LECTURE AGREEMENT PURCHASE REQUISITION

PURPOSE: TO RECORD AND ENCUMBER FUNDS FOR A LECTURE AGREEMENT CONTRACT

REQUIRED DOCUMENTATION & PREAPPROVALS:

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. SEE INSTRUCTIONS BELOW FOR REQUIRED DOCUMENTS
3. BUDGET NUMBER AND AVAILABLE FUNDING

PAID SPEAKERS UNDER $1,000

- A SIGNED RELEASE OF LIABILITY FORM
- NO INSURANCE REQUIRED
- A PURCHASE REQUISITION ENTERED IN PEOPLESOFT; ATTACH THE COMPLETED RELEASE OF LIABILITY FORM TO THE REQUISITION. ONCE THE PURCHASE ORDER IS ISSUED, THE SPEAKER WILL SUBMIT AN INVOICE TO DISTRICT ACCOUNTS PAYABLE (APINVOICE@SDCCD.EDU) FOR PAYMENT PROCESSING UPON COMPLETION OF THE SPEAKING EVENT.

PAID SPEAKERS OVER $1,000

- A COMPLETED REQUEST FOR CONTRACT FORM (RFC PROCESS FAQ SHEET)
- INSURANCE REQUIRED
- A PURCHASE REQUISITION ENTERED IN PEOPLESOFT; ATTACH THE RFC FORM TO THE REQUISITION. ONCE THE PURCHASE ORDER AND AGREEMENT IS ISSUED, THE SPEAKER WILL SUBMNIT AN INVOICE TO DISTRICT ACCOUNTS PAYABLE APINVOICE@SDCCD.EDU FOR PAYMENT PROCESSING, UPON COMPLETION OF THE SPEAKING EVENT.

REQUIRED ATTACHMENT: REQUEST FOR CONTRACT FORM OR SIGNED RELEASE OF LIABILITY FORM

CHECK “AMOUNT ONLY” BOX: YES

CATEGORY CODE: 900-00

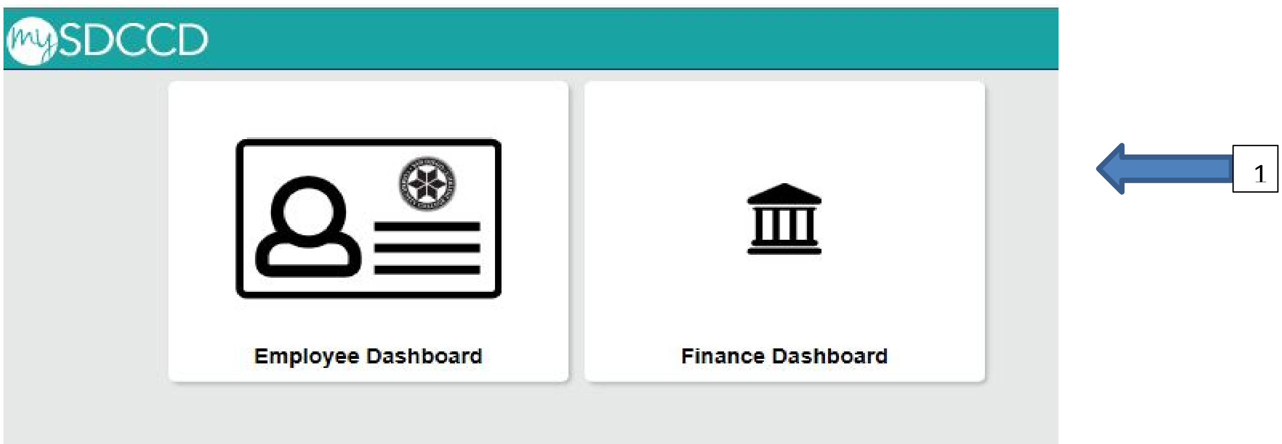
PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE SPEAKER OR REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE APINVOICE@SDCCD.EDU. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS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

Note: The process for Lecture 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.

