

## UHS CONTRACTS PAGE INSTRUCTIONS

### GENERAL INFORMATION

The General Appropriation Act (GAA), Article 9, Sections 7.04 and 7.11 requires state agencies and institutions of higher education to report contracts for the purchase of goods or services from a private vendor, regardless of funding source. The University of Houston System reports contracts to the State of Texas through the Legislative Budget Board (LBB). To help ensure reporting compliance, the UHS Contracts Page tab will be used as a single point of data entry for all contract information that the University is required to report to the LBB. The Contracts Reporting team will use the information collected from the PeopleSoft Contracts tab to report contracts to the LBB.

The University is required to report contracts to the LBB as follows:

TYPE OF CONTRACT	VALUE THRESHOLD	REPORTING TIMEFRAME	LOCATION
All	> \$50,000	Within 30 days of award or amendment	GAA, Article IX §7.04 Government Code §322.020
Non-Competitive/Sole Source	> \$1,000,000	Within 15 days of award	GAA, Article IX §7.11
Emergency	> \$1,000,000	Within 5 days of award	GAA, Article IX §7.11
All	> \$10,000,000	Within 15 days of award	GAA, Article IX §7.11

### CONTRACT AMENDMENTS

For reporting purposes, contract amendments will be treated as separate contract entries. Departments will need to create a new contract in the system to record the amendment and link it to the requisition.

See example below:

Original Contract (executed 8/22/2019)

Contract ID: K-19-12345

Total Amount: \$100,000

Term: 9/1/2019 – 8/31/2022

Amendment 1 (executed 7/15/2022)

Contract ID: K-19-12345-1

Total Amount (original + amendment): \$175,000

Term (original + amendment): 9/1/2019 – 8/31/2024

FY20 - Department creates requisition #1 and enters contract K-19-12345

FY21 - Department creates requisition #2 and links it to contract K-19-12345

FY22 - Department creates requisition #3 and links it to contract K-19-12345

FY23 - Department creates requisition #4 and enters amendment K-19-12345-1

FY24 - Department creates requisition #5 and links it to amendment K-19-12345-1

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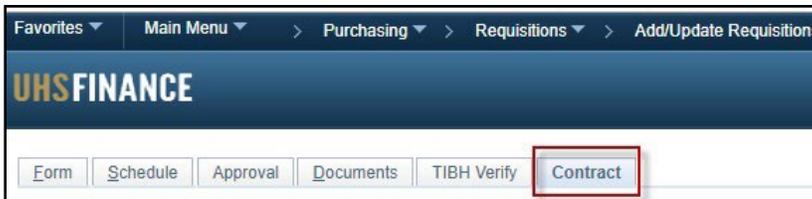
## INSTRUCTIONS

**NOTE: All departments must enter all procurement contracts (and contract amendments) with values greater than \$50,000 into the PeopleSoft Contracts tab. Contracts may be entered without or with the requisition. The requisition may be incorporated with the Contract information later.**

### Instructions for entering a Contract with a Requisition

**Step 1:** Create requisition by following the “How to create a requisition” training located at <http://www.uh.edu/office-of-finance/purchasing/Purchasing%20Training/>

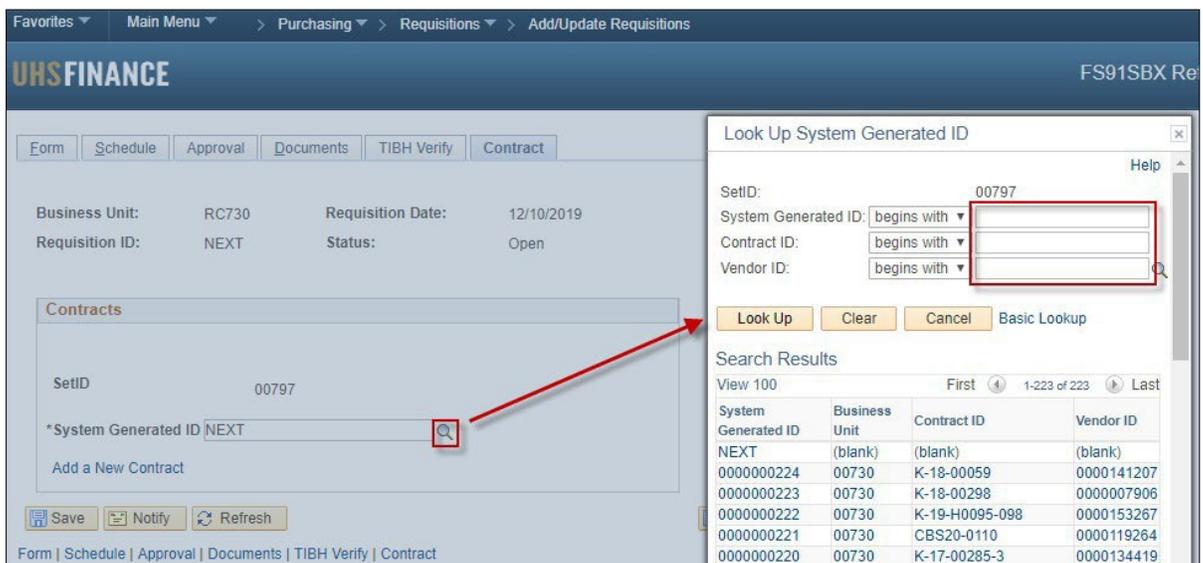
**Step 2:** Click on the “Contract” tab. Expense contracts can be created and/or added (if contract was previously created) from this page.



- Add an existing contract to the requisition by going to the “Add Existing Contract” section below. Note that you can only add an existing contract if someone already created that contract.
- Create a new contract by going to Step 3.

