

## **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 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.

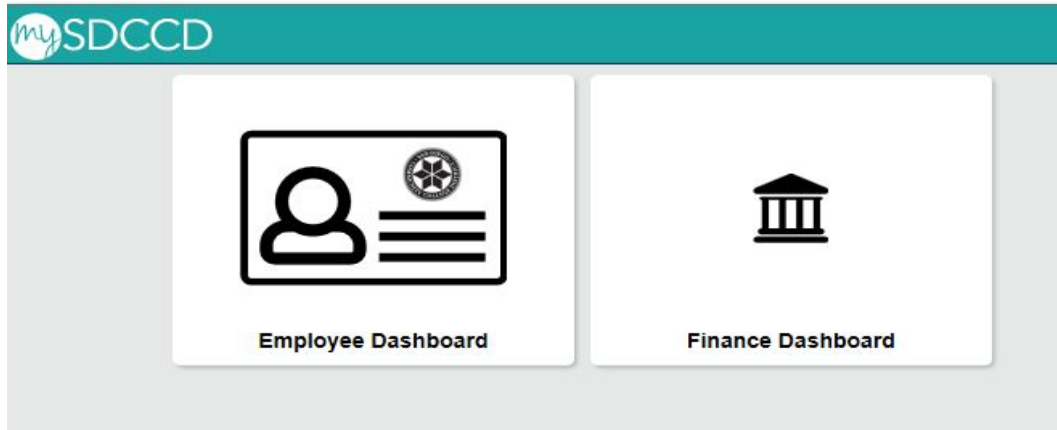
**CHECK “AMOUNT ONLY” BOX:** YES

**PAYMENT PROCESS TO SUPPLIER:** SUPPLIER PROVIDES REQUESTER OR CAMPUS WITH INVOICE. THE REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTERS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

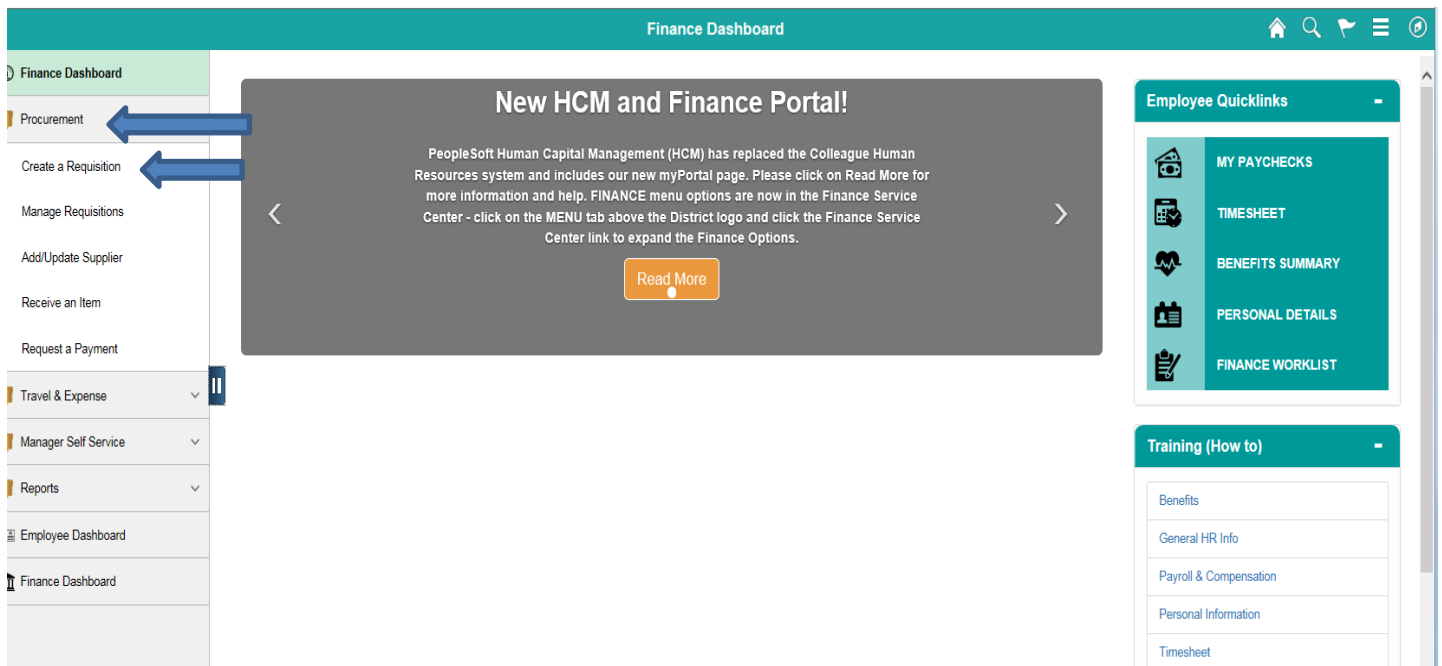
*Note: The process for Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.*

