Budget Year 2023 Contract Renewal Process

The remaining information is a guide on how to enter Fiscal Year 2023 (FY23) contract renewal requisitions *prior* to July 1, 2022.

Fiscal year 2022 Marketplace carts must be converted into requisitions by June 17th to allow time for orders to get through the workflow approval process and to be dispatched prior to fiscal year end. Marketplace access will be restricted after June 17th until July 1st. Any Marketplace orders that have not received final approval by June 29, 2022, will be closed and a new requisition will need to be entered in Fiscal Year 2023. It is strongly encouraged to check your order status on July 1 to determine if it has been processed or cancelled.

Fiscal Year 2022 Peoplesoft regular requisitions must be entered by the department and approved by Procurement no later than June 17th to allow for time orders to be assigned and worked by a contract specialist and dispatched prior to fiscal year end on June 30, 2022. Any requisition that has not been dispatched prior to July 1, 2022, will be closed and a new requisition will need to be entered in Fiscal Year 2023. It is strongly encouraged to review pending Fiscal Year 2022 requisitions statuses to ensure approvals are received prior to the fiscal year deadline.

Peoplesoft Fiscal Year 2022 requisitions must be approved by Procurement to be worked by June 17th to allow for time orders to get through the workflow approval process and to be dispatched prior to fiscal year end. Any requisition that has not been dispatched prior to July 1, 2022 will be closed and a new requisition will need to be entered in Fiscal Year 2023. It is recommended to check your order status on July 1 to determine if it has been processed or cancelled.

Create New Requisition:

- 1. Header comments Please enter the following information:
 - a. The type of standing order (property or equipment lease, maintenance, etc.).
 - b. Contract term dates (ex. July 1, 2022 June 30, 2023).
 - c. If the requisition is for a renewal, please include the previous purchase order number for reference.
 - d. The contact information for the vendor, if HIPAA or FERPA apply, and whether they will be providing services on campus.
 - e. Attach renewal contract and all back-up documents.
 - f. Make sure to check the Send to Supplier, Show at Receipt, and Show at Voucher boxes so Procurement can view the documents.

Red	uisition Comments and Attac	hments		
	Enter requisition comments			
	Period of Agreement from: Ju	uly 1, 2021 thru June 30, 2022		<u>م اع</u>
	Previous PO #0000000000			v
	Send to Supplier	Show at Receipt	Shown at Voucher	Add more Comments and Attachments

2. Create each line, entering vendor information and the amount. On the first line enter "FY23" at the beginning of line description.

Agreement PRO-ADDIO

3. Click the "Line Details" icon.

Line Description		Supplier		Quantity	UOM		Price	Total Detail	s Comments D
Smith-Victor 36" pro-duty copy		B&H PHOTO-VIDEO- PRO-AUDIO		2.0000	Each		292.4900	584.98	💬 Edit 🔳
Shipping Line 1	"Ship To	DEFAULT	Q	Add Shipto Comn	nents	Quantity	2.0000		
	Address Attention To Due Date	SAME AS SHIPPING Kimberely J Helton	153			Price	292.4900	Price Adjustment Pegging Inquiry	
1								Pegging Workbench Custom Fields	

4. Select the "Fiscal Year Renewal" box and then select OK to apply the status.

	Line Details		3
Line Details @	Smith-Victor 36" pro-duty copy	Line Status Open	Help
Item Details (2) Merchandise Amount Category Original Substituted Item Description Physical Nature Buyer	S94 98 USD 660400 477569 Buyer Information Configuration Info	Waiting on Bid Device Tracking Fiscal Year Renewal Amount Only Inspection Required	
Contract ID Version Contract Line Category Line	Use Contract if Available		

5. Enter your accounting information in the chartfield spread as usual or you will receive an error message when you click "Save for Later".

6. Click the "**Save for Later**" button to save your requisition. The "Budget Check" and "Save & Submit" buttons are not available when using the "Fiscal Year Renewal" status. To exit the requisition, select the Return to Requisition link.

Enter requisition comments			
Information attached			
Send to Supplier	Show at Receipt	Shown at Voucher	edit more Comments and Attachments
oval Justification			
Enter approval justification for	or this requisition		
			Return to Requisition

7. Procurement will run a query weekly to identify renewal requisitions to be processed. Requisitions that do not have the Fiscal Year Renewal status will not be able to be found by Procurement. Additionally, once the Save for Later button is selected, if you re-enter the requisition to edit, it will cause an error. Changes to saved requisitions are not available until July 1 for Procurement.

After 2023 Budget Becomes Available

Once the FY23 budget is available, use the following steps to complete the requisition process.

1. To check the status of a requisition, navigate to Manage Requisitions within eProcurement. Select Clear and then enter the Requisition number in the Requisition ID field. Select Search, and the requisition will display.

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Manage Requisitions	Manage Requisitions	New Window Help Personalize F
Requisition	Search Requisitions	
	To locate requisitions, edit the criteria below and click the Search button.	
Requester Setup	Business Unit NORMN Q Requisition Name	Q
	Requisition ID G Request State All but Complete V Budget Status	~
Activity Summary	Date To 03/20/2022 B Origin Origin	
/ tourity outliniary	Requester 477569 C Entered By Q Supplier Q PO ID	Q
Print POs	Search Clear Show Advanced Search	
Supplier	Requisitions (2)	
	To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.	
	Req ID Requisition Name BU Date Request State Budget Total	
	▶ 0000015665 0000015665 NORMN 03/20/2022 Pending Valid 596.90 USD [Select Action] ✓ Go	
	Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report	

2. Once the requisition loads, select "Edit" from the drop-down menu and then select "Go."

Re	tequisitions 👔										
To To	view the lifespar edit or perform a	n and line items for a requisition, another action on a requisition, r	click the E nake a sele	xpand triangle	e icon. e Action dropdown I	ist and click Go.					
	Reg ID	Requisition Name	BU	Date	Request State	Budget	Total				
►	0000015615	OU COPELAND HALL "DEI"	NORMN	08/26/2021	Approved	Valid	6,601.40 L SD Edit	✓ Go			

3. Once the Edit Requisition page expands, it is best practice to review the accounting chart field spread one last time. Verify the budget status is "Valid." If yes, select "Save & Submit." The requisition will now be routed through the normal approval process.

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R	Check Budget		Bud	get Checking Status: <u>Vali</u>	<u>d</u>	Return to Requisition	
Ŀ	Save & submit	Save for Later	÷	Add More Items	60 Preview Approvals	Add Request Document	

If you have additional questions, please email Procurement at <u>askpurchasing@ouhsc.edu</u> or phone Procurement at 405-325-2811 to request assistance.