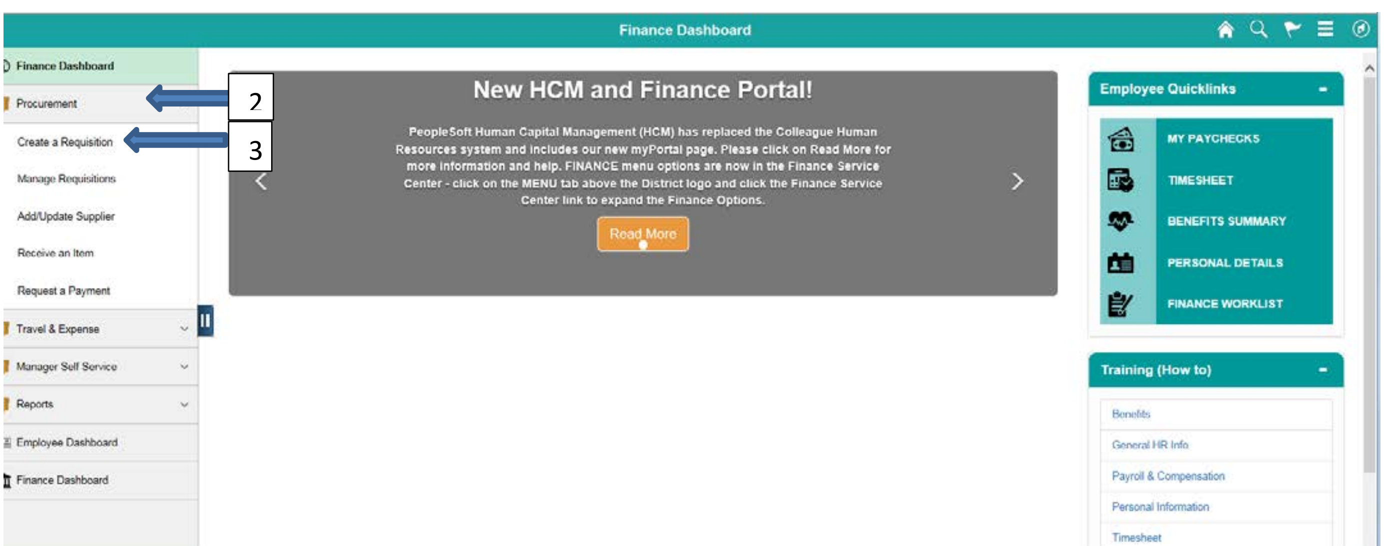
LECTURE AGREEMENT REQUISITION

Log into your SDCCD account and open PeopleSoft.

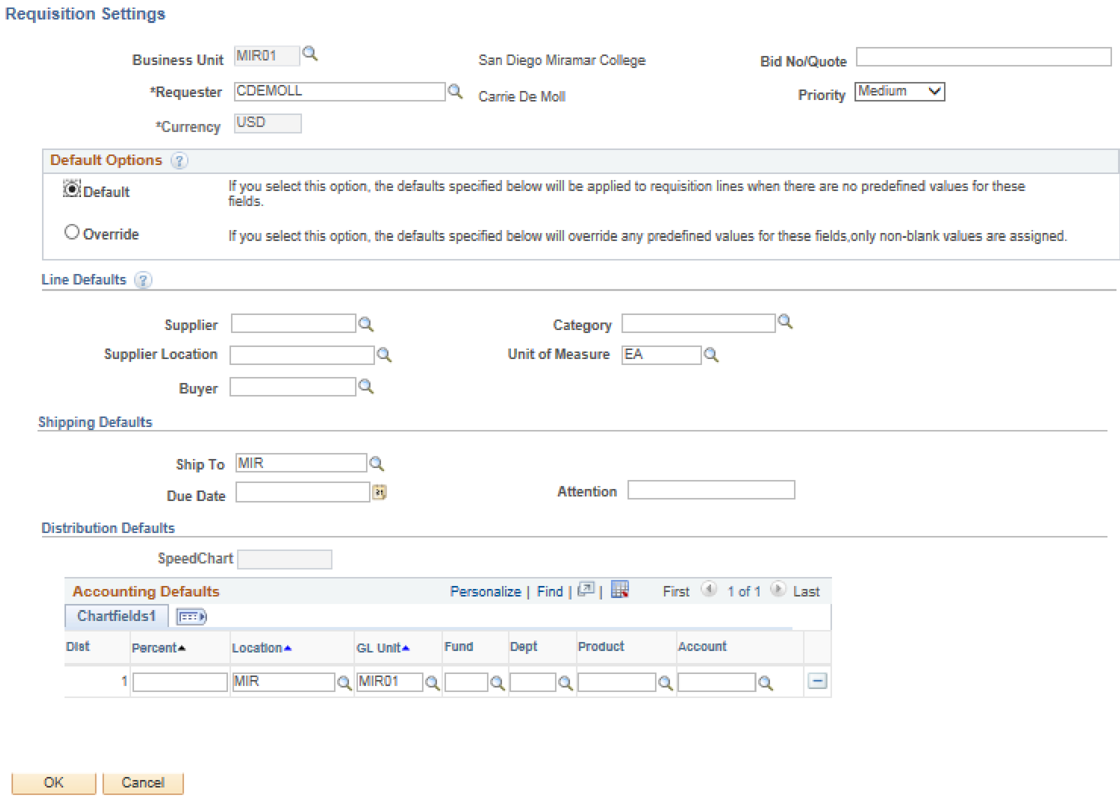
Navigate to Create a Requisition from the home page by selecting: Finance Dashboard/ Procurement/Create a Requisition.



