

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 AND DISTRICT PURCHASING SUPERVISOR

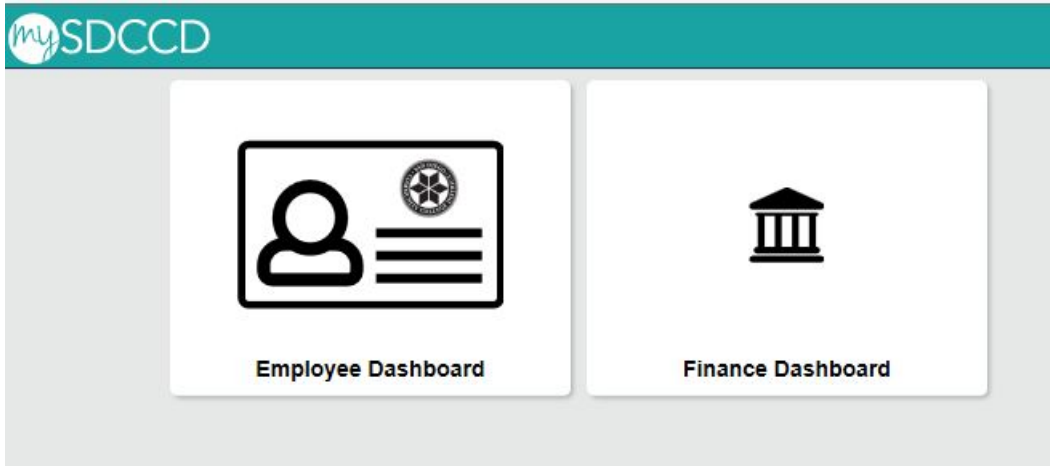
CHECK “AMOUNT ONLY” BOX: YES

PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. INVOICE IS ELECTRONICALLY ROUTED WITHIN PEOPLESOFT FOR APPROVAL. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT.

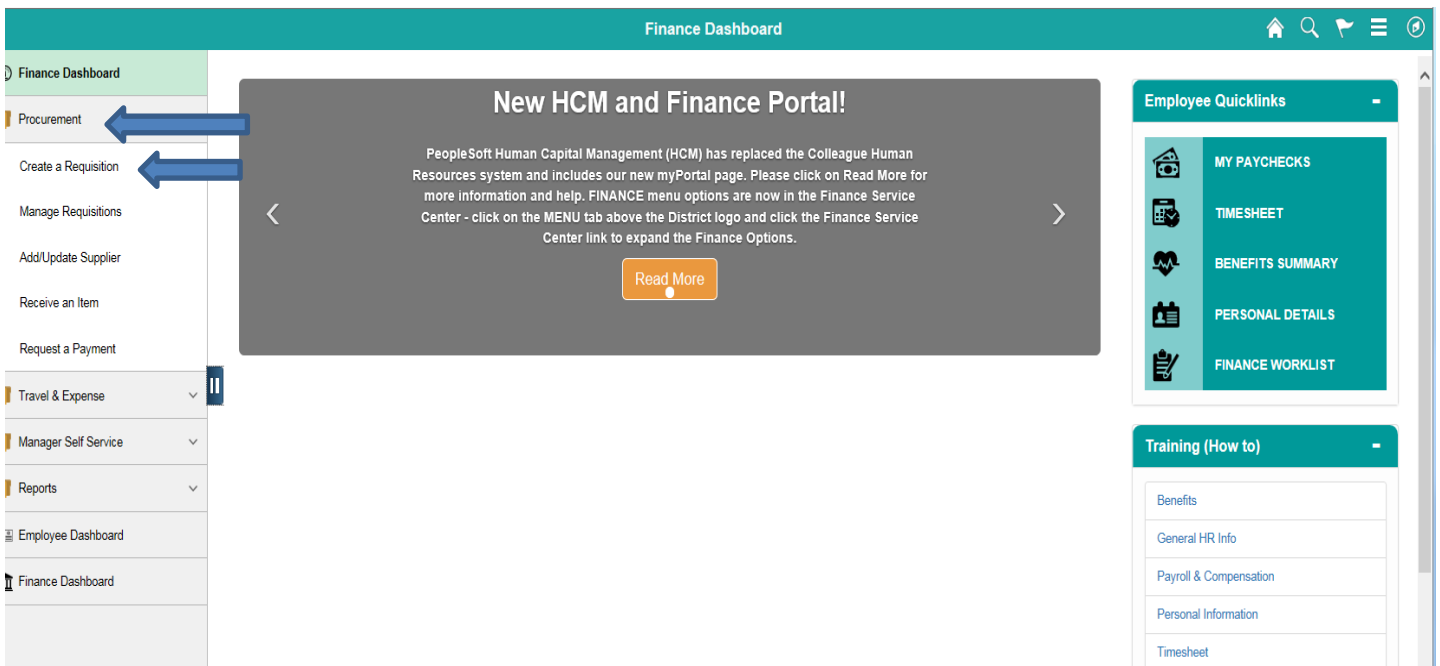
Note: The process for Lecture Agreements and Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

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.

