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. APPROVED CONSULTANT AGREEMENT CONTRACT
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: CONSULTANT AGREEMENT CONTRACT, INCLUDING SCOPE OF WORK, SIGNED BY CONSULTANT, CAMPUS CONTACT AND DISTRICT PURCHASING MANAGER

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 Lecture Agreements and 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 User ID & enter the PeopleSoft password you created.**

Click on Finance Dashboard
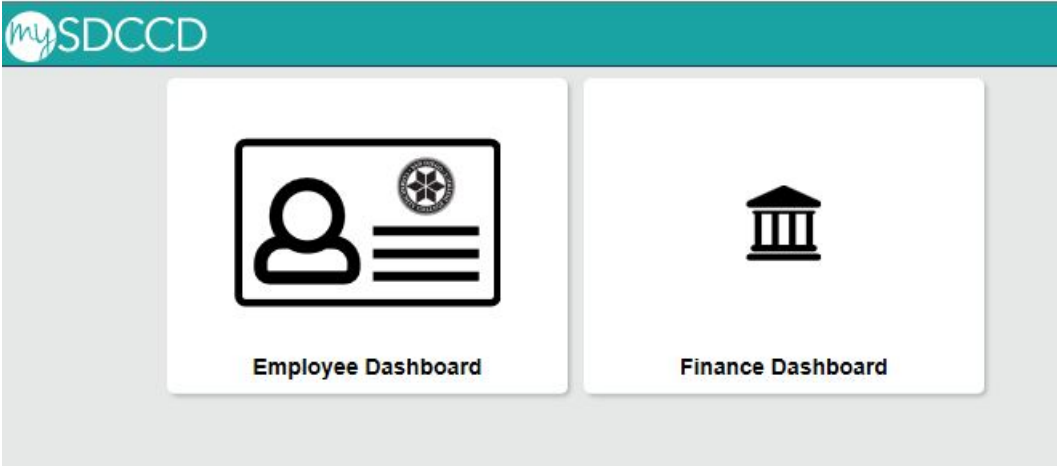
Next, click on Procurement, then Create a Requisition.
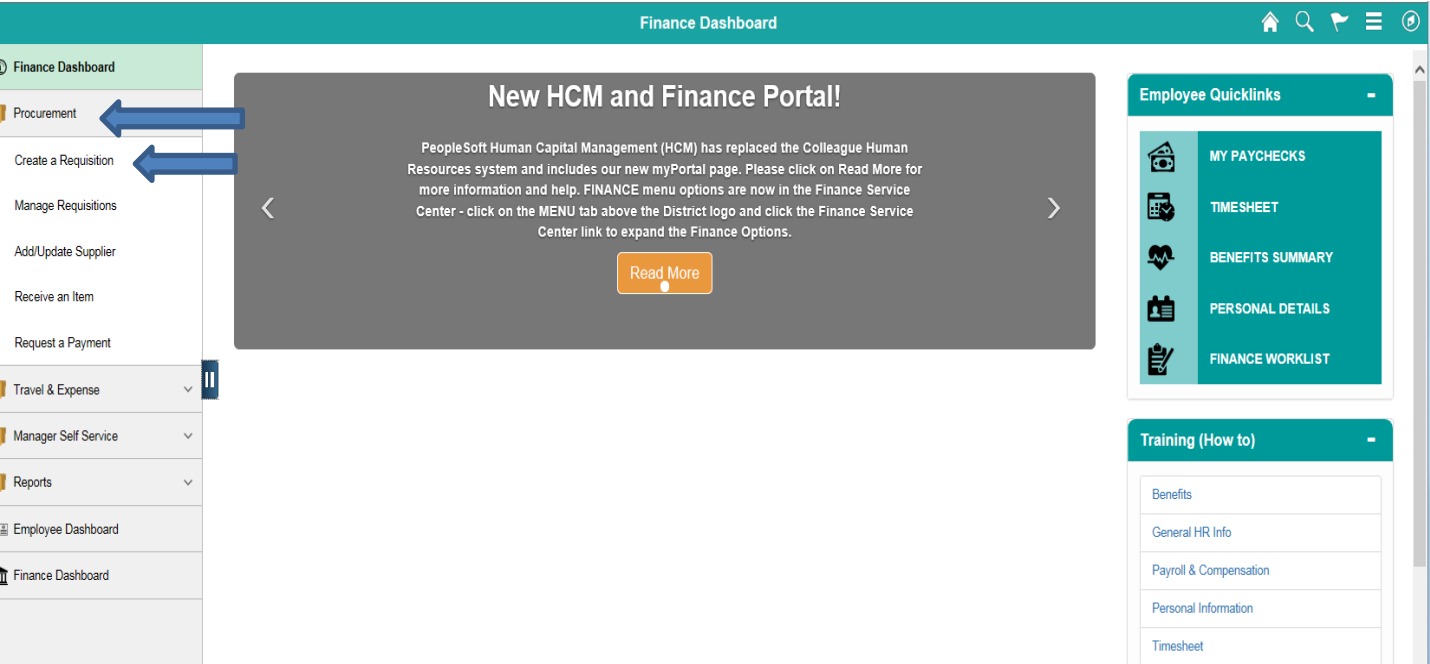
To create a requisition, enter information on this page and it will auto populate into each line item of the requisition.

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".

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 (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.

Requisition Settings

Business Unit	MIR01		San Diego Miramar College	Bid No/Quote	CONSULTANT AGRMT - J COLLINS
*Requester	CDEMOLL		Carrie De Moll	Priority	Medium
*Currency	USD				

Default Options ②

○ 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 ②

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	0000590433	Category	918-38	→	918-38 is the Category Code for all Consultant Agreements
Supplier Location	MAIN	Unit of Measure	EA		
Buyer	KROSAS	←	*Buyer* field should be blank		

Shipping Defaults

| Ship To | MIR | | |
| 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.

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".

Create Requisition ⓘ

Welcome   Carrie De Moll   🏠 Home   ✴ My Preferences   ⚙ Requisition Settings | 🛒 0 Lines   Checkout

Request Options ▼   Search All ▼   [   ]   Search   Advanced Search

On the Checkout page, attach the district-signed Consultant Agreement 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   Bid No/Quote CONSULTANT AGRMT - J COLLINS
*Requester CDEMOLL 🔍   Carrie De Moll   Priority Medium ▼
*Currency USD

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		💬 Add	🗑

☐ Select All / Deselect All   Select lines to: ➕ Add to Favorites   ▦ Add to Template(s)   🗑 Delete Selected   🔀 Mass Change

Click Icon under **Details** to select **Amount Only**

Total Amount   5,000.00 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
    [   ]

☐ 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   66 Preview Approval

Line Details

Line Details ⓘ   Help

No Image   Line   1 CONSULTANT AGREEMENT - JAMES C   Line Status Open

▼ Item Details ⓘ

    Merchandise Amount 5000.00 USD   ☐ RFQ Required
    Item ID   ☐ Device Tracking
    Category 918-36   ☐ _____
    Original Substituted Item   ☑ Amount Only
    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 0000590433   🔍 JAMES C. COLLINS
    Supplier Location MAIN   🔍 16203 SPANGLER PEAK RD
    Suggest New Supplier
    Supplier Item ID
    Supplier's Catalog

▼ Manufacturer Information ⓘ
    Manufacturer ID   🔍
    Manufacturer
    Manufacturer's Item ID   🔍
    GTIN

▼ Sourcing Controls ⓘ
                                         ☐ Consolidate with other Reqs
                                         ☐ 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".

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, complete a Special Handling Form and email it to **APspecialhandling@sdccd.edu.**