Create a Requisition

Contract for Professional Services Checklist

I. Verify which type of CPS requisition will be created.
   A. **Voucher Contract for Professional Services (VCPS):** For all professional services under $3,000.
   B. **Quick Contract for Professional Services (QCPS):** For professional services between $3,000 and $49,999.99.
   C. **Contract for Professional Services (CPS):** For professional services $50,000 or greater.
   D. **Performance Contract for Professional Services (PCPS):** For entertainers/performers $3,000 or greater.

II. Determine which supporting documentation must be attached in the requisition.
   A. **Professional Services Information Sheet (PSIS)**
      - Required for all sponsored professional services requisitions and required on all nonsponsored professional services requisitions valued at $3,000 and above.
   B. **Statement of Work**
      1. Required for ALL types of professional services requisitions.
      2. Negotiated between University and supplier.
      3. Communicates scope of the work and sets clear expectations.
   C. **Nonresident Alien Data Collection Worksheet**
      - Required for all VCPS, QCPS, PCPS, and CPS requisitions with a foreign national supplier.
   D. **Performance Agreement**
      - Required for all PCPS requisitions.
   E. **Exception to Regents Purchasing Policy**
      1. Required if CPS is $50,000 or greater and only one supplier can provide the service.
      2. Must be completed and submitted to Purchasing Services. Attach the form in the requisition Comments and Attachments section.

III. Determine when the work can begin.
   A. **Voucher Contract for Professional Services (VCPS)**
      - Approvals are not required in the financial system prior to the start of the work, as the requisition is typically created after the service has been rendered and the invoice received. *Reminder: VCPS is NOT a legally binding contract. Rather, it creates a voucher for payment.*
Contract for Professional Services Checklist (cont.)

B. Quick Contract for Professional Services (QCPS)
   • Work can begin after all University approvals are applied and the contract is dispatched to supplier.

C. Contract for Professionals Services (CPS)
   • Work can begin after all University approvals are applied and the contract is dispatched to supplier.

D. Performance Contract for Professional Services (PCPS)
   • Work can begin after all University approvals are applied and the contract is dispatched to supplier.

IV. Verify the supplier’s data is correct and current.

A. Home > Suppliers > Supplier Information > Add/Update > UM Review Suppliers
   1. Enter the name of the supplier in the Name field.
      a. The search capability is very powerful. Search on a singular field such as Name, Address, State ID Number, or use a combination of search criteria.
   2. Click <Find>.
   3. Review the search results.
      a. 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.
   4. Identify the correct supplier and click on the supplier detail icon.
   5. Verify the supplier information is accurate, then click <Return>.

V. Create the requisition.

A. Navigate to: Home > eProcurement > Create Requisition. Click the <CPS> option.

B. For all professional services requisitions, enter the following required fields:
   1. Description (e.g., communications consultant for staff retreat)
   2. Quantity
   3. Unit of Measurement (e.g., “Lot” or “Day”)
   4. Price
   5. Category: Ensure the proper category is selected as it drives reporting, the account ChartField value, and, in some cases, the type of contract to be created.
   6. Optional fields (use only if applicable): Quote Number and Quote Date.
7. Additional Information section: Describe the payment forms, dates of service, etc.
   - Determine who sees the information by selecting the appropriate checkbox(es): supplier, receiver, and/or voucher preparer.

8. Click <Add to Cart>.
   - If more services are needed, enter the required field information for that line repeating the steps listed above. If no more services are needed, click <Checkout>.

VI. Verify and/or complete the following information on Checkout - Review and Submit page (for all requisition types):

A. Requisitions Summary section
   1. Requisition Name (titles the requisition).
   2. If a VCPS, the supplier’s Invoice Number and Invoice Date are required.
   3. If a QCPS, CPS, or PCPS, Contract Administrator information is required.
   4. Start and End Dates (as negotiated with the supplier)
   5. Supplier ID: If bidding is required, leave blank.

B. Cart Summary section is where Ship To address and ChartField values can viewed/edited.
   1. Requisition Lines: Verify each requisition line is correct. If edits are needed, click the blue link below the Item Description. If more items need to be added, click <Add More Items>.
   2. Ship To: Enter P + DeptID (e.g., P10980) and then click the lookup icon. Select the appropriate delivery location.
   3. Enter ChartField values.
      a. To view/edit an individual line: Click <Expand Row>.
      b. Enter the ChartField information.
      c. To split cost of line across two or more ChartFields.
         i. In the Accounting Lines section, scroll to far right and click the “+” icon to add a second row. Repeat if needed to add more rows.
         ii. Scroll back to the left and click the <Show All Columns> icon to add more fields to the row(s). Fill in ChartField information for each row.
         iii. Scroll back to the right and fill in the Percent field with split amount.
C. **Shipping Summary section**

1. **Requisition Comments and Attachments** field. Comments put in this field are called “header” comments and are printed on the purchase order. Information about discounts, shipping, freight, and deliveries pertaining to whole order should go in this field.

2. `<Add more Comments or Attachments>` link. For example:
   a. Professional Services Information Sheet (if applicable; Do Not Send To Supplier)
   b. Statement of Work (for all types; Send to Supplier)
   c. Performance Agreement (for all PCPS)
   d. Exception to Regents Purchasing Policy: if $50,000 or greater and sole supplier (Do Not Send to Supplier).
   e. Nonresident Alien Data Collection Worksheet (for all types with a foreign national supplier; Do Not Send To Supplier)

3. **Approval Justification** field. In accordance with the Justification Standards policy, provide the justification for requisition in this field. Include the 5Ws.

VII. After all data has been entered and verified, click `<Save and Submit>`.