Using the Contract Request Form – Contract Requestor

This job aid covers how to create, find, track, and submit a Contract Request. Additionally, there is information on how to tie an iBuy Requisition to the Contract Request.

The Contract **Requestor** role is required to create a Contract Request Form.

A Contract Request Form allows department users to submit a request to a Contract Office when a contract is needed or to amend an existing contract.

As a Contract Requestor, you will complete fields and answer questions on the Contract Request Form and submit it for approval. Once the request is approved, the Contract Office will begin processing the contract.

When Help Text is available for a field, there is a question mark icon that can be clicked for more details.

How to Submit a New Contract Request

1. Navigate to **Contracts** > **Requests** > **Request Contract** (located on left side of iBuy home page).
2. Complete the required fields in the pop-up **Create Contract Request** window:
    a. **Contract Request Name** - Enter a name for the Contract Request. Keep in mind this name may be carried over and used on the actual contract.
        i. **NOTE**: Please use the following format when creating the Contract Request name: **[Contract Category (options are Payable, Receivable, Hybrid or No Funds)] – [Requesting Unit] – [Other Party Name]**.
        ii. Example: Payable – College of Vet Med – Clean Uniform Company
    b. For **Select a Contract Request Template**, **Contract Request Form** is selected by default.
3. Click **Submit**.
4. The Contract Request opens to the **Instructions** page, which provides information regarding the Contract Request. Review this information.
5. Click **Next**.
6. The **Details** page displays the Contract Request name from the previous page, template, and the description. At this time, you may correct and/or update the Contract Request Name. Otherwise, it defaults to the name given on the previous step.
7. Click **Next**.
8. Add **Attachments** and supporting documentation to include in the Contract Request.
    a. If using an **Other Party Contract**, attach the other party's contract as an attachment and respond to the **Document Source** field with the selection of Other **Party Contract**.

9. Click **Next**.
10. The Contract Request opens to the **Instructions** page, which provides information regarding the Contract Request. Review this information.
11. Click Next.
12. The **Details** page displays the Contract Request name from the previous page, template, and the description. At this time, you may correct and/or update the Contract Request Name. Otherwise, it defaults to the name given on the previous step.
13. Click **Next**.
14. Add **Attachments** and supporting documentation to include in the Contract Request.
    a. If using **an Other Party Contract**, attach the other party's contract as an attachment and respond to the **Document Source** field with the selection of **Other Party Contract**.
15. Click **Next**.
    a. Will you be using the Contract for Procurement of Supplies and Services template?
        i. If **Yes** - There are additional questions to answer if the **Contract for Procurement of Supplies & Services Template (POSS)** is going to be used to draft the requested contract.
            1. **NOTE**: If you are using the **Contract for Procurement of Supplies and Services (POSS)** template, Contracts+ will automatically build a contract with the information you provide on the contract request and there is NOT a need to attach a filled in POSS template.
            2. Leave **Exhibits B-I** blank if unknown. Your Contract Office coordinators will fill these in.
        ii. If T**emplate No Changes** or **Template With Changes** was selected and you are using a template other than the POSS, select **No**. Refer to 8a above, attach the contract template.
        iii. If **Other Party Contract** was selected, select **No**.
        iv. **NOTE**: If you are requesting a contract utilizing the POSS template, you do not need to attach a template contract. The system will automatically create a contract using the information that was given in the Contract Request.
    b. **Summary/Description of Goods/Services** – Provide a detailed description of the supplies/services to be provided.
    c. **Deliverable/Work Product** – Deliverables and work product may include any reports, materials, supplies, design specifications and drawings, or construction related activities incidental to or resulting from the services to be delivered to or by the University under this contract.

d. **Start and End dates** – Intended to reflect the beginning and end date of the contract term.

e. **Update Start Date Upon Execution** – Select the box if you want the contract term to begin at contract execution.

f. **Renewal Term and Renewals Remaining** – Complete information if renewals are applicable to your Contract Request. Leave blank if these are not applicable.

g. **Is individually identifiable health information exchanged, shared, or received?** – Select **Yes** or **No**.

h. **Sharing or transfer of personal data?** – Select **Yes** or **No**.

i. **Other Comments & Considerations**.

j. **Vendor providing licensing or credentialing services?** – Select **Yes** or **No**.

k. For GASB87, **there is a leasing component involved in this contract that is 12 months or more including renewal options**. – Select **Yes** or **No**.

