Create a Requisition

Contract for Professional Services Checklist

- Select a Supplier. *(Consider the preferred suppliers.)*
  - U-Wide Contracts at http://uwidecontracts.umn.edu
  - Targeted suppliers: small businesses owned by women, minorities, and persons with disabilities http://purchasing.umn.edu
  - Non U-Wide Suppliers

- Determine which Contract for Professional Services type to create and when work can begin.

<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Dollar Amount</th>
<th>When Work Can Begin</th>
</tr>
</thead>
<tbody>
<tr>
<td>QCPS</td>
<td>Quick Contract for Professional Services</td>
<td>*$0 - $49,999</td>
<td>Work can begin after all University approvals are applied and the contract is dispatched to supplier.</td>
</tr>
<tr>
<td>CPS</td>
<td>Contract for Professional Services (CPS)</td>
<td>$50,000 or more</td>
<td></td>
</tr>
<tr>
<td>PCPS</td>
<td>Performance Contract for Professional Services</td>
<td>*$0 or more</td>
<td></td>
</tr>
</tbody>
</table>

*Note: For a professional service less than $3,000, a non-PO voucher may be created if the department or supplier does not desire a contract. The following professional services always require a contract at any dollar amount:
- Legal services
- Construction project management, architect and engineering, and design services
- Services from audit and accounting services

- Collect and complete required forms, per contract type, according to University Policy. See the Purchasing Services website for further explanation and definition.

<table>
<thead>
<tr>
<th>Required Forms</th>
<th>QCPS</th>
<th>CPS</th>
<th>PCPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services Information Sheet (PSIS)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Statement of Work (SOW)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Performance Agreement</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Request for Exception to Board of Regent’s Policy Form <em>(if applicable)</em></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Nonresident Alien Data Collection Worksheet <em>(only applies to foreign suppliers)</em></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
</tbody>
</table>
Contract for Professional Services Checklist (cont.)

☐ Verify Supplier data is correct and current.
  ☐ Navigate to Main Menu > Suppliers > Supplier Information > Add/Update > UM Review Suppliers.
    a. Enter the name of the supplier in the Name field.
       • Search on a singular field such as Name, Address, State ID Number, or use a combination of search criteria.
    b. Click <Find>.
    c. Review the search results.
       • If the supplier cannot be found, the supplier must be set up. Refer to the “Request a New Supplier or Change an Existing Supplier” section in the Create Requisitions reference manual.
       • If supplier is found, click on the supplier detail icon.
    d. Verify the supplier information is accurate, then click <Return>.

☐ Populate Requisitions Settings.
  ☐ Navigate to Main Menu > eProcurement > Requisitions.
  ☐ Click <Requisition Settings>.
    • Populate specific field(s) that will be applied to the overall requisition such as: Requisition Name, Supplier (if applicable), Category (if applicable), Unit of Measure, Ship To, and Accounting Defaults. These fields can also be populated within the specific contract requisition. See descriptions of these fields in the Create Requisitions reference manual.

☐ Click <Other Purchases - CPS> to create the contract.
  a. Verify the fields that were entered into Requisition Settings: Supplier, Category, and Unit of Measure. If necessary, modify field(s) on the requisition directly.
  b. Enter the following fields: Description, Price, and, if applicable, the Quote Number and Quote Date. See descriptions of these fields in the Create Requisitions reference manual.
  c. Additional Information: This field contains “line level” comments. It can be populated here or on the Checkout – Review and Submit page. Review the instructions on line level comments later in this checklist. Click <Add to Cart> for each item.
  d. Click <Add to Cart>.
  e. Add additional items as needed or click <Checkout>. 
Contract for Professional Services Checklist (cont.)

- **Checkout – Review and Submit page**
  - **Requisition Summary section**
    - a. Verify Requisition Name is populated.
    - b. Enter Start Date and End Date.
    - c. Click <Contract Administrator> and populate information.
  - **Cart Summary section**
    - a. Click <Add> to enter comments specific to the “line level” on the requisition. Comments pertaining to the specific line such as explanation of rate or expenses must be added on the line level. Check Send to Supplier, Show at Receipt, and Show at Voucher as applicable.
    - b. Verify the fields that were entered into Requisition Settings: Ship To and Accounting Defaults. If necessary, modify field(s) on the requisition directly.
  - **Shipping Summary section**
    - a. Requisition Comments and Attachments: Comments put in this field are called “header” comments, as they apply to the entire contract.
    - b. <Add More Comments or Attachments> must be used to add attachments, if applicable. For header comments, use only one attachment per comment. See the Create Requisitions reference manual for a list of required forms for contracts. Check Send to Supplier, Show at Receipt, and Show at Voucher as applicable.
c. **Approval Justification:** In accordance with the Justification Standards policy, provide the justification for requisition in this field. Include the 5 W’s (Who, What, Why, When, Where).

- Click <Save and Submit> after data has been entered to route for approval.