

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

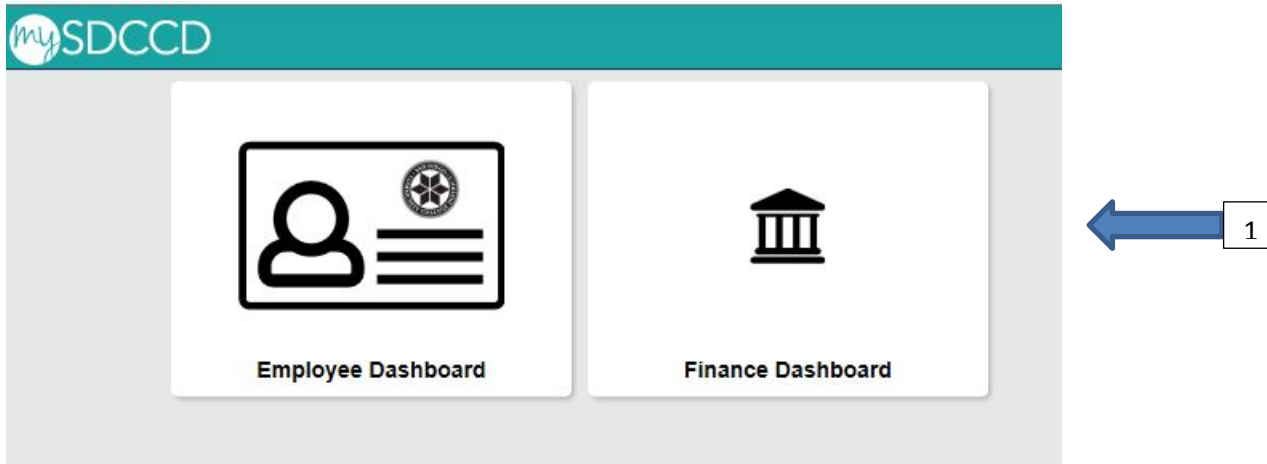
PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

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.

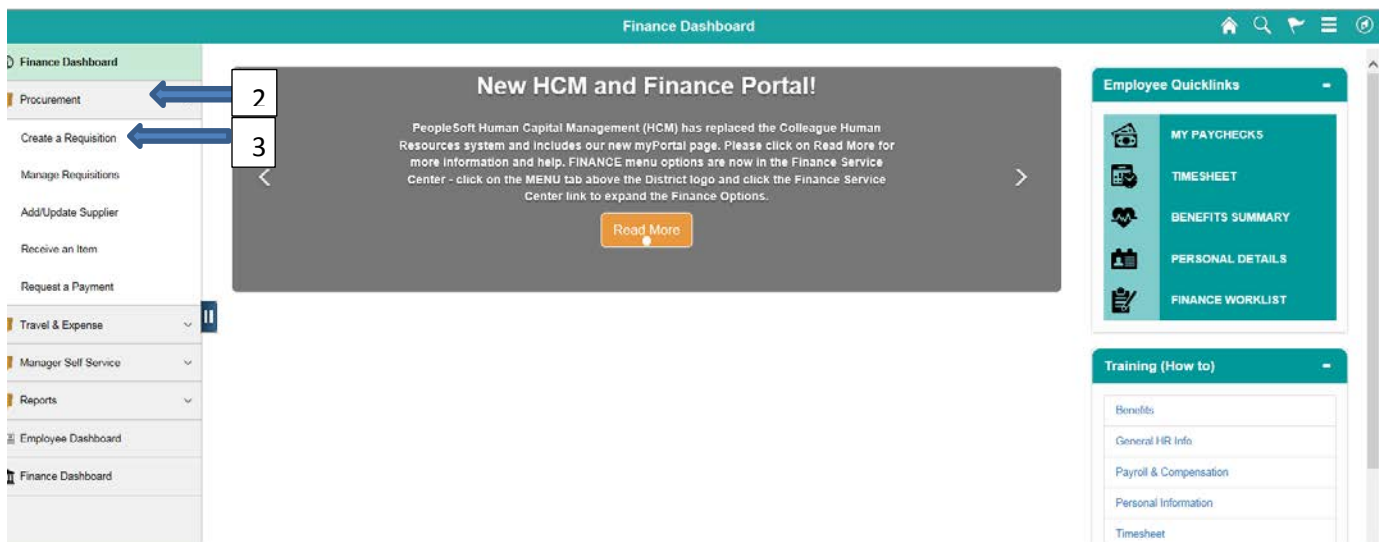
PERFORMANCE AGREEMENT REQUISITION

Log into 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.

