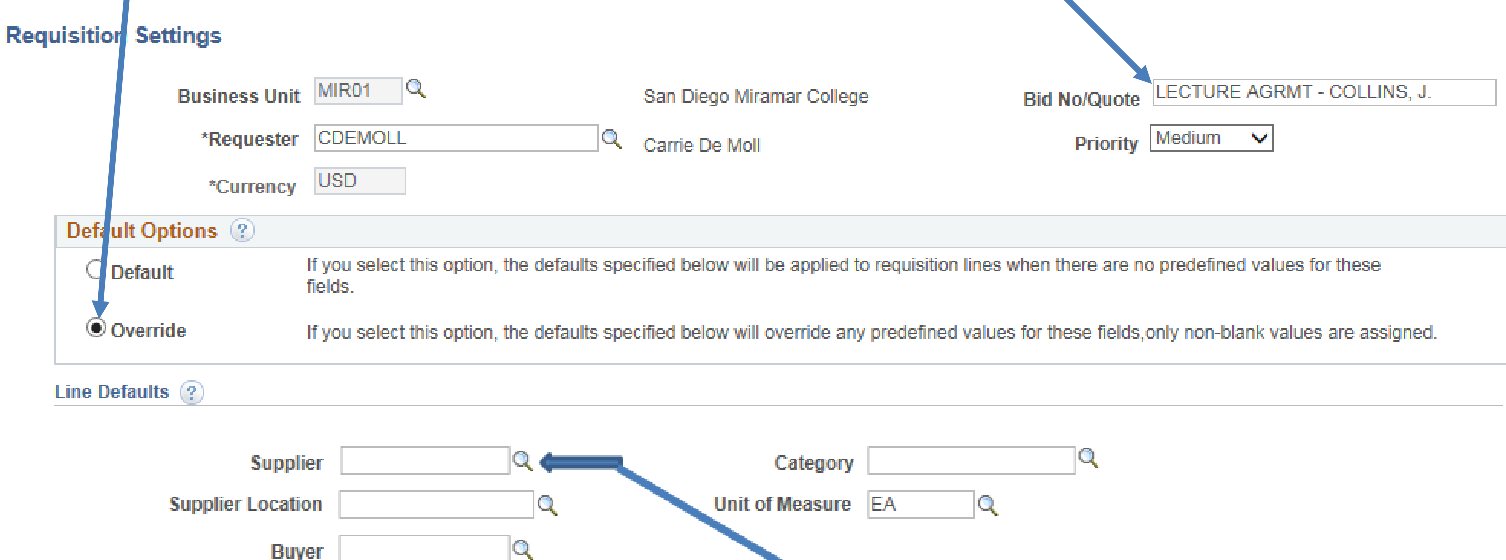
Next, navigate to *Procurement/Create a Requisition*.



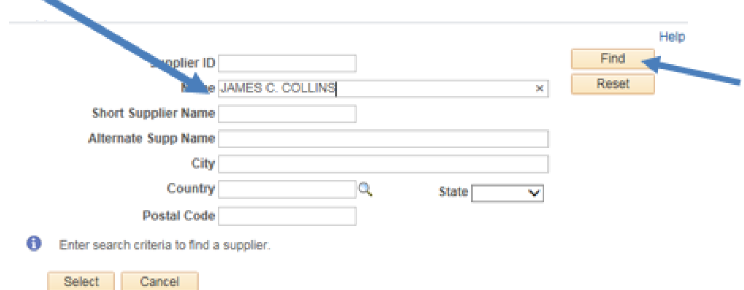
This is the *Requisition Settings* page. When creating a requisition, enter info on this page and it will auto populate into each line item of the requisition.



