An EPIC Contract Request is used to initiate your request to Purchasing Services to create a Service Agreement. This form is used when there is an agreement between the University and a registered Business or an Individual with a business registration number to perform specific services where the University’s standard agreement will be used.

GETTING STARTED

Before you go into EPIC to start a contract request for a Service Agreement
Get ready to start:

- Scan a copy of the required documents:
  - Description of Services
  - HR Approval
  - All related documents
- Know the total amount of the agreement and of any additional expenses if applicable.
- Know the Start and End dates of the agreement.
- Get the FOAP that will be used.
- Confirm who will be the signing authority. This is who will be authorizing the total amount to be charged to the Contract (EPIC access required).
- Define who the Department Contact/Contract Contact will be. This is the invoice approver which is equal to receiving and does not need to be an individual with signing authority.

STARTING A REQUEST FOR A SERVICE AGREEMENT

1. Click on the Create menu and choose Contract Request (Procurement).

2. Complete the following fields:
   a) Name: The Supplier and a brief explanation of the expected service.
   b) Description: Provide the full details of what will be included in the contract such as the type of services or goods to be provided by the supplier.
   c) What type of request is this? Click in the field and select Service Agreement from the drop down.
   d) Is this an Amendment? Select No.
   e) Supplier: Choose the supplier for the contract.
      i) Click in the Supplier field and select Search More.
      ii) Enter the Supplier name in the search bar and click Search.
      iii) Select the radio button to the left of the desired supplier to select.
      iv) Click OK to return to the form page.
   f) Enter supplier email address (Optional): Provide the email of the supplier you have contact with so they will receive a copy of the final contract.
   g) Contract Amount: Enter the amount of the contract for the Fiscal year.
n) Department Contact: Select the individual from the department that the supplier can contact.
  i) Click Select.
  ii) Search for the person in the field provided.
  iii) Click on the checkbox beside the name then click Done.

o) Department Phone Number: Enter the office phone number for the Department Contact.

p) Date Fields:
  i) Start Date: Enter the start date of the service agreement.
  ii) Expiration Date (Optional): For internal billing purposes, Purchasing Services will enter a date that is one to two months past the end date to allow for invoice processing.
  iii) End Date: Enter the date you expect the services to be completed by.

3. Review all information.
4. Click Create once all required fields are filled.
5. Your Contract Request Workspace is created.
6. Complete the tasks listed in the Tasks tab.
   (See section Completing Tasks in the Contract Request Workspace for instructions.)

COMPLETING TASKS IN THE CONTRACT REQUEST WORKSPACE cont’d...

3. Task 2—Attach Description of Services in Documents Tab
   a) In the Document column beside the task name click on the link “Contract Request Attaching Document Instructions—Description of Services Guide”.
      i) A drop down menu will appear.
      ii) Select Replace Document.
   b) Select Browse to find the scanned documents you saved then choose Open to pull your document into EPIC.
   c) Select Replace.
   d) Ensure the radio button beside the option “Replace document by uploaded file” is selected and click OK.
      i. You will be prompted to update the name of the document and add comments (optional). Click Save.
   e) You will be returned to the Tasks tab.
   f) Click on the task name. A drop down menu will appear.
   g) Select Mark Complete.

4. Task 3—Attach HR Approval in Documents Tab
   a) In the Document column beside the task name click on the link “Contract Request Attaching Documents Instructions - HR Approval”.
      i) A drop down menu will appear.
      ii) Select Replace Document.
   b) Select Browse to find the scanned documents you saved then choose Open to pull your document into EPIC.
   c) Select Replace.
   d) Ensure the radio button beside the option “Replace document by uploaded file” is selected and click OK.
      i. You will be prompted to update the name of the document and add comments (optional). Click Save.
   e) You will be returned to the Tasks tab.
   f) Click on the task name. A drop down menu will appear.
   g) Select Mark Complete.

5. Task 4—Attach Additional Relevant Documents
   This is an optional task if you need to add additional documents to your service agreement request. (If not needed, you can immediately select Mark Complete)
   To add documents:
      a) Navigate to the Documents tab.
      b) Click Actions (located on the right side) and in the drop down menu under Upload, select Document.
      c) Click Browse to locate and select the document.
      d) Once your document is selected, click Create then in the following page click Done.
      e) Your document is attached.
      f) Return to the Tasks tab. Finish the task by selecting Mark Complete.
AMENDING AN EXISTING SERVICE AGREEMENT

Changes can be made to existing service agreements. These are called amendments. This can include extending the term, increasing the amount, changing the scope of work or the FOAP. This can only be done by the original requestor of the contract. If the original requestor has left the department, contact Aurora Finance to have the contract transferred to another person.

