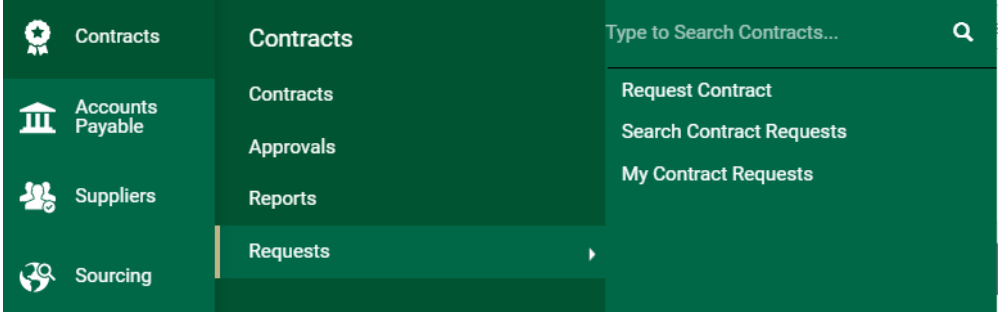




Purpose:	This section outlines the steps necessary to create a Contract Request for review and approval.
Navigation:	Navigate in Bull Marketplace > Contracts >Requests > Request Contract
Notes:	Only Requestors and Approvers can submit a Contract Request. If an Approver submits, another Accountable Officer needs to be identified as the Contract Approver.
When to Use this form:	A NEW Contract is requested when the following situations are met: <ol style="list-style-type: none">1. This is the first contract you are submitting with a supplier.2. An existing BMP contract has expired or is due to expire and:<ol style="list-style-type: none">a. The existing contract does not mention or allow for a renewal.b. The new contract you are submitting does not reference the existing contract (extension or modification of)3. The contract existed in the old CMS contract system of service now and is being entered into BMP for the first time

Steps	Instructions
1	<p>In the Contract flyout menu > Go to Contracts > Requests > Request Contract</p> 
2	<div data-bbox="386 548 1149 1045"> <h3>Create Contract Request</h3> <p>Contract Request Type ★</p> <p> <input checked="" type="radio"/> Create Contract <input type="radio"/> Amend Contract <input type="radio"/> Renew Contract </p> <p>Contract Request Name ★</p> <p>Select a Contract Request Template ★</p> <p>★ Required</p> <p>Submit Close</p> </div> <div data-bbox="1179 600 1495 957" style="border: 1px solid black; padding: 5px;"> <p>Select Create Contract</p> <p>Give the request a name</p> <p>The template will default as there is only a single template and hit submit</p> </div> <p>NOTE: The Contract Request Name is for internal department reference only and will NOT carry forward to the Contract Record. There is no preferred naming convention. Procurement will use only the Contract Request Form Number or Contract Record number to reference Contracts in BMP.</p>

3 The Contract Request will be created. Allow the wizard walk you through the process. Click “Next” Below.

Rocky Bull Agreement Print Request History ?

Form Number: 920281
Request Status: Incomplete

Instructions

Details

Attachments 0

Questions ✓

Header Information ✓

Departmental Information ✓

Background Information ✓

Supplier Contact Informat... ✓

Funding Information ✓

Sourcing Information ✓

Review and Complete

Discussion

Contract Request Workflow

Instructions

A NEW Contract request is used when:

1. This is the first contract you are submitting with a supplier
2. An existing BMP contract has expired or is due to expire and either:
 1. The existing contract does not mention or allow for a renewal
 2. The new contract you are submitting does not reference the existing contract in any way to indicate it is being modified, extended, etc.
3. The contract existed in the old CMS/Service Now contract system and is being entered into BMP for the first time (this should be rare)

The use of diverse suppliers is strongly encouraged and required for competition. You will be asked to provide documentation on the good faith effort to engage diverse suppliers.

For additional assistance in locating potential diverse-owned suppliers, please visit the Office of Supplier Diversity's website or by searching the Supplier database in the Bull Marketplace by running an Advanced Search for Company Classification.

Next >

4 **DETAILS:** Review and update (if necessary) the name of your Contract Request. When finished, Click “Next”.

