**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.

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<th>Steps</th>
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<tr>
<td>1</td>
<td>In the flyout menu &gt; Go to Contracts &gt; Requests &gt; Request Contract</td>
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</table>

1.1 You will be prompted to name your Contract Request > then click Submit

### Create Contract Request

- **Contract Request Name**<br>Enter the name of the contract request.
- **Select a Contract Request Template**<br>Choose the USF Contract Request Form template.

**NOTE:** The Contract Request Name will not become part of the Contract Record. This will reside in the Contract Request field only. There is no specific naming convention. User can name it however he/she wants it to be.

Contract Request Template: USF Contract Request Form
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<td>2</td>
<td>For easy navigation, we suggest that you let the wizard walk you through the process. Click &quot;Next&quot; below.</td>
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</table>

2.1 Details

![Image of Contract+ Job-aid interface]

- **Test contract**
  - **Form Number:** 442208
  - **Request Status:** Incomplete

- **Details**
  - **Attachments:** 0
  - **Questions:**

![Image of Contract Request Workflow]

- **Instructions**
  - Please add your main contract document and all other relevant documents in the Attachments section. When responding to questions, if a response required a document upload, please make sure they are in the Attachments section. Contract Requests missing required documents will be returned to the submitter.

- **Contract Request Name:** Test contract
- **Template:** USF Contract Request Form
- **Contract Type:** –
- **Description:** –
2.2 Click “Next” again and it will take you to the Attachment field.

Here you attach your documents (re: Supplier contract, Independent Contractor Worksheet, Primary quote, competitive quotes, and additional information) for Purchasing to review.

NOTE: Attach each document in separate files.

If you happened to attach the wrong attachment, you have the option to delete it.

### Steps

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<tr>
<td>3.</td>
<td>Questions – this section is where you input most of the information regarding this contract request (re: Primary contact; Department Approver; Supplier Information, etc)</td>
</tr>
</tbody>
</table>
3.1 Header Information

Questions - Header Information

**Contract Name** – the contract name can be the Supplier’s Business name or certain Keyword that will make your contract easily searchable. This information will become part of the Contract Record and can be used as search criteria.

**Summary** – is a short description regarding the commodity or services outlined in the Contract Request Form.

**Supplier** - select the Supplier from our Supplier database

In the event the Supplier is not in the system you will be redirected to complete a New Supplier Request.
**Additional Second Parties** – this is an optional field. University of South Florida is the First Party. The Supplier is the Second Party. You complete this section if there is a Third Party associated to the contract. If none, leave it blank.
Start and End Dates – this information can be found in the contract document. If no specific start date provided it is presumed the contract will start upon execution so, check off the box “Update Start Date Upon Execution”. Make sure you enter the Total Contract Value. Click “Save Progress” or “Next” to go to the next field.

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<tr>
<td>3.2</td>
<td>Department Information</td>
</tr>
</tbody>
</table>

USF Department ID & Name – it should be the six-digit Dept ID followed by a space, followed by a dash, followed by another space, and the Department name (Example: 21600 – Electrical Engineering)
Contracts+ Job-aid

**Primary Contact**

Primary Contact Name *

Primary Contact Email Address *

**Primary Contact** – this can be anyone that the department wants to be the main point of contact for this Contract Request.

**Other Stakeholders**

Are there any other USF employees that need to view this contract and receive notifications about it? *

- Yes  
- No

Please upload the list of USF stakeholders. *

- I confirm that I have attached a list of names and emails for all relevant USF stakeholders to the Attachments section.

**Other Stakeholders** – if answered “Yes” you will be prompted to attach a list of stakeholders. Check off the box and upload the list in the Attachment section (Step 2.2)

### 3.3 Background Information

**Background Information**

Please check all appropriate boxes *

- Construction or Renovation of Tampa grounds/buildings
- Use of a USF Logo
- Services Provided by an Independent Contractor
- Non-standard technology requiring UTSB approval
- None of the Above

**NOTE:** Some purchases require additional approvals prior to purchase. These approvals should be obtained and attached to the Contract Request submitted to Purchasing for review.
3.4 Supplier Contact Information

These are all required fields. Make sure you provide Information for each field.

3.5 Funding Information

Select the appropriate funding source to be used to accomplish contractual obligations.

3.6 Sourcing Information

Our requirements for competitive solicitations can be found on our website. Generally speaking, we require competitive quotations from alternative suppliers if the total purchase exceeds $5,000. There are variety of exemptions from our quote requirements, but these must be properly documented so your Procurement Agent can review them.
Steps | Section Header
--- | ---
4 | Review and Complete

[Image of a webpage with a table and a confirmation dialog]

**Click here to submit**