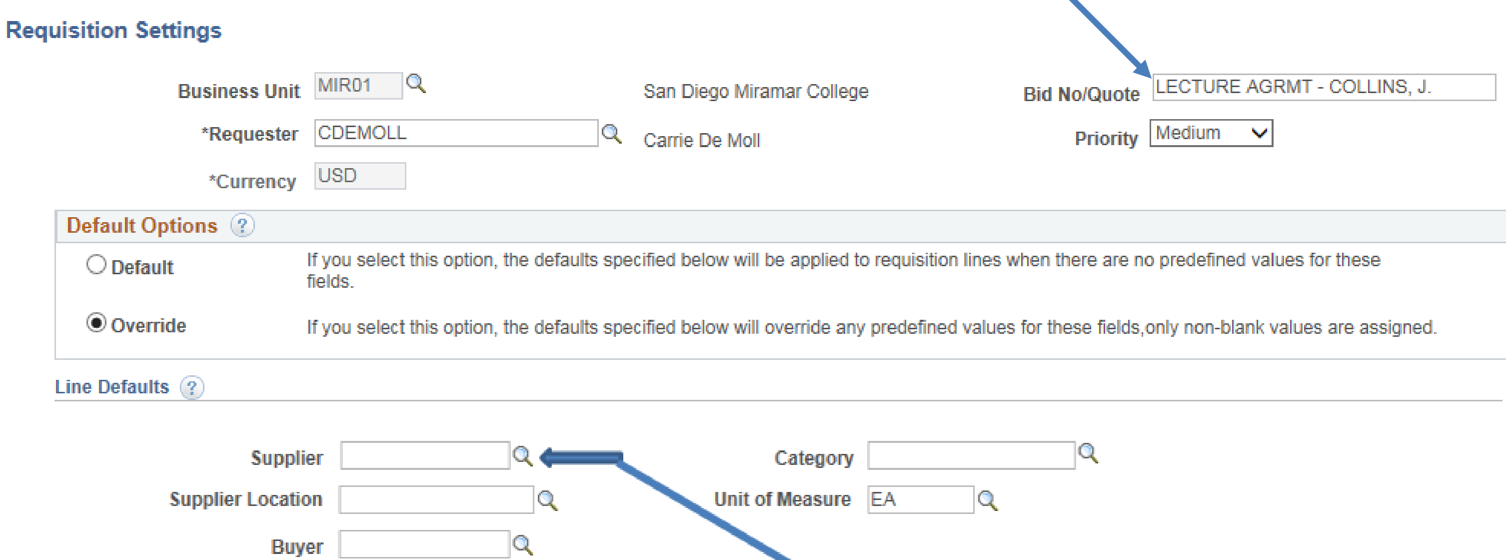
Next, navigate to *Procurement/Create a Requisition*.