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 ?

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To Attention

Due Date

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | | First 1 of 1 Last

Chartfields1

Dist	Percent▲	Location▲	GL Unit▲	Fund	Dept	Product	Account
1	<input type="text"/>	<input type="text" value="MIR"/>	<input type="text" value="MIR01"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

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

Requisition Settings

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*Requester Carrie De Moll Priority

*Currency

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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 Measure

Buyer

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Find Reset

Enter search criteria to find a supplier.

Select Cancel

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	
<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 (918-38), Buyer (Kelly Rosas) and to whose attention this should go (typically 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

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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 Measure

Buyer

918-38 is the Category Code for all Consultant Agreements

Shipping Defaults

Ship To Attention

Due Date

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

On the next page click on “Create Requisition”.

Create Requisition ?

Welcome Carrie De Moll

[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.



Web

Browse Supplier Websites

Office Solutions Punch Out



Create Requisition

Create a non-catalog request



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

SHIPPING AND HANDLING
SIGN, BULLETIN BOARD, OUTDOO...
Insertable Big Tab Dividers,...
Lightweight Hand Letter Open...
Magic Tape Value Pack, 3/4" ...
More...

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

*Price

*Currency

*Quantity

*Unit of Measure

*Category

Due Date

Supplier

Supplier ID

Supplier Name

Supplier Item ID

[Suggest New Supplier](#)

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 INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD

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

On the next page, click "Checkout".

Create Requisition ?

Welcome Carrie De Moll



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

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

Line Details

Line 1: CONSULTANT AGREEMENT - JAMES C

Merchandise Amount: 5000.00 USD
Item ID: 910-00
Category: 910-00
Original Substituted Item Description:
Physical Nature: Goods
Buyer: KRODASAS
Buyer Information:
Configuration Info:

RFID Required
 Device Tracking
 Amount Only

Contract Information:
 Use Contract if Available
Contract ID:
Contract Details:
Version:
Contract Line:
Category Line:

Supplier Information:
Supplier ID: 000050433 JAMES C. COLLINS
Supplier Location: SAN DIEGO 16200 SPANGLER PEAK RD
Supplier Item ID:
Supplier's Catalog:

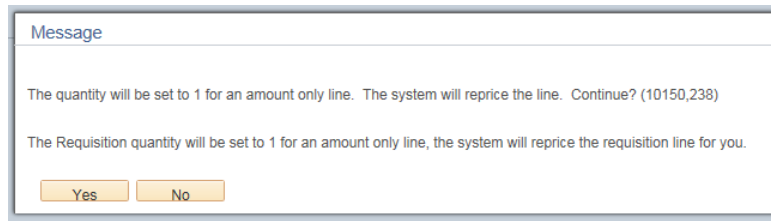
Manufacturer Information:
Manufacturer ID:
Manufacturer:
Manufacturer's Item ID:
C19N

Sourcing Controls:
 Consolidate with other Hops
 Calculate Price
 Override Suggested Supplier

OK Cancel

Click OK

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”.

Edit Requisition - 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 Requisition ID:
*Currency: Priority:

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

Shipping Summary

[Edit for All Lines](#)

Ship To Location: MIR
Address: 10440 Black Mountain Road
San Diego, CA 92128-2999
Attention To: CARRIE DE MOLL
Comments:

Requisition Comments and Attachments

Enter requisition comments

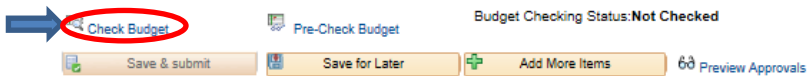
CONSULTANT SERVICES TO POLICE ACADEMY FOR MIR/PUBLIC SAFETY/OIS/MIRAMAR (EFFECTIVE DATES: 7/1/18 TO 8/30/19 CAMPUS CONTACT PERSON: (name, phone #, room #) SCOPE OF WORK/CONSULTANT AGREEMENT ATTACHED

Send to Supplier Show at Receipt Shown at Voucher

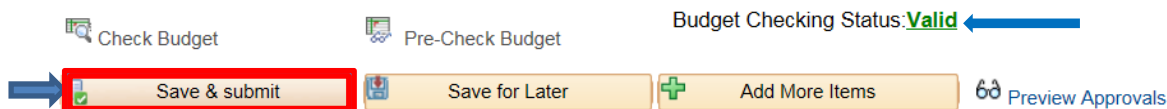
[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition



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.