This guide will assist you in submitting and managing your USF contracts from creation to closure. USF contracts are defined as those agreements covered by the USF Purchasing Guidelines Manual: Section for Commodities and Contractual Services.

This automated process replaces the manual paper “Contract Transmittal Memo” process. Some benefits of this new automated system, besides being faster and receipt confirmation upon submission are the ability to check the various stages of a contract at any point in the process, access to an immediate electronic copy of contract, receipt of email contract renewal reminders 90 – 60 – 30 days ahead of the contract expiration date and on the contract expiration date, etc.

**HOW TO LOGON TO SERVICE NOW**

During the contract testing phase you will go to [http://usflltest.service-now.com](http://usflltest.service-now.com) with any web browser and enter your logon credentials. Your TEST user credentials are your NET ID as the User name and **usf123!** as the Password.

![Login Screen](https://example.com/login-screenshot.png)

**HOW TO SUBMIT A CONTRACT**

To enter a contract for review and approval, navigate to the Service Now Service Catalog and click on **Submit a Contract for Approval** in the Business and Finance section.
Below is an explanation of each field on the contract submission form. Once the form has been completed and the contract attached, press the Submit button found on the bottom of the form to submit your contract for review and approval. Mandatory fields must contain a value. Mandatory fields are marked with a vertical red bar before the label.

1. **Submitted by**
   a. This is the person submitting the contract and is automatically filled in with the person who is logged on to the computer.

2. **Is this contract for software/hardware, IT contractual services?**
   a. No (you may proceed to next question)
   b. Yes (Is a Technology Exception (UTSB) required?)
      i. UTSB not required (proceed)
      ii. I need to request UTSB approval (you will be redirected to UTSB request form)
      iii. I already have a UTSB approval (enter an approved RITM number)

3. **Vendor** – The name of the vendor with whom the contract is with. This field contains the names of all current vendors. If your vendor is not listed, please follow instructions on form to have your vendor added before submitting contract. This file is updated daily.
   a. Begin typing vendor name or click on the magnifier glass to search for vendor by name or FAST vendor ID.

4. **Contract short description**
   a. Provide short and brief description of contract.

5. **Contract amount**
   a. Enter the amount of contract as specified in the contract (dollar signs and commas not necessary).

6. **Contract start date**
   a. Click on calendar icon and select date contract begins as specified in the contract.

7. **Contract end date**
   a. Click on calendar icon and select date contract ends as specified in the contract. Contract End date must not be before Start date.

8. **Select the area(s) covered by this contact**
   a. Check box for applicable area or areas the contract covers. If contract covers all USF, click Tampa.

9. **Method of funding (select method of funding)**
   a. E&G funds
   b. Auxiliary
c. Collected fee
   i. Provide brochure
      Attach an electronic copy of the brochure by clicking on the paperclip icon in the upper right hand corner. An Attachments popup will appear, click Choose Files to navigate to the file you would like to attach. Once selected, click Attach. You can view the attached file under Current file attachments: You may attach as many files as you need to. When finished, press the small x to close the Attachments popup.

   d. Grant
      i. Provide grant guidelines/budget showing this is an allowable expense
         Attach an electronic copy of the grant guidelines/budget showing this is an allowable expense by clicking on the paperclip icon in the upper right hand corner. An Attachments popup will appear, click Choose Files to navigate to the file you would like to attach. Once selected, click Attach. You can view the attached file under Current file attachments: You may attach as many files as you need to. When finished, press the small x to close the Attachments popup.

10. Method of procurement
    a. Single source
    b. Competitive quotes
    c. ITN/ITB process
       ii. Provide bid number

11. Is this a master agreement? Is this contract part of a master agreement?
   a. Yes
   b. No

12. If this contract is part of a master agreement, please select the agreement
    a. Begin typing master agreement number or click on the magnifier glass to search for master agreement by number, vendor, etc.

13. Is this a hotel agreement?
    a. No - proceed
    b. Yes – provide answers to the questions below
       i. USF will be responsible for
          1. Check box for applicable USF responsibility
       ii. Individuals will be responsible for
          1. Check box for applicable Individual responsibility

14. Department - The Department for which the contract is for.
a. Begin typing department name or click on the magnifier glass to search for department by description or FAST Dept ID

15. **USF department approving officer** – The contract approval roles for the Contract Module will include Accountable Officers (as defined by University Controller’s Office), Accountable Officer Designees, and Requisition Approvers. These department approving officers are updated nightly in our system.
   a. Begin typing the name of the USF department approving officer or click on the magnifier glass to search for the USF department approving officer.

16. **USF contract administrator**
   a. Begin typing contract administrator or click on the magnifier glass to search for contract administrator.

17. **USF department contact**
   a. Begin typing department contact or click on the magnifier glass to search for department contact.

18. **Vendor contact information** – Provide additional vendor information that is not found in the Vendor table such as contact person or sales rep, etc.
   a. Begin typing department contact or click on the magnifier glass to search for department contact.

19. **Describe this contract**
   a. Briefly describe the purpose of this contract.

20. **Additional comments**
   a. Enter any additional information you would like to provide regarding this contract.

21. **Attach the contract and submit**
   a. Attach an electronic copy of the contract by clicking on the paperclip icon in the upper right hand corner. An Attachments popup will appear, click Choose Files to navigate to the files you would like to attach. Once selected, click Attach. You can view the attached file under Current file attachments: You may attach as many files as you need to. When finished, press the small x to close the Attachments popup. You will also notice that the attached file(s) can be seen at the top of the contact just under the blue banner beside the words Manage Attachments:
   b. Click on the Submit button to submit your contract for review. You will receive an email confirmation that your contract has been submitted. This email will contain your contract number. All submitted contracts receive a unique number beginning with the letters CNTR followed by seven numbers.
HOW TO CHECK CONTRACT STATUS

One of the nice features of this new automated system is the ability to check the various stages of a contract at any point in the process.

To check the status:
1. Login to Service Now using your Net ID credentials
2. Click on My Contracts in the left-hand column
3. To expand the Stage column to see the various stages, click on the plus sign [ ]. Below is a sample of the stages you may see.

4. Alternately, you can view a listing of all your contracts from the main Self Service screen. From this listing you view the Contract Number, State, Vendor, Start date, End date, Short Description, Stage and Expiration level. You can resort list by double-clicking on a column and open a contract by clicking on its Number.

HOW TO PROPOSE AN AMENDMENT --
CANCELLATION, RENEWAL AND EXTENSION

An amendment may be a cancellation, renewal or extension of a contract. Amendment of a contract follows the same Purchasing and General Counsel approval process as new contracts. You may track the status of an amendment contract in the same manner as a new contract. Cancellations, Renewals and Extensions of a contract cannot occur when the contract State is Cancelled or when the contract Substate is Awaiting Review. Amendment supporting documentation and a short description of the Amendment are required when proposing a contract amendment.

To Propose an Amendment:
1. Open the contract you wish to amend.
2. Use the paperclip icon in the upper right hand corner to attach the amendment supporting documentation.

3. Enter a short description of the amendment in the “Comments (Customer visible):” section of the contract form.

4. Press the Propose Amendment button
   Note: If the contract State is Cancelled or the contract Substate is Awaiting Review the Propose Amendment button will not appear; a contract may not be amended if it has already been cancelled or if it is currently under review.

5. Press OK.