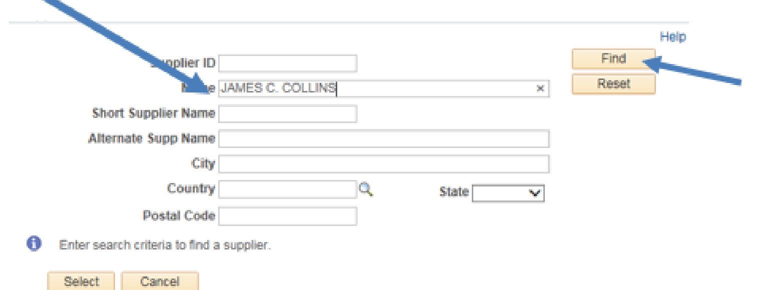
This is the *Requisition Settings* page. When creating a requisition, enter info on this page and it will auto populate into each line item of the requisition.



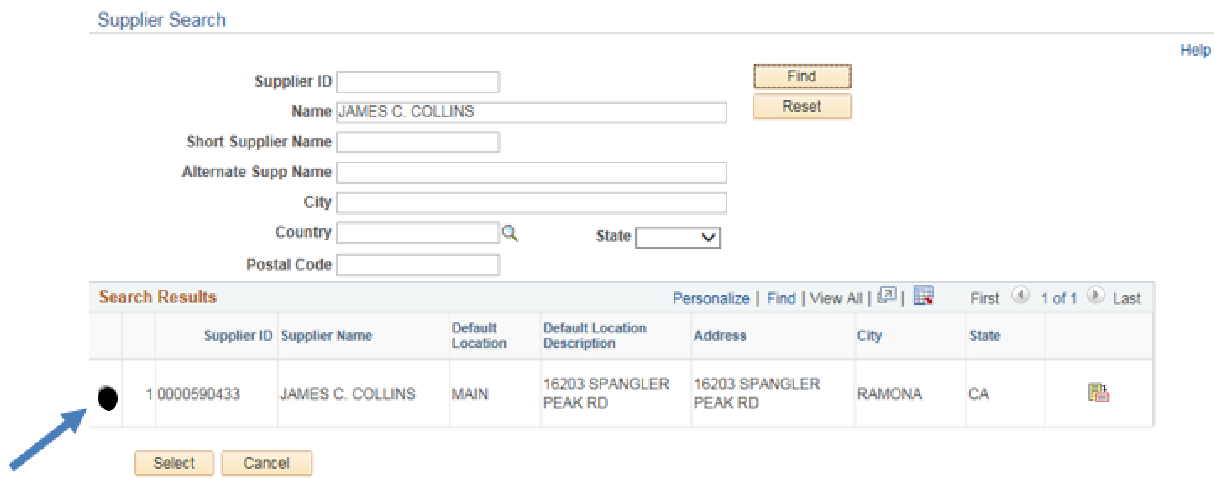
The "Bid No/Quote" field should follow the naming convention "LECTURE AGRMT–VENDOR NAME".



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".



