INSTRUCTIONS FOR CREATING A CONTRACT REQUEST

Draft March 5, 2020

Requesting a Contract

- Departments may submit vendor contracts for review or request university-written contacts using the RealSource Contracts+ module.

- To start the process, departments should first collect all of the necessary data and documents needed to effectively and promptly review and create a contract. Departments may need to coordinate with other university departments to satisfy certain pre-requisites that are required by law or university policies/practices. Lack of data, documents or attention to pre-requisites will extend the contract review and execution process.

- Once all relevant data, information and pre-requisites have been satisfied by the department, a request to create a contract can be submitted by a RealSource user. If the user is not the university employee who will be managing the contract and the contractor’s work, the user should closely coordinate with their colleague prior to starting the request process.

- As with all RealSource forms, data fields marked with an asterisk are “required” and help-text for data fields can be found by clicking the question-mark to the right of the field.

- When completing the forms, all data fields must be accurate and answers to questions must be truthful. Both trigger actions within the system, including approval workflows, work assignments, etc. Further, Contracts+ serves as the university’s system of record for all purchase contracts and agreements, therefore, the accuracy of university reporting and its ability to meet FOIA requests will largely depend on the quality of the user’s work.

A. To start the process to request a contract, login to the RealSource homepage. From the left side of the homepage, select

1. Contracts icon (clipboard with pencil)
2. Requests
3. Request Contract
B. **Create Contract Request**
   1. **Contract Request Name.** Name your request for future searching
   2. **Select a Contract Request Template,** always select **Other**
   3. **Submit**

C. **Instructions.** Thoroughly read the instructions, then select **Next**
D. **Details.** No input is required. This screen merely displays the information keyed earlier. If a correction is needed, go back to the prior screen(s) to make corrections. Select **Next.**

![Demo Contract Request Details](image)

E. **Attachments.** Add all contract or other documents necessary for Procurement Services to complete the review and execute the contract. This includes the contract, all attachments, PDF copies of materials referenced by hyperlink, terms and conditions, specifications, statements of work, etc. The maximum size limit per attachment is 50MB. After attaching all documents select **Next.**

![Demo Contract Request Attachments](image)
F. **Questions.** This section includes a series of screens to collect data and answers to questions. All data must be accurate and answers to questions must be truthful.

G. **Requested on Behalf of.** Provide information about the person who actually requested the contract and will work with the contractor. This may not be the person filling out the form, but a colleague instead. Select Next.
H. **Basic Contract Information.** Add all of the required information. Note.....

- **Second Party** is the name of the Vendor. The vendor must reside in RealSource. If not, stop and submit a Request New Vendor form from the RealSource homepage, Vendor icon. Adding a vendor to RealSource to process a contract request will be given a high priority but may take until the next business day.

- The **Second Party** (Vendor) does not need to be flagged as “active” in RealSource to complete and submit a contract request, however, you should submit an Existing Vendor Request Form at the bottom of the RealSource homepage to activate the vendor so as not to delay contract execution.

- The **Additional Second Parties** field does not apply to VCU and must be left blank.

Select **Next**.

I. **Contract Duration.** Enter all of the information requested.

- Do not backdate the **Estimated Start Date**.
- The university is not permitted to execute contracts that do not “end” (do not have a projected end date). The **Estimated End Date** applies to the “base term” (initial term) and excludes renewal periods.
- Click on the help-text (question mark to the left of the renewal fields) for information on how to enter **Renewals, Base Term Duration** and other fields.
J. **Finance.** This section includes a series of finance questions created by other departments (i.e., Treasury, Grants/Contracts, etc.) Some questions may...

- establish pre-requisites that must be met by the department before the request can be processed
- not apply to your request
- cause additional questions to appear based on answers

All questions must be answered truthfully.

Select **Next**
K. **Technology.** This section includes a series of technology questions created by other departments (i.e., IT Security Officer, Governance Committee, etc.) Some questions may...
- establish pre-requisites that must be met by the department before the request can be processed
- not apply to your request
- cause additional questions to appear based on answers

All questions must be answered truthfully.

Select **Next**

![Example of Technology Questions](image)

L. **Work Location.** This section includes a series of questions around the location of the work that were created by other departments (i.e., Treasury, Safety&Risk, etc.) Some questions may...
- establish pre-requisites that must be met by the department before the request can be processed
- not apply to your request
- cause additional questions to appear based on answers

All questions must be answered truthfully.

Select **Next**
M. **Marketing.** This section includes a series of marketing questions created by other departments (i.e., University Relations, Business Services) Some questions may...

- establish pre-requisites that must be met by the department before the request can be processed
- not apply to your request
- cause additional questions to appear based on your answer.

All questions must be answered truthfully.

Select **Next**
N. **Review and Complete.** The department has the ability to see the progress of each section. If the section is fully completed the department will see

- **No Required fields**

If the department has not fully completed the section, they will see

- **Incomplete**

If incomplete, the department can must go back to complete the section. Once all of the sections are completed and a green check mark is next to each section, the department can complete the request.

![Complete Request](image)

O. **Discussion Threads.** The department has the option to begin one or more discussion threads with Procurement Services in the **Discussion section.**
P. **User Notification.** Once the contract request has been completed and submitted

![Demo Contract Request](image)

Q. **Check Status of Contract Request.** The department can also access and check the status of requests by selecting:

- **My Contract Requests** or **Search Contracts Requests** from the **Contracts** icon.

![Contracts](image)
• **My Contract Requests.** Departments can filter their contract requests based on the contract request status.

![My Contract Requests](image)

**R. Determining Who Is Reviewing a Contract.** Once the request has been

Statuses are listed in the above screen shot.

**S. Actions Taken by Procurement Services Staff.** The following actions may be

1. **Request Returned.** If Procurement Services opts to “return” your request...

   - **Request Status** will change to **Incomplete**
   - A notification and email will be sent to the user through RealSource
   - The department will see **Returned** indicated on the actual request
   - The user can correct the request and resubmit it.

![RE: New Form Request Returned for Demo Contract Request](image)
2. **Request Rejected.** If Procurement Services opts to “Reject” the request...

- **Request Status** will change to **Reject**
- A notification and email will be sent to the user through RealSource
- The department will see **Rejected** indicated on the actual request
- The user cannot correct the request nor resubmit (copy) it

![Image of Rejected Request Notification]

3. **Approve/Complete.** Once Procurement Services has determined the request is

- **Request Status** will change to **Approved**
- Two notifications and emails will be sent to the user through RealSource
- The department will see **Approved** indicated on the actual request

![Image of Approved Request Notification]
T. **Completion & Execution of the Contract.** Once the contract is fully reviewed,

[flowchart: Workflow Update for Demo Contract Request]

Demo Contract Request has been received and reviewed.

Type of Request:

[end of draft]