To make an amendment to a contract, follow the steps below:

1. **Click Create** from the Home Dashboard and select **Contract Request (Procurement)**.
2. When the form opens, populate the following fields:
   a) **Name**: Enter “Amendment—(Original Contract Title)”
   b) **Copy from Contract**
      i) Click the field for **Copy from Contract** and select **Other**.
      ii) Search for the original contract by **ID (this begins with a CW)** or **name**.
      iii) Locate the original contract in the results and click **Select**.
   c) **Predecessor Project**
      i) Click the field for **Predecessor Project** and select **Other**.
      ii) Search for the original contract by **ID (the CW# of the contract)** or **name**.
      iii) Locate the original contract and click **Select**. You will be returned to the request form. The remaining information will be populated in the form from the original contract request.
   d) **Agreement Date**
      i) Enter the date that the amendment begins.

   ![Image of form fields](image-url)

3. **Prompt to copy documents and team members** from the previous project will appear at the bottom of the page. Select **Yes** or **No**.

   ![Image of copy documents and team members prompt](image-url)

If you choose **Yes**, in the Contract Request Workspace on the **Team** tab you must replace the **Contract Manager** with **Purchasing Services Receptionist**.

4. Make your edits as required. Once complete, click **Create**.
5. You will be brought to the **Contract Request Workspace** of your contract request.
6. Complete the tasks in the **Tasks** tab to complete the amendment request.

**NOTE**: You will need to obtain and upload HR approval for the amendment. (See section **Completing Tasks in the Contract Request Workspace** for step by step instructions)

MANAGING CONTRACT REQUESTS

You may edit information as well as withdraw or close a contract request before it is approved by Purchasing Services.

**How to check if your request is still “In Approval”**:
1. Click on the **Tasks** tab.
2. View the status for “Submit Request”. If it has not yet been approval the status will state “In Approval”.

**To Edit information**:
1. Click on the **Overview** tab to edit FOAP, supplier, etc.
2. Locate the information that you would like to change. At the level of the section title, on the right side, click **Actions** then select **Edit**.
3. You can edit the information as required then click **OK**.

   **Hint: To edit Contract Request Title, click Actions in the Overview section.**

**To Withdraw a request if not approved**:
If you want to wait to proceed with a contract, you can withdraw the request and submit it again later.
1. Click the **Tasks** tab.
2. Click the task titled **Submit Request** then in the drop down menu choose **View Task Details**.
MANAGING CONTRACT REQUESTS continued...

3. In the following page, click Withdraw. This will withdraw your request from the Purchasing Services approval queue.

To Close a request:
If you do not wish to go forward with your contract request and it is still in the approval queue for Purchasing Services, you can withdraw and close it so no further action can be taken.
1. Follow the instructions to Withdraw your request.
2. Once withdrawn, go to the Contract Attributes section on the Overview tab and click Actions then select Close.

APPROVING AN INVOICE ON A CONTRACT

Contract Invoices will appear in your To Do box with the action required of Approve.

Contract Invoices can only be approved within EPIC.
1. Locate the IR in the To Do box.
2. Click the action required Approve.
3. The IR will open. You can review the original invoice by selecting the uploaded pdf version.
4. After reviewing the invoice, click Approve.

Errors on the invoice?
- Contact the Supplier to request a credit and corrected invoice.
- Ensure the credit is provided to Supplier Payment Services (SPS).
- Once the credit is applied, approve the IR.

Work has not been completed?
- Wait until it has been completed to approve.
- Add a comment in the IR for SPS to be aware of the situation.

HINTS AND TIPS

Searching Contracts
You can view any contract in EPIC, regardless if you or another person created it.

To search for a Contract if it is complete:
1. In the search bar, choose the document type Contract.
2. In the ID field, enter the contract number (C#). The “C” must be capitalized. Click the magnifying glass icon to execute search.
3. Click on the contract in the results list to view information.