### Add Existing Contract

a. Click the search  icon. The Look Up page is displayed.



b. You can search for contracts by:

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System Generated ID	This is a 6-digit unique number that is automatically generated by the system once a contract is saved.
Contract ID	K Number assigned by Office of Contract Administration (OCA), or department assigned number if no K number available.
Vendor ID	Unique number assigned to vendors that receive non-payroll payments from UH System.

- c. Once contract is found, select to add and click save.
- d. You can view the selected contract by clicking on the “View Contract” link.

Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions

**UHS FINANCE**

Form | Schedule | Approval | Documents | TIBH Verify | **Contract**

Business Unit: RC730      Requisition Date: 12/10/2019  
Requisition ID: NEXT      Status: Open

**Contracts**

SetID	00797
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\*System Generated ID  🔍

[View Contract](#)

Save | Notify | Refresh | Add | Update/Display

Form | Schedule | Approval | Documents | TIBH Verify | Contract

**Step 3:** Click the “Add New Contract” link. Do not enter anything on the “System Generated ID” field.

UHS CONTRACTS PAGE INSTRUCTIONS

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Requisitions ▾ > Add/Update Requisition

**UHS FINANCE**

Form | Schedule | Approval | Documents | TIBH Verify | **Contract**

Business Unit: RC730 Requisition Date: 12/10/2019  
Requisition ID: NEXT Status: Open

**Contracts**

SetID 00797

\*System Generated ID  🔍

**Add a New Contract**

Save Notify Refresh

Form | Schedule | Approval | Documents | TIBH Verify | Contract

Leave this field "as is". The system will automatically assign a number. You will enter the contract number (K number or department assigned number) later.

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**Step 4:** Fill out all the applicable fields. Use the following definitions to determine what information needs to be entered.

Contract Info

Requisition

Documents

SetID      00797

System Generated ID      NEXT      Approval Status      Initial ▼

**A**

\*Contract ID     

\*Subject     

\*Competitively Procured       **D**

\*Agency Approval Date       **F**

\*Award Date      10/07/2022 **G**

\*Expiration Date       **H**

\*Department       **K**

\*Current Value     

\*Maximum Value       **L**

Solicitation Posting Date       **M**

\*Number of Bids Recieved     

\*Solicitation Number      N/A **N**

Entered on      **O**      10/07/2022

Entered by      0088186

**B**

Amended

Revenue Generating

Supplier ID       **I**

Address       **J**

**C**

**E**

(A) Contract ID	Use the Contract ID (K Number) assigned by the OCA. Use department-assigned contract number <u>only</u> if there is not a K number available. The K number or department-assigned number must be stamped on all contract documents in order for approver to verify contract ID entered in the UHS contracts page is correct.
(B) Amended	Select Amended only if contract has been amended.
(C) Subject	The subject provides a description of the contract’s general purpose. Example: Data analysis and research study
(D) Competitively Procured	This field is used to differentiate between competitively and non-competitively procured contracts.
(E) Revenue Generating	Check this box for revenue contracts only
(F) Agency Approval Date	The Agency Approval Date specifies the date on which final approval was given to proceed with contracting for the purchase or sale of goods and/or services. The Agency Approval Date cannot be later than the Solicitation Post Date or the Award Date. Please use one of the options below: <ul style="list-style-type: none"> <li>▪ Formal bid (\$25K)- Use date formal solicitation was posted to the ESBD (info can be obtained from buyer).</li> </ul>

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	<ul style="list-style-type: none"> <li>▪ Informal bid (\$15K - \$25K) – Use date bids were requested from vendors.</li> <li>▪ Sole source or emergency – Use the date Purchasing signed the sole source justification form or approved the emergency purchase.  <a href="https://www.uh.edu/office-of-finance/purchasing/Forms/rev_request-for-sole-source-purchases.pdf">https://www.uh.edu/office-of-finance/purchasing/Forms/rev_request-for-sole-source-purchases.pdf</a></li> </ul>
(G) Award Date	The Award Date is the date the University executed (signed) the contract.
(H) Expiration Date	The Expiration Date is the date when the contract will end pursuant to its terms and conditions.
(I) Vendor ID	The Vendor ID is the unique number assigned to vendors that receive non-payroll payments from UH System.
(J) Address	The Address is the vendor address listed on contract. If address is not found use the same address as PO.
(K) Current Value	The Current Contract Value includes the value of the contract, any amendments, and any exercised extensions or renewals.
(L) Maximum Value	The Maximum Contract Value field should include the value of the contract, amendments, and all potential extensions or renewals that have not been exercised. The total amount both currently and potentially obligated.
(M) Solicitation Posting Date	The Solicitation Posting Date is the date the solicitation was posted for public bidding OR leave blank if not applicable. This is normally found on the first page of the RFP/RFQ or ITB or contact your buyer.
(N) Number of Bids Received	Contact your buyer for this information
(O) Solicitation Number	Enter solicitation number or NA if not applicable. This info can be obtained from the formal solicitation (RFP, RFQ, ITB) or contact your buyer.

**Step 5:** Attach contract files.

**Step 6:** Save & Submit.

# UHS CONTRACTS PAGE INSTRUCTIONS

## Instructions for entering a Contract without a Requisition

**Step 1:** In PeopleSoft from the Main Menu go to Purchasing – UHS Contracts – UHS Contract Entry.

**Step 2:** Select Add a New Value and click add.

**Create Contracts**

Find an Existing Value   Add a New Value

SetID: 00797 🔍

System Generated ID: NEXT

Add

**Step 3:** Follow steps 4 through 6 above.