16. Click **Next**.

17. The **Financial & Purchasing Info** page gathers department level details.

a. Chart

b. **Organization Code** – This must be six digits.

c. Fund

d. **Amount** – List the maximum amount of the Contract Request.

e. Rate of Compensation/Additional Payment Details

i. Examples: "Lump sum payment" or "$35/hour"

f. Method of Procurement – Not applicable for revenue or no funds contracts.

g. **Requisition Number** – If you are creating an expenditure contract (Contract Category – Payable or Hybrid), you will need to create an iBuy Requisition. If you have already created a requisition using an iBuy Requisition Form, please enter the number in this field.

i. If the requisition is NOT already created, click **Save Progress** to save all the data that has been entered in the request form so far.

1. Make note of the Contract Request Form Number.

2. Using the iBuy Requisition Form to create the associated requisition.

3. Select **Yes** to **Does this purchase require a contract to be signed by the University or must the University agree to the supplier's Terms & Conditions?** This will automatically route your requisition to your Contract Office.

4. Enter the Contract Request Form Number on the iBuy requisition within **Internal Notes and Attachments** in the **Contract Request Form Number** field.

5. Once the iBuy requisition has been submitted, you can find the saved request form from the left side of the page by navigating to **Contracts** > **Requests** > **My Contract Requests**.

6. Continue from where you left off on the Contract Request Form, add the **Requisition Number** on the **Financial & Purchasing Info** section.

h. **Bulletin Procurement Number** – Enter for a solicitation.

18. Click **Next**.

19. The **Second Party Questions** page gathers information about the individual or organization that the University is entering into the agreement with.

a. If the Second Party **DOES** exist in the system, select **Yes.**

i. Provide information into each field regarding the Second Party.

b. If the Second Party is **NOT** available in the system when you search for the name:

i. Select **No** to the question, **Does the Second Party exist in the system, based on the second party field above?**

ii. Click **Save Progress** to save all the data that has been entered in the request form so far.

iii. Copy the provided URL within the form to complete a Vendor Information Form (VIF) for the Second Party. Complete the form and send to the Second Party for completion and submission.

iv. You will be notified when the second party is in the system and ready for use. You may continue with the saved Contract Request Form.

v. Locate the saved Contract Request Form by navigating to **Contracts** > **Requests** > **My Contract Requests**.

vi. Continue from where you left off and complete the details by searching for the newly implemented **Second Party**.

c. Enter any details about **Foreign Entity Reporting**.

i. If **Yes** is selected, complete the fields regarding Second Party, including any details about **Foreign Entity Reporting**.

20. Click **Next.**

21. On the **Unit Questions** page gathers information for the Unit submitting the Contract Request Form.

a. Complete the unit specific questions.

22. Click **Next**.

23. The **Review and Complete** page will indicate warnings if data is missing from a section of the form.

    a. If you have any incomplete section(s), click the section from the left side of the form, populate the required missing data, and click **Save Progress**.

    b. When all sections are complete, click **Review and Complete** from the left side of the form.

24. Click **Complete Request**.

25. You will be prompted with a pop-up box asking, "**Are you sure you are ready to complete your new contract request?**" Click **Yes** or **No**.

    a. **NOTE**: Once you submit the Contract Request, the status will show **Under Review**.

How to Track Your Contract Request After it is Submitted

To track the status of your submitted request, go to the left side and navigate to **Contracts** > **Requests** > **My Contract Requests**.

