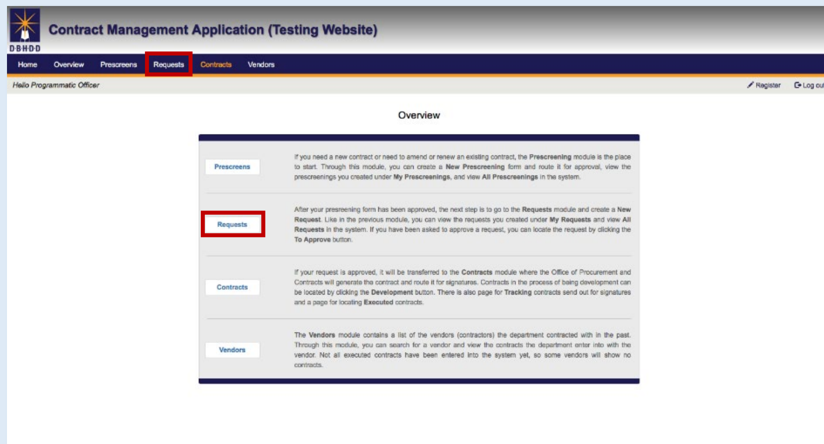
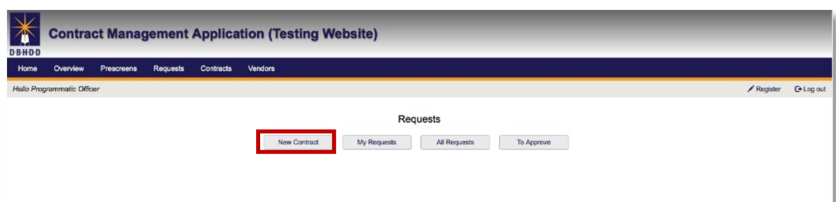
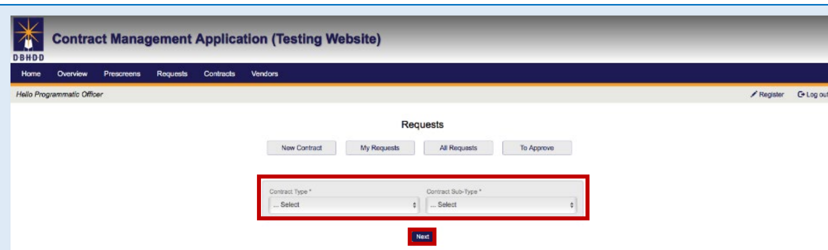
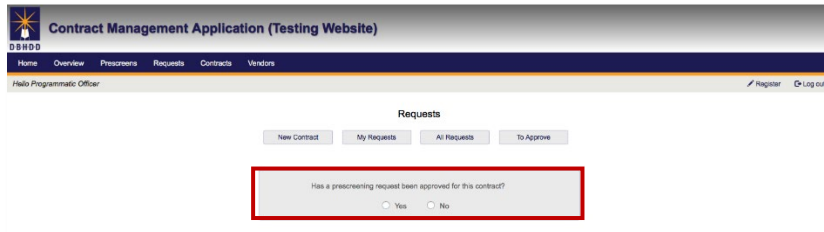
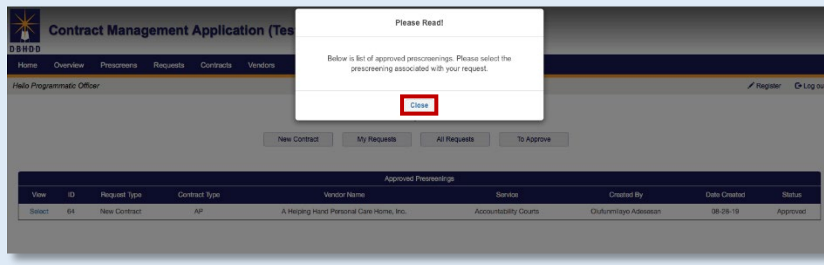
