



**Activity:**            **Contract Entry**  
**Menu > Financials > Purchasing > Contract Management > Contract Entry**

**Header:**

1. To add a new contract, click the **green + Add** icon
2. Click **+1** to the right of the contract field for the system to assign the next contract number
3. Tab to **contract method** and select from the list shown below by using the dropdown arrow (defaults to Not to Exceed)
  - a. Not to Exceed – must have annual dollar value
  - b. Item/Qty/Cost/Disc – must have line items with quantity or unit prices
  - c. Encumbered Accounts – must have accounts and amounts
  - d. Items with Encumbered Accts – must have accounts and amounts per item
  - e. Non-encumbered Accounts – contract is encumbered as PO's are issued against it
  - f. Items with Non-Encumbered Accts – must have accounts and amounts per item
  - g. Amounts by Segments – can define a set of general ledger accounts to use
  - h. Items with Account Segments – must have items and amounts, restricted to account segments
4. Tab to vendor and enter number if known or search for the vendor by clicking ... (ellipsis)
  - a. Type in part of the vendor's name, click **Accept**
  - b. Highlight the vendor line and click **Accept**
  - c. System will bring the selected vendor number into the contracts screen, press **tab**
5. Check **To Be Rolled** if remaining contract amount will carry-over from one fiscal year to the next. Leave **unchecked for all fundraisers**.
6. Tab through **Hold payments** unless invoices are not to be posted against this contract, press **tab**. The cursor moves to the fields on the Main tab.

**Complete Main Tab:**

1. Enter department (cost center) number
2. **Tab** past Bid/RFP
3. If a capital project is applicable, select it from drop-down box
4. **Tab** to description and enter a brief description of contract services
5. **Tab** through year and period (these fields will default in)
6. Select appropriate **contract type** from drop-down box, press **tab**
7. Select appropriate **review code** from the drop-down box, for a **contract that spans over multiple fiscal years**
  - a. **MYEC** - Multi Year Encumbered Contract: This is for contracts where funding is **specific to a fiscal year** and all funds **are not** provided up front. For this contract do **not check** To be rolled on the header.
  - b. **MYFE** – Multi Year Fully Encumbered: This is for contracts where all funding is budgeted up front and the encumbered balances need **to roll forward** until the contract is completed. (e.g. construction). For this contract **check** To be rolled on the header
  - c. **MYNE** – Multi Year Not To Exceed (**not to be rolled**). For this contract do **not check** To be rolled on the header.
8. **Tab** through percent
9. Select **contract administrator** by entering a valid Munis user ID or by clicking ...(ellipse) to select from a list
  - a. If the ellipsis was used to find a user ID, highlight the selected user ID and click **Accept** to bring the administrator name to the contract screen
10. **Tab** to the estimated start date field and enter the **estimated start date**, press **tab**
11. Enter the **estimated completion** date, press **tab**
12. Click **Accept**; system moves to the Amounts tab

**Complete Retainage Tab**

1. Retainage is typically only used on **construction contracts**, click **Accept**. The system will proceed to the amounts tab.

### Complete Amounts Tab

1. Enter the current year, press tab
2. Enter the **dollar value** of the contract (enter \$1 for Fundraisers), click **Accept**
  - a. If **tab** is accidentally pressed at this point, the year on the next line will automatically populate, click **Accept** and the system will remove the line.
3. The system will return to the Main tab. At this point, review the data and upload the **signed contract** and **attachments** to the Attach function (paper clip icon)
  - a. Click on the paper clip icon.
  - b. Highlight **Contract Attachment**.
  - c. Click **View Documents**
  - d. Click **New**
  - e. Click **Import**
  - f. Attach document
  - g. Click **Save**
  - h. Close viewer

### Final Step

1. Click **release** in the ribbon. This will send the contract through workflow.

After the contract is released, click on **approvers** at the bottom of the contract entry page. This will show the approvers in the workflow path. Please note that all contracts currently go to Debbie Reaves in Purchasing.



- Contract must be **approved prior** to entering a requisition.
- Approval of a contract delivers a **notification** on the dashboard.
- If a contract is **rejected**, an e-mail notification will be sent. To make corrections to a rejected contract, click **activate** in the ribbon.
- If using the Attach function, **label the document(s)** description on the right-side of the screen.
- Make sure contract is **signed** by the vendor **and** administrator **prior** to uploading to the Attach function.
- If the contract requires an **Attachment A**, Purchasing will reject, returning it with the proper attachment for the vendor and administrator's signatures.
- If contract is related to **out of county travel**, upload leave forms to the Attach function.
- If contract is **over quote threshold**, include quotes in the Attach function.
- District **approved contract forms** are available at <http://www.pasco.k12.fl.us/purchasing/contracts>
- Allow approximately three weeks **prior** to effective date for contract processing.
- Make sure fingerprints, if applicable, are done **prior** to contract entry.
- Request **insurance documentation**, if applicable, and upload to the Attach function with contract.
- Contracts **will not be approved** if service/items have already been received.
- After notification of approval, the completed contract will be in the Attach function. It is the **responsibility of the requestor** to submit to the vendor.