[Back to My Contract Requests](#)

Test contract

Form Number: 442208
Request Status: Incomplete

Instructions

Details

Attachments 0

Questions ✓

Details

Contract Request Name *

Template USF Contract Request Form

Contract Type -

Description -

5 **ATTACHMENTS:** Attach all relevant documents for your request for Procurement to review. Examples include: Supplier contract or quote, Competitive Quotes, Exemption Justifications (if applicable), and other additional information. When finished, Click “Next”.

[Back to My Contract Requests](#)

Test contract

Form Number: 442208
Request Status: Incomplete

Instructions

Details

Attachments 0

Questions ✓

Attachments

Add Attachments

6

QUESTIONS: Summarizes the completeness of sections of your request. When all sections are complete you may submit your request. Click **“Next”**.

Questions

Overview	Progress
Header Information	<input checked="" type="checkbox"/> Incomplete
Departmental Information	<input checked="" type="checkbox"/> Incomplete
Background Information	<input checked="" type="checkbox"/> Incomplete
Supplier Contact Information	<input checked="" type="checkbox"/> Incomplete
Funding Information	<input checked="" type="checkbox"/> Incomplete
Sourcing Information	<input checked="" type="checkbox"/> Incomplete

7
a

HEADER INFORMATION:

Questions - Header Information

▼ On This Page

- Header Information (8)
- Contract Summary (1)

▼ Header Information

Contract Name *

Supplier *

Additional Second Parties

Is this contract a Master Service Agreement or Subject to the terms of an existing Master Service Agreement? If so, please provide contract number. *

Is this request related to an event for which a contract request or contract record has already been created? (ex. A hotel agreement for meetings rooms has been executed and this is a request for catering or AV support for the same event)

Yes No

Contract Name: Should be comprehensive. This will transfer to the Contract Record and may be used as a search field.

Supplier: Select the supplier from our Supplier database. If the supplier is not found you will be prompted to submit a NEW Supplier Request. If there are duplicate records, select the one that is active and in-network.


Additional Second Parties: optional field. University of South Florida is the First Party. The Supplier is the Second Party. Complete this section ONLY if there is another Second Party associated with the contract.


Master Service Agreements govern legal terms of business between USF and Suppliers. You can search for existing MA's or ask a Contract Facilitator if you aren't sure if one will apply.


If you are organizing an event where multiple contracts are needed, for example, a conference where venue, catering and AV are provided by different suppliers, we can link these contracts together for you to help track the Contracts and we can assign them to the same person for consistent management.


7b

Start and End Dates: This information should be found in the contract document. If no specific start date is provided it is presumed the contract will start upon execution so, check off the box "Update Start Date Upon Execution". It is only certain situations we allow Contract to not have an expiration date. If one is not clear from the contract, provide your best guess or set the date to 1 year.



Start Date * 

 Update Start Date Upon Execution 

End Date * 
 Expires On No Expiration Term

Total Contract Value * 


Contract Summary
Provide a comprehensive description of the nature of the contract (scope of work), the purpose of the agreement, and how the contract will benefit/serve the mission of USF.

Summary * 
No Text Entered 

Contract Summary: Should be a comprehensive summary as to the nature and purpose of the Contract.

★ Required

Renewal Terms: Selecting an expiration date or term will prompt additional information on renewals. This section should only be completed **IF THE CONTRACT EXPRESSLY OUTLINES RENEWAL TERMS**. If you are unsure about how to complete these questions, please leave the section blank or ask the assigned contract facilitator if you are interested in establishing renewal terms. Renewals are a fast and easy way to extend services on an annual basis. USF will not agree, in more cases, to automatic renewals.

End Date * 
 Expires On No Expiration Term

Auto-Renew
 Yes No
Renewal Term

Renewals Remaining

8

DEPARTMENT INFORMATION: Complete the required fields according to the guidance below. When complete Click **“Save Progress”** and **“Next”**

Questions - Departmental Information

Print Request | History ?

On This Page

- Department Approving Officer Information (4)
- Primary Contact (2)
- Other Stakeholders (2)

Department Approving Officer Information

6 Digit Department ID *

Field Validation

Full Department Name *

Department Approving Officer Name *

Department Approving Officer Email *

6-Digit Department ID: GEMS Department ID provided in the format 000000

Full Department Name: Provide full department, unit, or institute name. Avoid the use of acronyms.

