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 <u>myportal.sdccd.edu</u> using your 10 digit Employee ID number as your User ID & enter the PeopleSoft password you created.

Click on Finance Dashboard

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Employee Dashboard	Finance Dashboard

Next, click on Procurement, then Create a Requisition.

	Finance Dashboard	â Q 🏲 ☰ Ø
Finance Dashboard		
Procurement	New HCM and Finance Portal!	Employee Quicklinks -
Create a Requisition	PeopleSoft Human Capital Management (HCM) has replaced the Colleague Human Resources system and includes our new myPortal page. Please click on Read More for	МУ РАУСНЕСКЯ
Manage Requisitions	more information and help. FINANCE menu options are now in the Finance Service Center - click on the MENU tab above the District logo and click the Finance Service Center link to expand the Finance Options.	ТМЕЗНЕЕТ
Add/Update Supplier	Read More	BENEFITS SUMMARY
Receive an Item		PERSONAL DETAILS
Request a Payment		FINANCE WORKLIST
Travel & Expense V		
Manager Self Service V		Training (How to) –
Reports ~		Benefits
Employee Dashboard		General HR Info
Finance Dashboard		Payroll & Compensation
		Personal Information
		Timesheet

To create a requisition, enter information on this page and it will auto populate into each line item of the requisition. Requisition Settings

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OK Cancel

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

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	corresponding field				
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Supplier]a (a]a	Category		Help

Supplier's ID # and related information will pop up. Click on the circle to select vendor and click "Select".

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Enter Category Code (918-38)

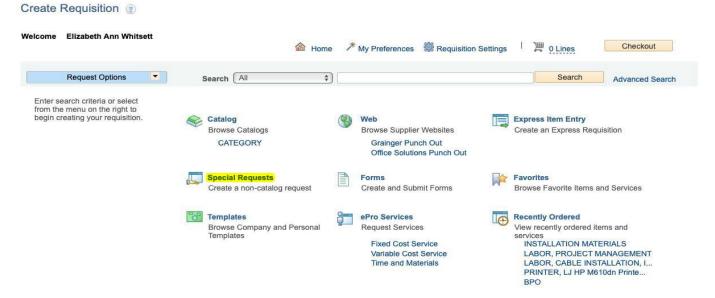
Buyer field should be blank

Attention field should be the Requester

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

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 does not reflect the data in the selected lines that are available for sourcing.	Business Unit	MIR01		San Diego M	iramar College	Bid	No/Quote CO	NSULTANT AGRMT - J COL
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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".

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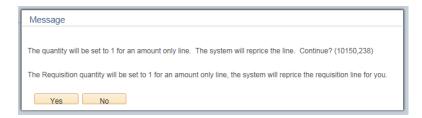
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On the Checkout page, attach the district-signed Consultant Agreement under Comments

Checkout - Review and Sub	mit					
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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 a	and Submit									
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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	68 Preview Approvals

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.