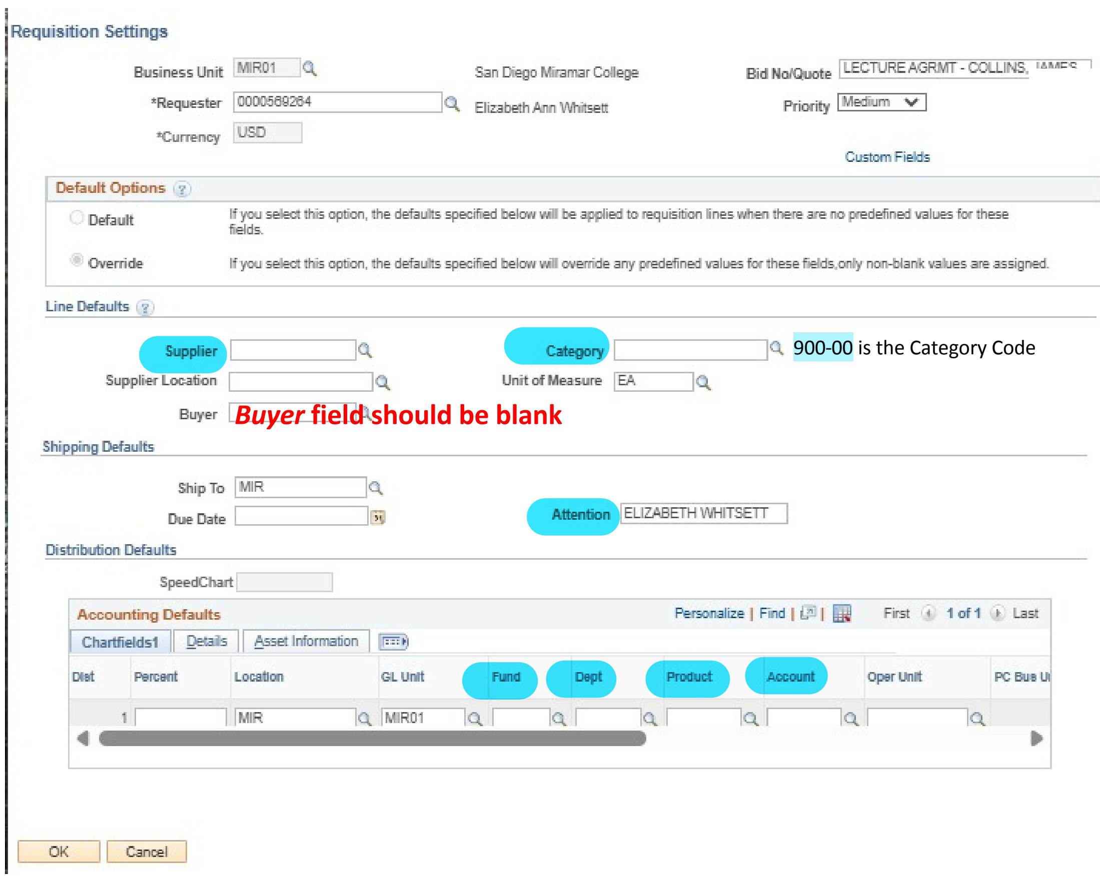
Enter Category Code (900-00)