Department Approving Officer Name and Email: This is typically a unit head, or fund accountable officer who will review the contract and permit Procurement to obligate the funds necessary for the contract. It is the department’s responsibility to provide accurate information and to keep Procurement informed of changes to these officers.

Primary Contact

Primary Contact Name *

Primary Contact Email Address *

Primary Contact Name and Email: This is typically the unit or department employee who is submitting the contract request. This person will be the first contact for Procurement for questions related to the contract request.

Other Stakeholders

Are there any other USF employees that need to view this contract and

Yes No

Please list all USF stakeholder names and email addresses, separated by

2000 characters remaining

Other Stakeholders: Stakeholders have a vested interest in the contract and/or may be the service user. Stakeholders will receive status updated on the Contract Record. If “YES” is selected, a text box will appear to list all stakeholders. Accountable officers and Primary Contacts do not need to be listed.

★ Required

Previous

Save Progress

Next

9

BACKGROUND INFORMATION: Complete the required fields according to the guidance below. When complete Click **“Save Progress”** and **“Next”**

NOTE: Your selection will determine the guidance that is given. Follow the arrows on the diagram below for more information on each of these conditions.

NOTE: Some purchases require additional approvals prior to purchase. These approvals should be obtained prior to creating the Contract Requests. Proof of approval should be added to the attachments section.

NOTE: Additional information is not required if the contract is between USF and an independent contractor.

Questions - Background Information

[Print Request](#) | [History](#) | [?](#)

Background Information

Please check all appropriate boxes

Construction or Renovation of Tampa grounds/buildings

Involves HIPAA/FERPA Information

Involves use of USF Logo, and/or advertising/marketing services greater than \$50,000

None of the Above

Services Provided by an Independent Contractor

Non-standard technology requiring UTSB approval

Please provide the Space Impact Approval Number from Facilities Management *

Please attach a PDF copy of email to and from UCM containing acknowledgement and approval of this purchase. *

I confirm that I have uploaded approval in the Attachments section.

Please provide the approved UTSB form number from Bull Marketplace * ?

Has a BAA been requested or executed related to this purchase request? * ?

Yes No

★ Required

< Previous

Save Progress

Next >

10

SUPPLIER CONTACT INFORMATION: Complete the required fields according to the guidance below. When complete Click **“Save Progress”** and **“Next”**

NOTE: Providing the correct signature authority will greatly increase the speed at which your contract is processed. Ask your supplier representative for this information during your quote collection.

Questions - Supplier Contact Information

[Print Request](#) | [History](#) | [?](#)

On This Page

Supplier Contact Information (4)
Supplier Signatory Information (4)

Supplier Contact Information

Supplier Contact Name *

Supplier Contact Position or Title *

Supplier Contact Primary Phone Number *

Supplier Contact Primary Email Address *

Supplier Contact Information: Typically the sales representative or supplier employee who has provided the quote, but may be the company owner or contract reviewer. This will be the first point of contact Procurement will use for contract negotiation.

Supplier Signatory Information

Provide contact information for the supplier representative with the authority to sign the contract. It is the responsibility of the department to provide contact information for the supplier signatory. Incorrect or missing information may result in delay of contract execution. The supplier representative should be able to confirm the signature authority for their business.

Supplier Signatory Name

Supplier Signatory Position or Title

Supplier Signatory Primary Phone Number

Supplier Signatory Primary Email Address

Supplier Signatory Information: This is the supplier's representative with the authority to sign a contract on behalf of the supplier. It may or may not be the same person who provided the quote. Providing this information greatly expedites the signature and negotiation process.

★ Required

◀ Previous

Save Progress

Next ▶

11

FUNDING INFORMATION: Complete the required fields according to the guidance below. When complete Click **“Save Progress”** and **“Next”**

NOTE: Departments should refer to the **USF Expenditure Matrix** to ensure the purchase is allowable and allocable to the funding source indicated.

NOTE: It is the responsibility of the Department and Approving Officer to use best judgement that funding will be available to cover the total contract value prior to submitting the contract request. USF Procurement makes best effort, but no guarantees, to incorporate contract terms which allow for changes to or cancellations of the Contract due to funding availability.