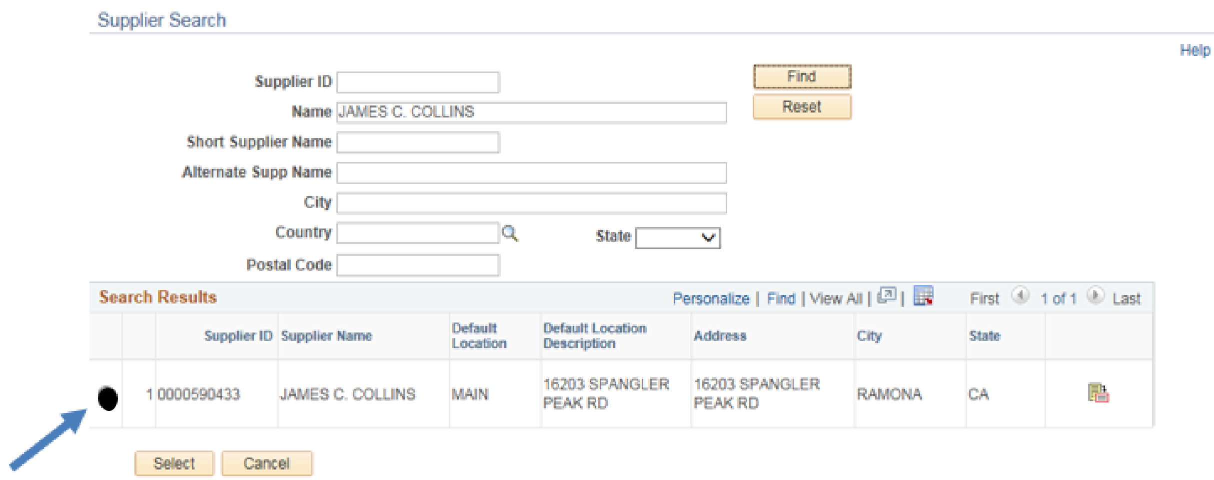
The "Bid No/Quote" field should follow the naming convention "PERFORMANCE AGRMT – VENDOR NAME". In the Default Options box, change the status from *Default* to *Override*.



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".



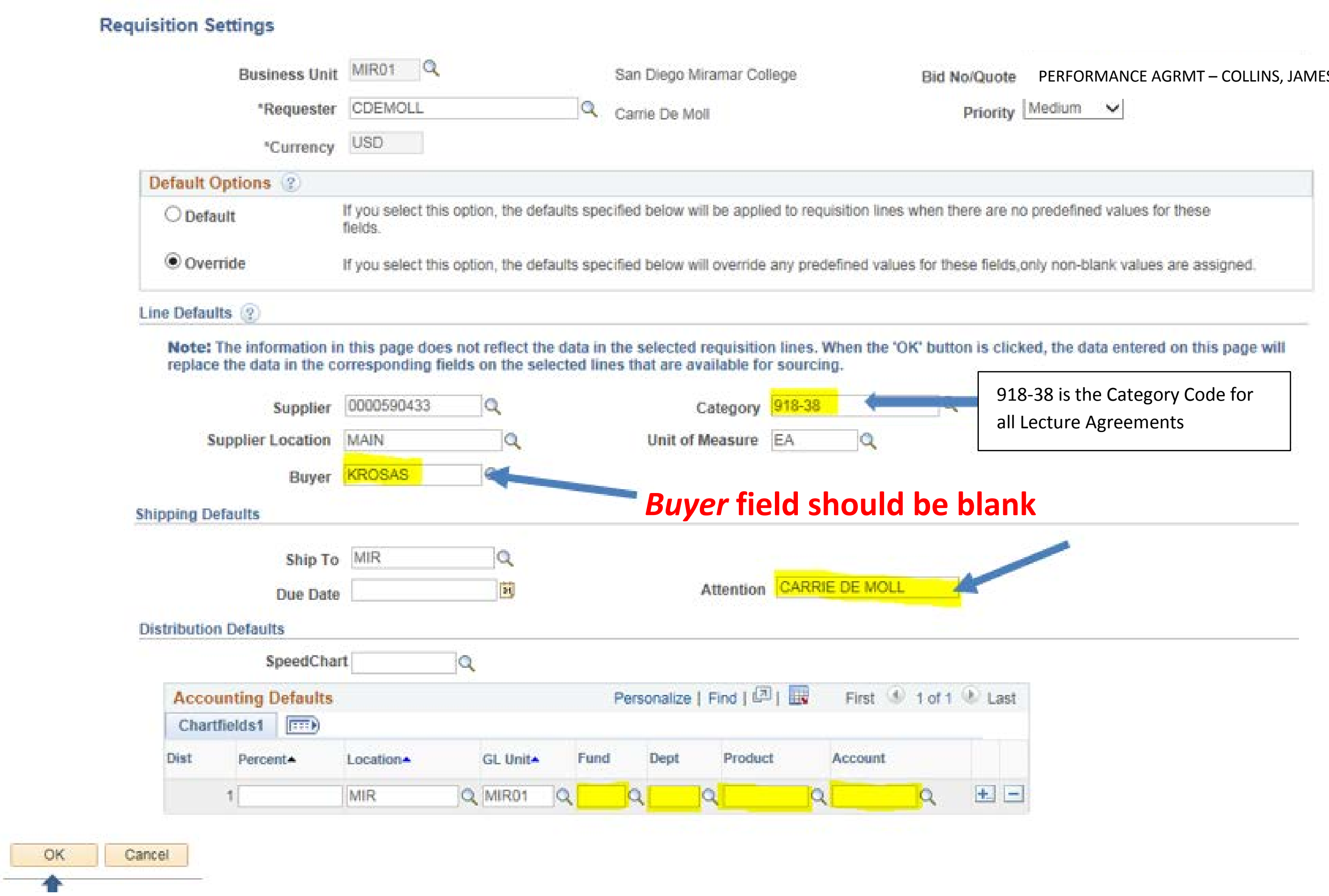
Enter Category Code (918-38)