**Log into your SDCCD account and open PeopleSoft.**

**Navigate to Create a Requisition from the home page by selecting: Finance Dashboard/  
Procurement/Create a Requisition.**



**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 UnitMIR01San Diego Miramar College

Bid No/Quote

\*RequesterCDEMOLLCarrie De Moll

PriorityMedium

\*CurrencyUSD

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 MeasureEA

Buyer

Shipping Defaults

Ship ToMIR

Due Date

Attention

Distribution Defaults

SpeedChart

Accounting Defaults

PersonalizeFind1 of 1Last

Chartfields1

| Dist | Percent | Location | GL Unit | Fund | Dept | Product | Account |
|------|---------|----------|---------|------|------|---------|---------|
| 1    |         | MIR      | MIR01   |      |      |         |         |

OK

Cancel

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

Requisition Settings

Business UnitMIR01San Diego Miramar College

Bid No/QuoteCONSULTANT AGRMT - J COLLINS

\*RequesterCDEMOLLCarrie De Moll

PriorityMedium

\*CurrencyUSD

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

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 MeasureEA

Buyer

Supplier ID

NameJAMES C. COLLINS

Short Supplier Name

Alternate Supp Name

City

Country

State

Postal Code

Find

Reset

Help

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  Find

Name JAMES C. COLLINS Reset

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    |  |

Select Cancel

Enter Category Code (918-00)

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 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 ?

**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  918-00 918-00 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  CARRIE DE MOLL

#### 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   |      |      |         |         |

OK Cancel

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

All Request Options

Web  
Office Solutions Punch Out

Create Requisition

Favorites

Templates

ePro Services  
Fixed Cost Service  
Variable Cost Service  
Time and Materials

Recently Ordered

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

\*Quantity 1

\*Category 018-38

\*Currency USD

\*Unit of Measure EA

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 SERVICES FOR CAMPUS/DEPT/PROGRAM  
EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX  
CONTACT PERSON: NAME/PHONE AND/OR EMAIL

☐ 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 INVOICE 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



My Preferences

Requisition Settings

0 Lines

Checkout

Request Options

Search

All



Search

Advanced Search

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

### 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

Click OK

Line Details

Line Details

No Image

Line 1

CONSULTANT AGREEMENT - JAMES C

Line Status Open

Item Details

Merchandise Amount 5000.00 USD

Item ID

Category 915-25

Original Substituted Item Description

Physical Nature Goods

Buyer KROSAS

Buyer Information

Configuration Info

Contract Information

Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information

Supplier ID 000050432

Supplier Location SAN

Supplier Item ID

Supplier's Catalog

Manufacturer Information

Manufacturer ID

Manufacturer

Manufacturer's Item ID

C10N

Sourcing Controls

Consolidate with other Hops

Calculate Price

Override Suggested Supplier

Amount Only

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.

Yes

No

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

MIR01

San Diego Miramar College

Bid No/Quote

CONSULTANT AGRMT - J COLLINS

Requester

CDEMOLL

Carrie De Moll

Requisition ID

MRR0005914

\*Currency

USD

Priority

Medium

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 Amount5,000.00 USD

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

CONSULTANT SERVICES TO POLICE ACADEMY FOR MIR/PUBLIC SAFETY/OIS/MIRAMAR (EFFECTIVE DATES: 7/1/18 TO 6/30/19 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*.

CONSULTANT AGREEMENT – Revised 07/21/26

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