1. Click on **Filter Contract Requests**. By default, all Request Statuses are selected.

    a. Select the checkbox next to each status that applies to the Contract Request(s) that you want to display.

    b. Click **Apply**.

    c. A list of Contract Requests that match the filter criteria are displayed.

2. Click the Contract Request name under the **Contract Request Name** field or click **Actions** > **View** from the far right of the page to open the request.

    a. Depending on the status of the Contract Request, you may also have the option under **Actions** to **Delete** the request.

3. Once you have selected the specific Contract Request to view, on the top left side of the form the **Form Number** is provided (Your Request), **Request Status** and the **Contract Number**, when a contract has been created off the Contract Request.

4. To check status details, click **Contract Request Workflow** on the left side of the Contract Request Form. If the **Contract Request Assignment** queue has a name listed, then it has been assigned to a Contract Approver in your Contract Office to process and the status of the request will be **Approved** and **Completed**. If the queue is not in **Approved** status, then the request is waiting to be assigned to a Contract Approver.

5. During the approval stage of the Contract Request the Contract Approver may request more information using the **Discussion Page**.

How to Use the Discussion Thread on a Contract Request

As a Contract Requestor, you may initiate a discussion with the person assigned to your request or you may receive a Discussion Thread system notification or email notification from the assigned approver.

Start a Discussion Thread

1. Navigate to **Contracts** > **Requests** > **My Contract Requests**.
2. Click **Filter Contract Requests**.
3. Select the checkbox next to each status that applies to the Contract Requests that you want to display.
4. Click **Apply**. A list of Contract Requests that match the filter criteria are displayed.
5. Click the Contract Request name to open the request.
6. In the left menu, select **Discussion**.
7. Click the **Start New Thread** button to begin a discussion thread on a Contract Request.
    a. You will be unable to start a new thread if the Contract Request is in **Approval** status.
8. Enter a subject title for the discussion message in the **Subject** field.
    a. **NOTE**: If there is more than one discussion on a Contract Request, the **Subject** line for each message is displayed under the Topics heading.
9. Enter the text of the Contract Request message in the **Message** field.
10. Click the **Add Attachments** button to add files or links to the Contract Request message.
11. Click **Post Message** to display a message on the Discussion page.
12. Click the **Edit** button to change the text of a Contract Request message or reply.

Reply to a Discussion Thread

1. Navigate to **Contracts** > **Requests** > **My Contract Requests**.
2. Click **Filter Contract Requests**.
3. Select the checkbox next to each status that applies to the Contract Requests that you want to display.
4. Click **Apply**. Contract Requests that match the filter criteria are listed.
5. Click the contract request name to open the request.
6. In the left menu, select **Discussion**. The **Discussion** page opens.
7. Click the **Reply To This Thread** button on a Contract Request message to add a reply to it.

8. Enter the text of the Contract Request message in the **Message** field.

9. Click **Post Message**.

How to Submit an Amendment to a Contract

To amend an existing contract, the Contract Requestor should create a new Contract Request. You will need the original contract number to enter into the Contract Request Form.

It is advised to have the original submitted Contract Request details pulled up on one iBuy screen while you create a second request to amend. This ensures all the data is entered the same except for what needs to be amended. To open a new window of iBuy, right click within the University logo on the top left part of the screen. Click open in new tab or open in new window.

All the previously detailed steps within the above section, **How to Submit a New Contract Request**, should be followed except for:

- **Contract Request Name** will follow this format: **Amendment – [Contract Category]** – **[Requesting Unit] – [Other Party Name]**. The name should be the same as the original request with the addition of word "Amendment".
- In the **General Info** section, select **Amendment** to the question I***s this Request for a New Contract or Amendment?*** Enter the **Contract Number to Amend**. The Contract Number can be found in the shaded area in the top left corner of the original Contract Request.
- In the **General Info** section, under **Summary/Description of Goods/Services**, describe what needs to be amended (for example "Amendment to renew the contract for July 1, 2022 to June 30, 2023").
- Attach the proposed amendment, if available, under **Attachments**.