Buyer field should be blank

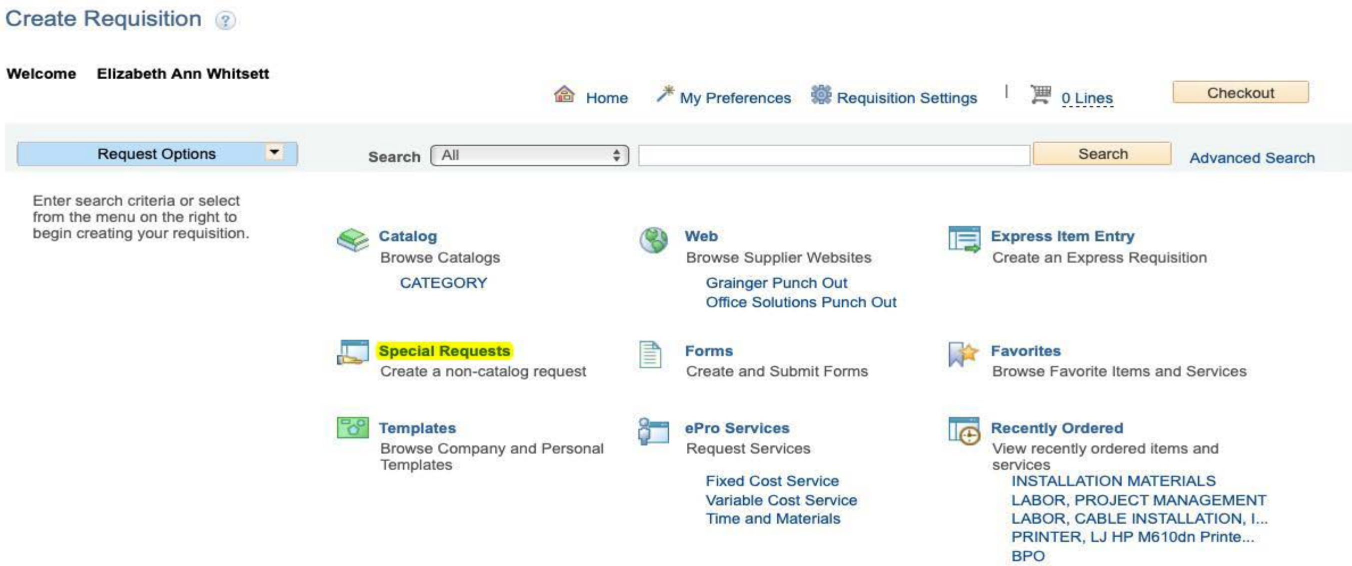
Attention field should be the Requester

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

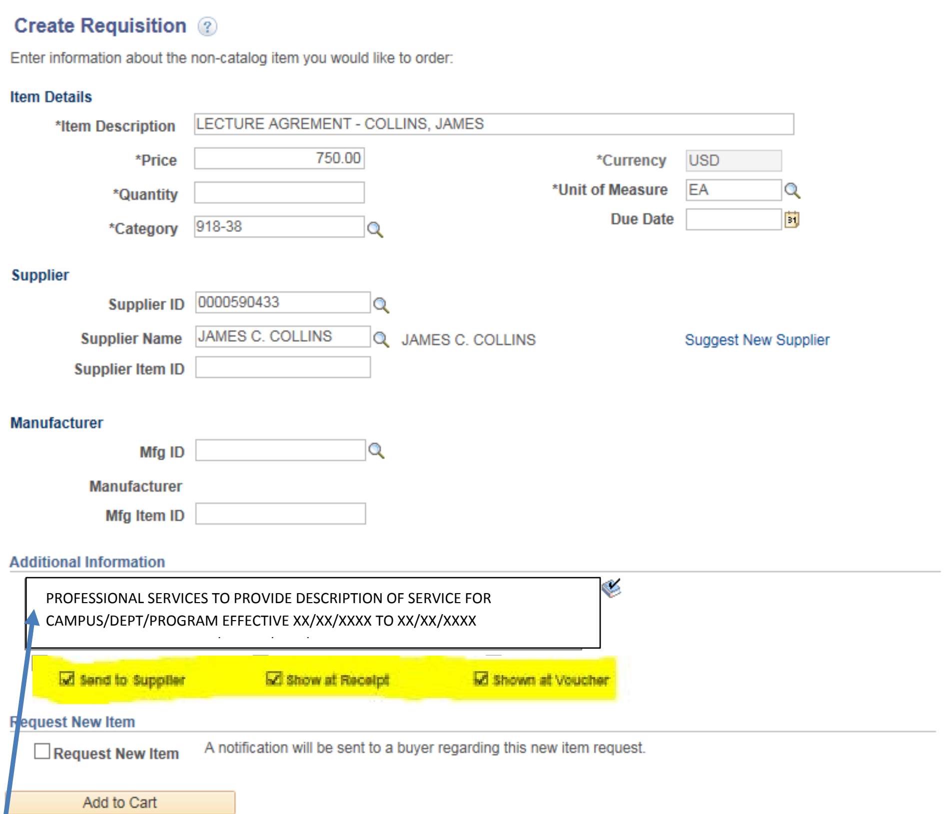
Click OK.



The Requisition Settings page is complete. To begin creating the requisition, click the "Special Requests" link.



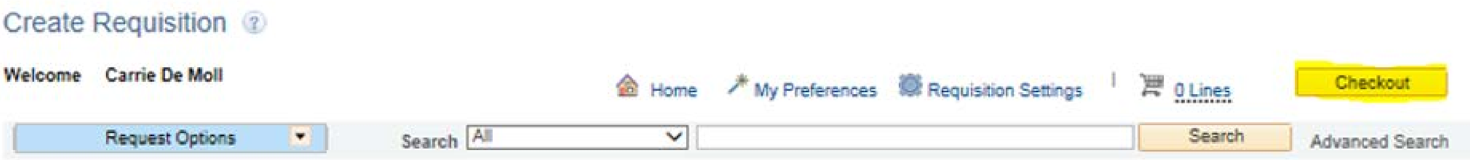
Enter Item Description starting with "PERFORMANCE AGREEMENT – SUPPLIER'S NAME". Add the amount of the Performance Agreement and enter the quantity as "1". In the Additional Information box, enter the Performance Agreement Language shown below. Click all 3 boxes: Send to Supplier, Show at Receipt,and Shown at Voucher. Then click "Add to Cart".