Buyer field should be blank

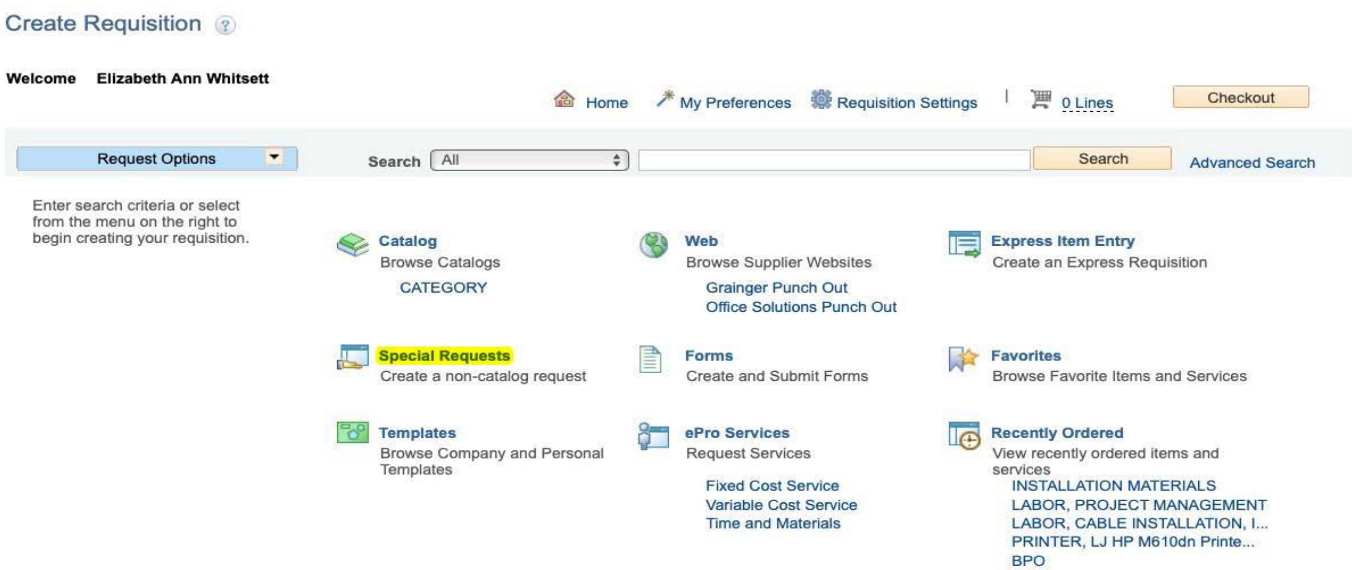
Attention field should be the Requester

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

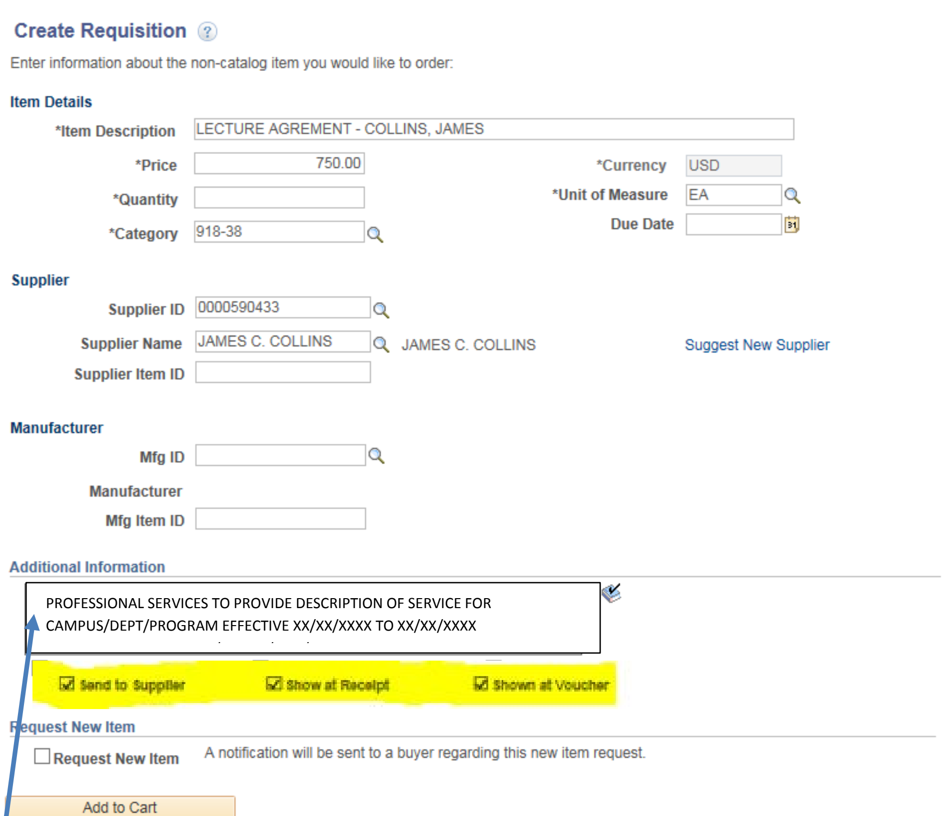
Click OK.



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



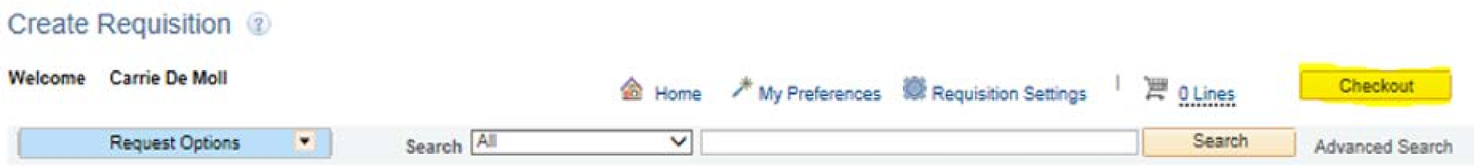
Enter Item Description starting with "LECTURE AGREEMENT – SUPPLIER'S NAME". Add the amount of the Lecture Agreement and enter the quantity as "1". In the Additional Information box, enter the Lecture Agreement Language shown below. Click all 3 boxes: Send to Supplier, Show at Receipt,and Shown at Voucher.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



