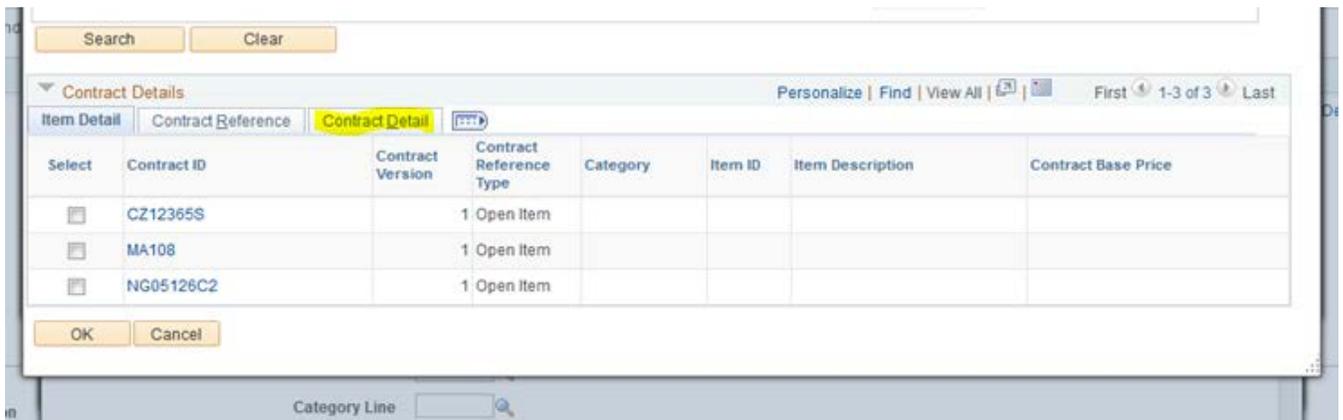


Requisitions – Linking to Contracts

- **Contract PO** – It’s easiest to link the contract at the Req stage not on the PO stage. PO’s over \$5,000 that do not have a contract linked to them will be sent back to the requestor to add a contract or cancel.
- After you have entered your **Requisition Settings** and **Special Requests** click on **checkout**, and then click on the **details** icon (it looks like a yellow sheet of paper with an arrow to a smaller white sheet of paper). This is where you can reference or link a contract (in addition to checking **Amount Only** for services instead of goods). Under **Contract Information** click on the icon that looks like a yellow piece of paper with a small magnifying glass – you can look up a contract by contract number, or by supplier (this will show all the contracts the County has with a specific supplier). Click on the box of the contract you need and click **Ok**. **Please note:** There are many suppliers that have similar supplier names/IDs, please make sure that the supplier on the contract is the supplier that you have chosen on your req (if there is a discrepancy between the two, you will not be able to link the contract). [UPK – Create a Requisition for a Contract Purchase](#)
- **State Contract Numbers:** For any state contract purchase from a county master agreement, please review the requirements of the contract on the state’s website: <http://purchasing.utah.gov/purchasing/statecontractsearch.html>. Especially for multiple award contracts, there may be requirements of the contract to get quotes from the other multiple award contracts before making a purchase. It is the agency’s responsibility to maintain a file of quotes or any other required purchasing justifications for purchases made from multiple award contracts.
- **Linking a Contract When the Supplier has Multiple Contracts** – When multiple contracts come up for the supplier when linking a contract to your requisition and you aren’t sure which contract to use, you can get more detail about that contract from the screen you are on by clicking on the “Contract Detail” tab as shown below:



Then you'll be able to see a description of each contract as well as the begin and expiration dates seen below (please note on the example below CZ12365S is the contract with the old County Number and MA108 is the same contract migrated to the State Contract Number):

Select	Contract ID	Contract Version	Description	Supplier ID	Supplier Name	Master Contract ID	Contract Process Option	Begin Date	Expire Date
<input type="checkbox"/>	CZ12365S	1	CZ - COMMUNICATIONS SERVICE MA	0000004300	CENTURYLINK		General Contract	02/29/2012	02/28/2013
<input type="checkbox"/>	MA108	1	CZ - COMMUNICATIONS SERVICE MA	0000004300	CENTURYLINK		General Contract	02/29/2012	02/16/2013
<input type="checkbox"/>	NG05126C2	1	IS - TELECOMMUNICATIONS EQUIP	0000004300	CENTURYLINK		General Contract	03/15/2006	04/30/2011

- Purchasing Off Of State Contracts:** Once you have found a State Contract that you wish to make a purchase from, look in PeopleSoft to see if the County already has a Master Agreement based on the State Contract in place (they now are the same numbers as the State Contracts they reference). You can check for contracts by going to *Main Menu/Supplier Contracts/Create Contracts and Documents/Contract Entry* and search by either the contract # which is the “Contract ID” or “Supplier Name” (note: if you search by Supplier, use the magnifying glass to ensure that your entry matches exactly what’s in the System). If we have the contract in place already, go ahead and enter your requisition and link to the contract like any other contract purchase. **If we do not** already have a Master Agreement in place, please contact our office, and one of the Buyers will be able to help you with your options for the purchase.
- Expired Contracts Don’t Link:** You cannot link an expired contract to a new requisition or PO. In the old system there was a “grace period” where payment could be made on an expired contract up to 90 days after the expiration. That doesn’t exist in PeopleSoft. Remember, only PO’s encumber funds in PeopleSoft, so be sure to enter your encumbering PO’s linked to a contract before the contract expires to avoid any payment problems. If you don’t do this, you may need to request payment through the claims procedure.
- P-Cards for Small Cost Supplier Contract Payments:** Mayor’s Finance should only be sent invoices for payments on “not to exceed amount” contracts or for payments over the \$5,000 small cost/capitalization limit. Unless your small cost purchase (under \$5,000) from a contract is on a “not-to-exceed amount” contract, save yourself, Accounts Payable, and the vendor the trouble of paying small cost invoices by using your p-card. All our county Master Agreements based on state contracts are set up as unlimited contracts and invoices can be paid using a p-card if the invoice amount is under \$5,000. So next time you need to pay a \$200 invoice to Office Depot, save time and money by using your p-card.