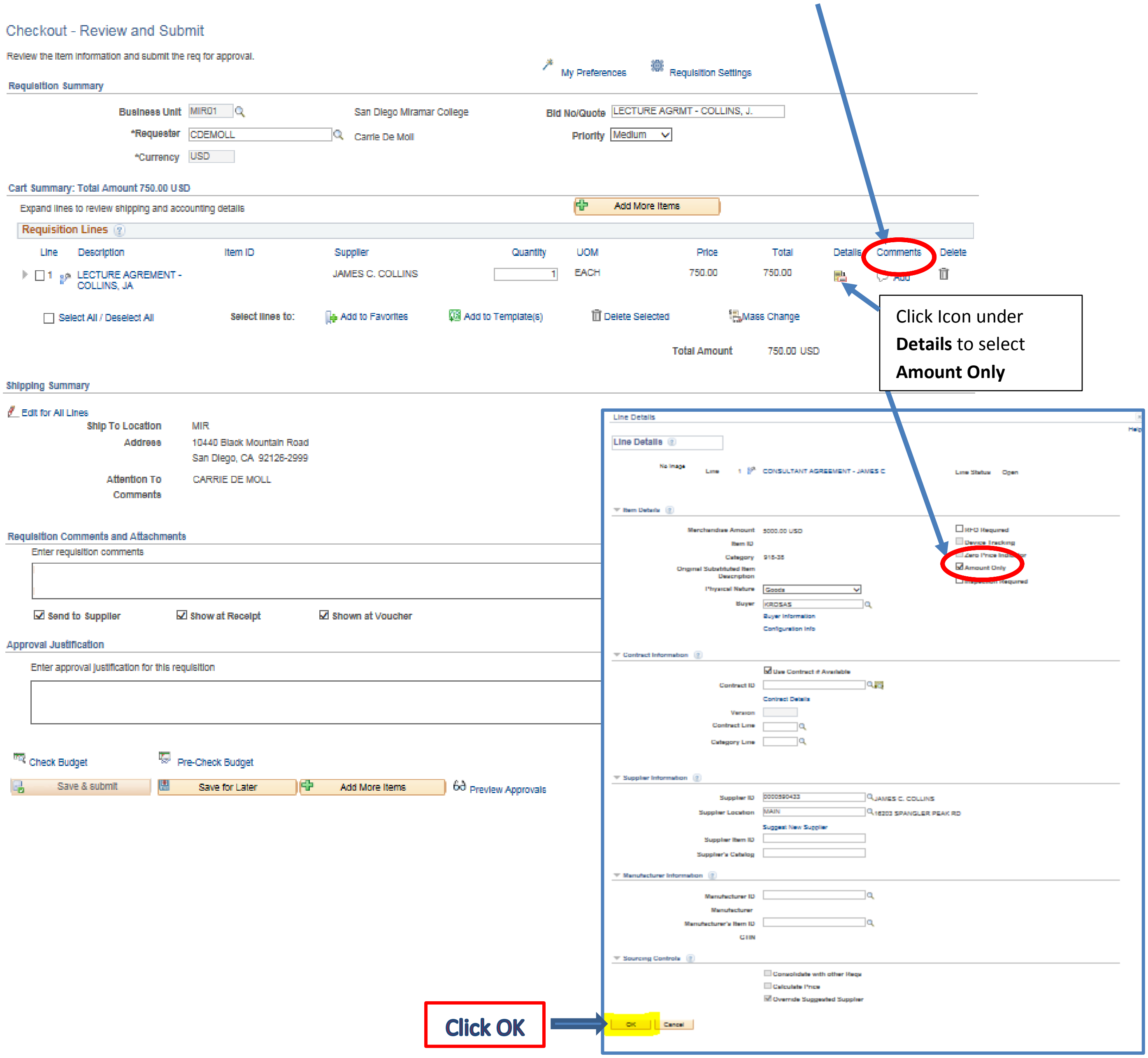
Highlighted areas require you to provide specific information for each agreement.

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

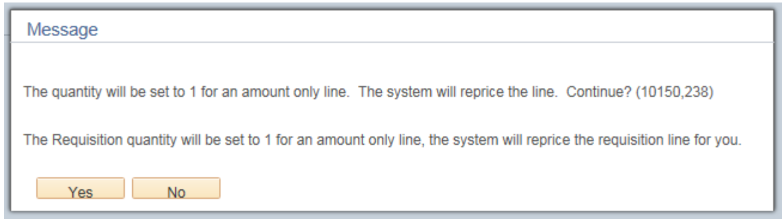
On the next page, click "Checkout".