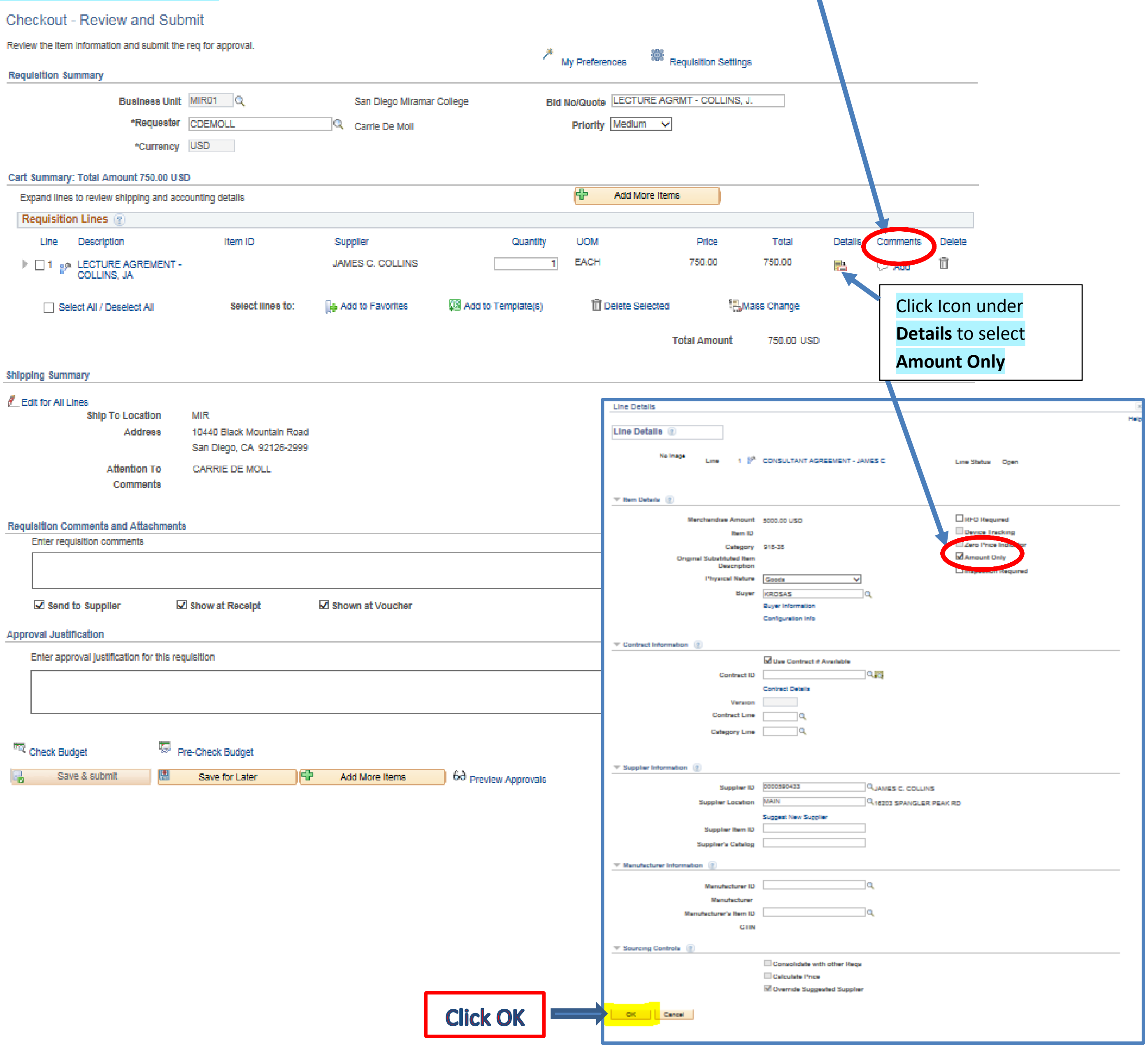
Highlighted areas require you to provide specific information for each agreement.

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 INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

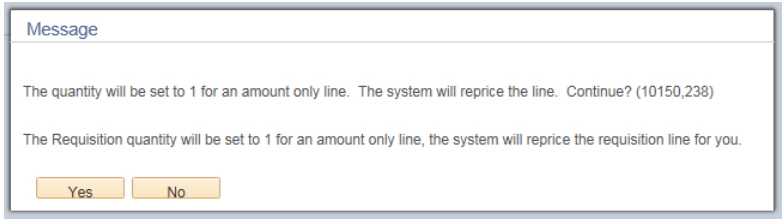
On the next page, click “Checkout”.