Questions - Funding Information

[Print Request](#) | [History](#) | [?](#)

▼ **Funding Source**

Please select the anticipated funding source for this contract *

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Educational & General | <input type="checkbox"/> Auxiliary (Alternate Instruction) | <input type="checkbox"/> Sponsored Award | <input type="checkbox"/> Payment by Third Party |
| <input type="checkbox"/> Flat/Credit Hour Fees | <input type="checkbox"/> Concession | <input type="checkbox"/> Convenience | <input type="checkbox"/> Foundation or Other DSO |
| <input type="checkbox"/> Auxiliary (Educational Business Activities) | <input type="checkbox"/> Research Initiative | <input type="checkbox"/> No-Cost Contract | <input type="checkbox"/> Other |

12

SOURCING INFORMATION: Complete the required fields according to the guidance below. Selection will prompt the collection of different information. When complete Click **“Save Progress”** and **“Next”**

- USF Public Solicitation (ITN/ITB)
- Competitive Quotations
- Emergency Purchase
- Single/Sole Source
- Non-USF public competitive solicitation
- Policy Exemption
- Order under \$10,000, competition not required

USF Public Solicitation: You will be asked to provide the Solicitation Number

Competitive Quotations: You will be asked to provide the quotes in the attachment section and confirm that you have met the diverse supplier requirement

Single/Sole Source: Justification must be added in the attachment section.

NON-USF Public competitive solicitation: Contract number and source must be provided. Quote must reflect the number of the pricing Contract.

Policy Exemption: Justification should be provided in the summary or as an attachment.

Order under \$10000: To support USF’s commitment to diverse business, indicate if a diverse supplier was selected.


▼ Other Sourcing Situation

A contract or purchase order must be in place prior to services beginning or products being ordered. If this guideline is not followed, the order is considered After the Fact. If this occurs, please provide the date services began or the order was placed.

Have services already begun or items already been ordered? *

- Yes
- No

ATF Date Services Began *



mm/dd/yyyy

ATF: You are required to report and indicate if proper procurement procedure was not followed and if acceptance of goods and services commenced before the execution of the contract.

13

REVIEW AND COMPLETE: Once all the sections have been completed, review each section for accuracy and Click **“Complete Request”**.

Contract job-aid VO

Form Number: 444388
Request Status: Incomplete

Instructions

Details

Attachments 1

Questions ✓

Header Information ✓

Departmental Information ✓

Background Information ✓

Supplier Contact Informat... ✓

Funding Information ✓

Sourcing Information ✓

Review and Complete

Discussion

Contract Request Workflow

★ Required

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete
Header Information	✓ Required fields complete
Departmental Information	✓ Required fields complete
Background Information	✓ Required fields complete
Supplier Contact Information	✓ Required fields complete
Funding Information	✓ Required fields complete
Sourcing Information	✓ Required fields complete

◀ Previous **Complete Request**

Click here to submit

14

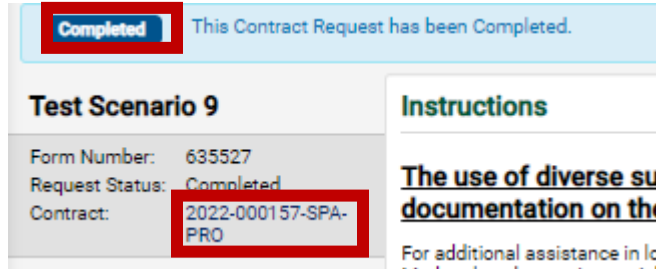
Confirm

Are you sure are ready to complete your new contract request?

Yes No

15 **NEXT STEPS:**

- 1) Contract Request will be routed to Procurement for Review
- 2) Once your Contract Request has been approved to create a Contract Record, your Contract Request will change first to a status of **Approved** and then finally to **Completed**. When you navigate to your request you will see a Contract Record Number. Clicking on this link will take you to the Contract Record.



- 3) The below workflow outlines the path your Contract Record will take towards execution. For more information visit our [Contract Administration](#) web page.



Contract Workflow Process