Requisition Settings

Business Unit

MIR01

San Diego Miramar College

Bid No/Quote

*Requester

CDEMOLL

Carrie De Moll

Priority

Medium

*Currency

USD

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 Measure

EA

Buyer

Shipping Defaults

Ship To

MIR

Due Date

Attention

Distribution Defaults

SpeedChart

Accounting Defaults

Personalize

Find

1 of 1

Last

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 “PERFORMANCE AGRMT – VENDOR NAME”.

Requisition Settings

Business Unit

MIR01

San Diego Miramar College

Bid No/Quote

LECTURE AGRMT - COLLINS, J.

*Requester

CDEMOLL

Carrie De Moll

Priority

Medium

*Currency

USD

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 Measure

EA

Buyer

Supplier ID

Short Supplier Name

Alternate Supp Name

City

Country

State

Postal Code

Enter search criteria to find a supplier.

Select

Cancel

Find

Reset

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".

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	
	1 0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER PEAK RD	16203 SPANGLER PEAK RD	RAMONA	CA	

Select Cancel

Enter Category Code (962-00)

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 MIR01 San Diego Miramar College Bid No/Quote PERF

*Requester 0000569264 Elizabeth Ann Whitsett Priority Medium

*Currency USD Custom Fields

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 0000590433 Category 962-00

Supplier Location MAIN Unit of Measure EA

Buyer

Shipping Defaults

Ship To MIR

Due Date Attention ELIZABETH WHITSETT

Distribution Defaults

SpeedChart

Accounting Defaults Personalize Find First 1 of 1 Last

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus U
1		MIR	MIR01						

OK Cancel

The Requisition Settings page is complete. 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 **"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"**.

Create Requisition ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description LECTURE AGREEMENT - COLLINS, JAMES

*Price 750.00

*Quantity

*Category 918-38

*Currency USD

*Unit of Measure EA

Due Date

Supplier

Supplier ID 0000590433

Supplier Name JAMES C. COLLINS

Supplier Item ID

Suggest New Supplier

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR
CAMPUS/DEPT/PROGRAM EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX

☒ Send to Supplier

☒ Show at Receipt

☒ Shown at Voucher

Request New Item

☐ Request New Item

A notification will be sent to a buyer regarding this new item request.

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”.

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

MIR01

San Diego Miramar College

Bld No/Quote

LECTURE AGRMT - COLLINS, J.

*Requester

CDEMOLL

Carrie De Moll

Priority

Medium

*Currency

USD

Cart Summary: Total Amount 750.00 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	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00	750.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 750.00 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

☒ 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 Approvals

Click Icon under
Details to select
Amount Only

Line Details

Line Details

No Image

Line 1

CONSULTANT AGREEMENT - JAMES C

Line Status: Open

Item Details

Merchandise Amount: \$000.00 USD

Item ID

Category: 910-25

Original Substituted Item Description

Physical Nature: Goods

Buyer: 10000000

Buyer Information

Configuration Info

Contract Information

Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information

Supplier ID: 000000000

Supplier Location: SAN

Supplier Name: Supplier

Supplier's Catalog

Manufacturer Information

Manufacturer ID

Manufacturer's Item ID

Sourcing Controls

Consolidate with other Req

Calculate Price

Override Suggested Supplier

Click OK

OK

Cancel

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”.

Checkout - 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

Bld No/Quote

LECTURE AGRMT - COLLINS, J.

*Requester

CDEMOLL

Carle De Moll

Priority

Medium

*Currency

USD

Cart Summary: Total Amount 750.00 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	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00000	750.00			

Select All / Deselect All

Select lines to:

Add to Favorites

Add to Template(s)

Delete Selected

Mass Change

Total Amount

750.00 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

Send to Supplier

Show at Receipt

Shown at Voucher

Edit more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

Check Budget

Pre-Check Budget

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*.