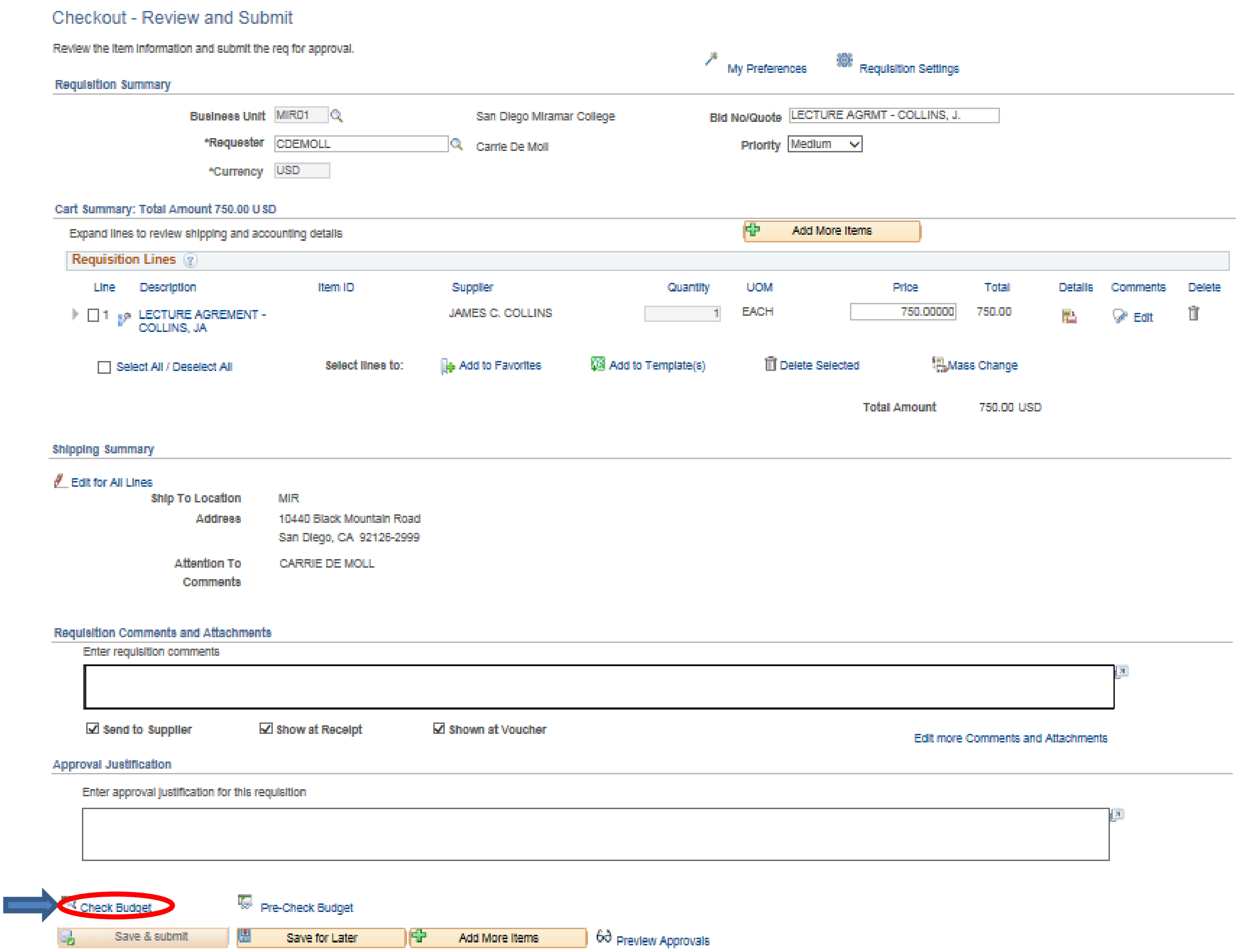
On the Checkout page, attach the Request for Contract, Scope of Work and Payment Provisions, and signed Evaluation of Employer-Employee Relationship form under Comments



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*.