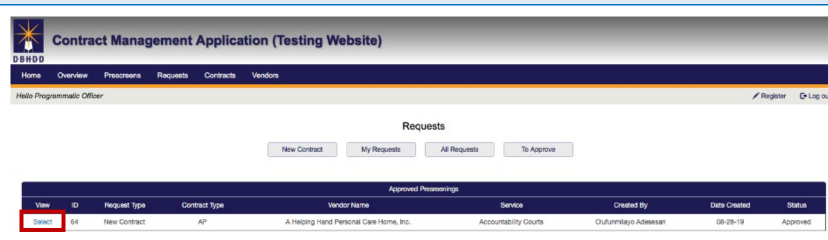
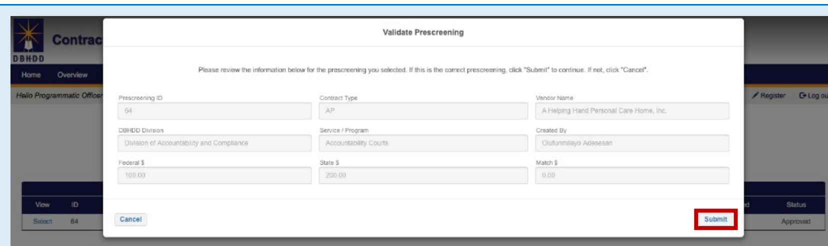
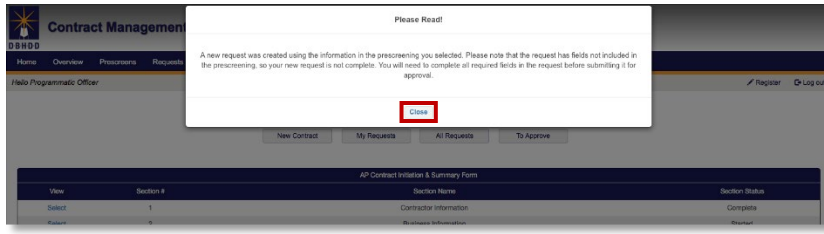
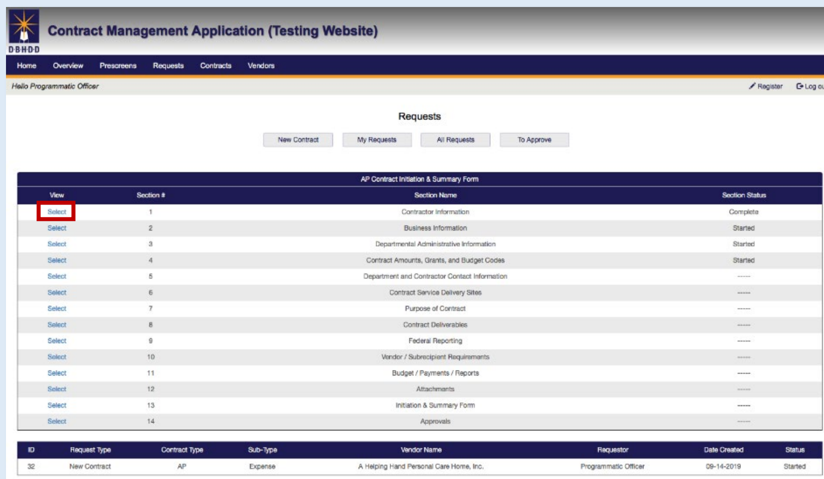
Creating New AP Contract Requests

