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.

Requisition Comments and Attachments

Enter requisition comments

Period of Agreement from: July 1, 2021 thru June 30, 2022

Previous PO #0000000000

☑ 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.

▶ ☐ 3 🔧 FY 23 Annual Service Agreement B&H PHOTO-VIDEO-PRO-AUDIO 1.0000 Batch Lot 1.0000 1.00 📑 💬 Add 🗑

3. Click the "Line Details" icon.

Line	Description		Supplier	Quantity	UOM	Price	Total	Details	Comments	D
▼ ☐ 1	🔧 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 🔍	Add Shipto Comments	Quantity	2.0000				➕ ➖
		Address	SAME AS SHIPPING		Price	292.4900	Price Adjustment			
		Attention To	Kimberely J Helton				Pegging Inquiry			
		Due Date	📅				Pegging Workbench			
							Custom Fields			

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

Line Details ✕

Help

Line Details ?

No Image Line 1 🔧 Smith-Victor 36" pro-duty copy Line Status Open

▼ Item Details ?

Merchandise Amount 584.98 USD ☐ Waiting on Bid

Category 660400 ☐ Device Tracking

Original Substituted Item Description ☐ Fiscal Year Renewal

Physical Nature Goods ▾ ☐ Amount Only

Buyer 477569 ☐ Inspection Required

Buyer Information

Configuration Info

▼ Contract Information ?

☑ Use Contract if Available

Contract ID 🔍📋

Contract Details

Version

Contract Line 🔍

Category Line 🔍

▼ Supplier Information ?

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

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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.

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.

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

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