UVAFinance



Contract Requests Quick Reference Guide

Contract Requests

This Quick Reference Guide (QRG) is designed to walk department users through submitting a Contract Request. A Contract Request should be submitted when you need a contract reviewed and signed by Procurement & Supplier Diversity Services (PSDS) **and** you do not a need a Purchase Order (PO) issued to a supplier. This happens if you are either paying using a T&E card or there is no cost associated with the contract.

Once submitted, a PSDS team member will action your request, and follow up with you and the vendor via email. If you have a question regarding the status of your submission, please reach out to <u>askfinance@virginia.edu</u>.

Procedure

1. Log in to UVA Marketplace.

A				Al •	Search (Alt+Q) 0.0	00 USD 🗑 🗢 🔽 🗸
Simple Advanced			Go to	Non-Catalog Item Favorite	s Forms Shop Quick Order	Browse: Suppliers Categories
Bearch for products, suppliers, forms, part number, etc.						٩
9						Exit UVa Marketplace
n NEWS	COVID-19					v
Updated 04/011/2022 ATTENTION MARKETPLACE USERS: Effective 04/11/2022 a NeW PURCHOUT is available for Encompass!	PSDS Supples Guide	PSDS Supples Listing	PSÖSTAQI	UVA Updates		
You can access this punchout from the Maintenance/Industrial section of the homepage.	Resources					··· ¥
Effective April 15, 2022, Linde's punchout catalog will have a 5.0% Increase for all gases. This increase is in line with the process detailed in their UVA agreement.	Paymention	UVA Commette	Furchasing Forms	Procurement Training	Invoice Status Lookup	Goods & Services Guide
Praxair has been rebranded under Linde. You will see a new supplier logo on the punchout tile. The offerings of the punchout have not changed.						
The ability to do a supplier add/change request has been turned off as the Procurement Team prepares to transition to a new supplier registration platform. If you have any concerns or nuestions plasses	Guidelines & Exemptions	Expenditure Type Search	FUC/ DLC Search	*2HA82	Information Security & FAQ	FST Project

Navigate to Request Contract from the UVA Market Place Home screen by:

- 2. Navigate through Contracts:
 - a. Select the Contracts icon.



b. Select **Requests** from the dropdown menu.



- 3. Navigate by Search bar:
 - a. Click on the Magnifying Glass icon on the bottom left of the Marketplace Home screen.



b. Enter in Request Contract and select the Request Contract option.

	is been rebranded under Linde. You the punchout tile. The offerings of the spanged	
Menu Search (Alt	+M)	
Request Contract		ed off as Q pplier
Request Contract	Contracts -> Requests	s please ; please
Search Contract Reque	ests Contracts -> Requests	
My Contract Requests	Contracts -> Requests	5
Requests Ready for Co	ntract Creation Contracts -> Requests	5

- c. Enter in a name for your Contract Request.
- d. Select Apply.

Create Contract Request				
Contract Request Name * Select a Contract Request Template *	Hotel Agreement UVA Contract Request × Q			
a * Required	Apply Close			

On your **Contract Request** screen:

- 4. Read through the Contract Request Instructions.
- 5. Select Next.

Back to My Contract Requests	
Hotel Agreement	Instructions
Form Number: 681783 Request Status: Incomplete	1. Add attachments as applicable, including: • Current document for review & signature
Instructions	 Other applicable docs (competing quotes, historical POs, previous agreement, etc.)
Details	 Do you need a PO to accompany this request? If yes, the proper procedure is to submit a requisition in Workday. Completion of this form will not result in the issuance of a PO.
Attachments O	3. If you need assistance with this request, please contact askfinance@virginia.edu, and include the subject line "Contract Request Form"
Questions 🗸	
Review and Complete	
Discussion Contract Request Workflow	Next >

On the **Details** screen:

- 6. **Contract Request Name** Auto-populates with the name on your Contract Request. Update the name as needed.
- 7. Select Next.

Hotel Agreement	Details		🖨 Print Request History ?
Form Number: 681783 Request Status: Incomplete	Contract Request Name *	Hotel Agreement	1
Instructions	Template	UVA Contract Request)
Details	Contract Type	UVA Agreement	
Attachments O	Description	Contract Request Form – No PO	
Questions 🗸			
Review and Complete			
Discussion			
Contract Request Workflow			
			Previous Save Progress Next >

On the Attachments screen:

- 8. Attach any necessary documents, including the contract/document needing a signature, or any other quotes, previous agreements, etc.
- 9. Select Next.

K Back to My Contract Requests			
Hotel Agreement	Attachments		Print Request History ?
Form Number: 681783 Request Status: Incomplete	Add Attachments		
Instructions	✓ Request Attachments		
Details	Attachment	Size	Actions
Attachments 1	Ł Hyatt Agreement.docx	11 KB	Actions 🔻
Questions 🗸			
Review and Complete			
Discussion			
Contract Request Workflow			
			Previous Next >

On the **Questions** screen:

10. Complete the following fields:

a. **Payment Method** – Confirm if this contract will be paid using a Travel & Expense Card, or if this type of request does not require a payment





UVAFinance - Procurement

- b. Supplier Name Enter the supplier's name as it is displayed in Marketplace, if applicable. If the supplier is not registered, enter the name as displayed on the contract, or enter "N/A" if a supplier is not needed for the request.
- c. **Supplier Contact/Email Address/Phone Number** Enter in the name, email address, and phone number of the supplier or party that the contract is with that is best to be listed on the contract.
- d. UVA User ID/Email Address Enter in the user ID of the UVA person that is the best contact to be listed on the contract for the buyer and supplier.
- e. Type of Purchase Select the type of contract being requested.
- f. **Description of Request –** Provide a short description of the contract being requested.
- g. Total Projected Cost of Contract Enter in the dollar amount range you expect the contract to be. If a contract amount is not applicable, select \$0 \$10,000.
- h. Attachment Confirmation Review and confirm that you attached any necessary documents on the Attachments tab.

11. Select Next.

On the Review and Complete screen:

a. Select **Complete Request** when all the sections have a green check mark. This will submit your request for approval!

Back to My Contract Requests			
Hotel Agreement	Review and Complete		Print Request History ?
Form Number: 681783 Request Status: Incomplete	 Required fields complete 		
Instructions	Section	Progress	
Details	Instructions	No Required fields	
Attachments 1	Details	No Required fields	
Questions 🗸	Attachments	No Required fields	
Review and Complete	Questions	 Required fields complete 	
Discussion Contract Request Workflow			
	★ Required		Previous Complete Request

On the **Confirm** screen:

b. Select Yes to confirm you would like to submit the contract request.



			1000 100011	L OOHUC	act Request.				
OTE		-							
1	🕆 🚽 🖓 🖓	ARKETPLACE			viii ocaron (vii	Q Q	456.20 USE	> ₩ ♥	91
	Contracts > Requests	 My Contract Request 		uccess ract Request S	ubmitted				
2			Policy effective May		losing this banner, you :	acknowle lge th	at when you use ou	r Solution, we pro	cess your
-		anon-us desended i	roa-ocifice rilliacj	, i onej.					
	My Contract	Requests							
	Eilter Contract B								
-	 Filter Contract F 	Requests						Create New Cor	tract Request
									10 Per Page 1
Ĩ		Page 1 of 2	1-10 of 14 Results	5					-
			1-10 of 14 Results			Workflow	Status Last		
	Contract Request Name		1-10 of 14 Results Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
3	Contract Request			Request	Workflow Step			Created 5/16/2022	Actions T