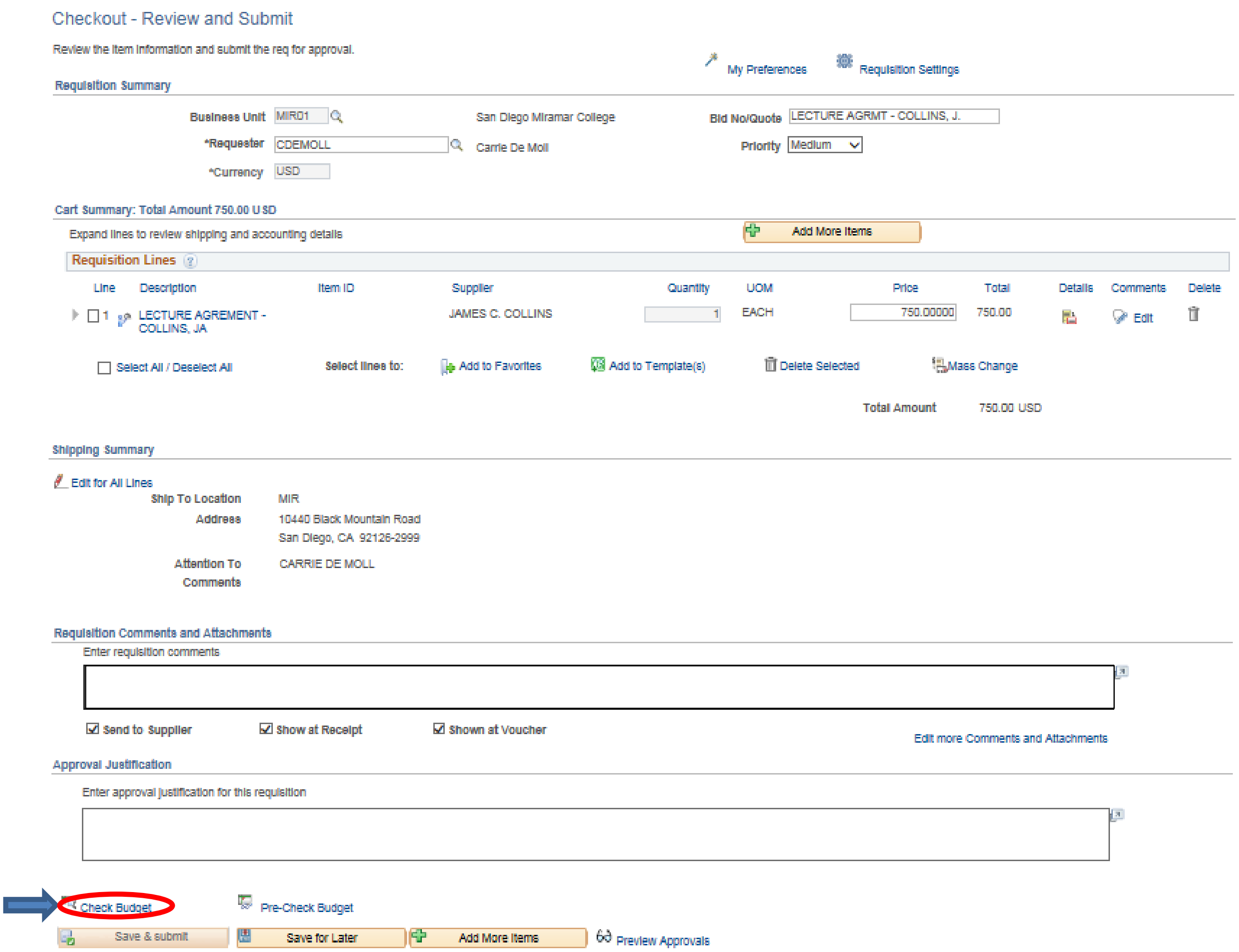
On the Checkout page, attach the Release of Liability form or Request for Contract, Scope of Work and Payment Provisions under Comments



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*.