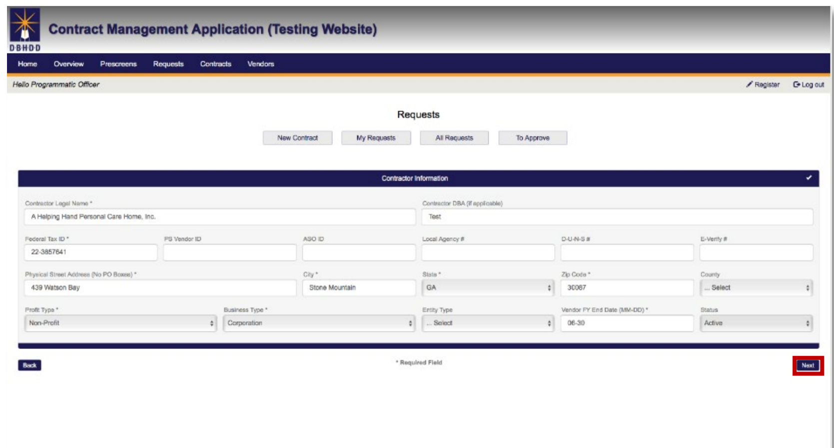
SUMMARY

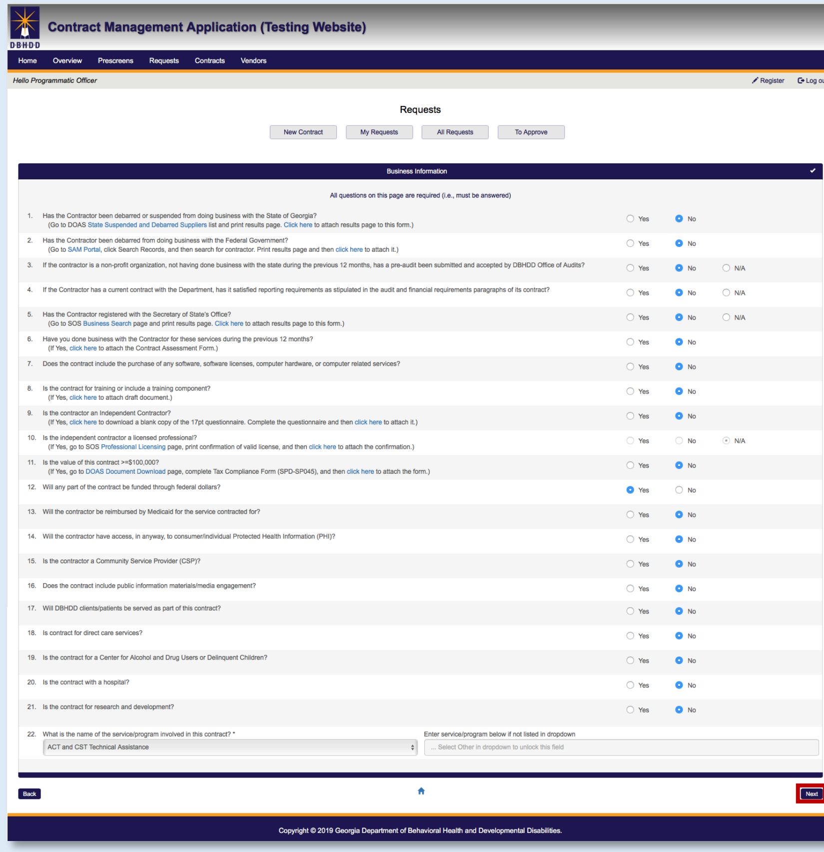
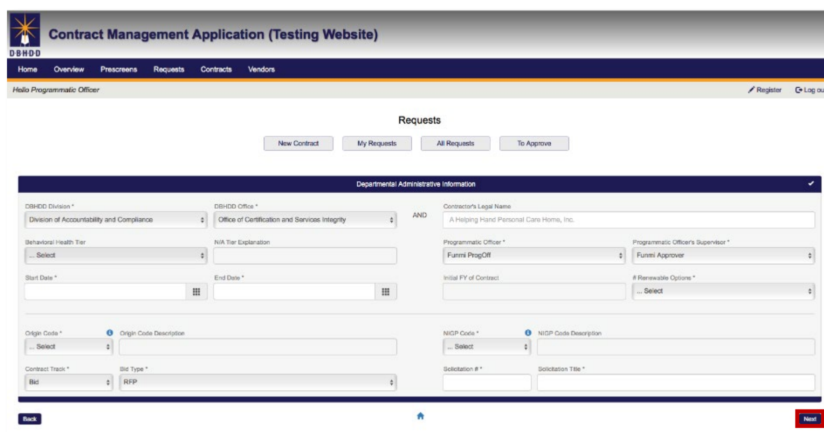
This job aid shows how to create a new AP Contract Request.

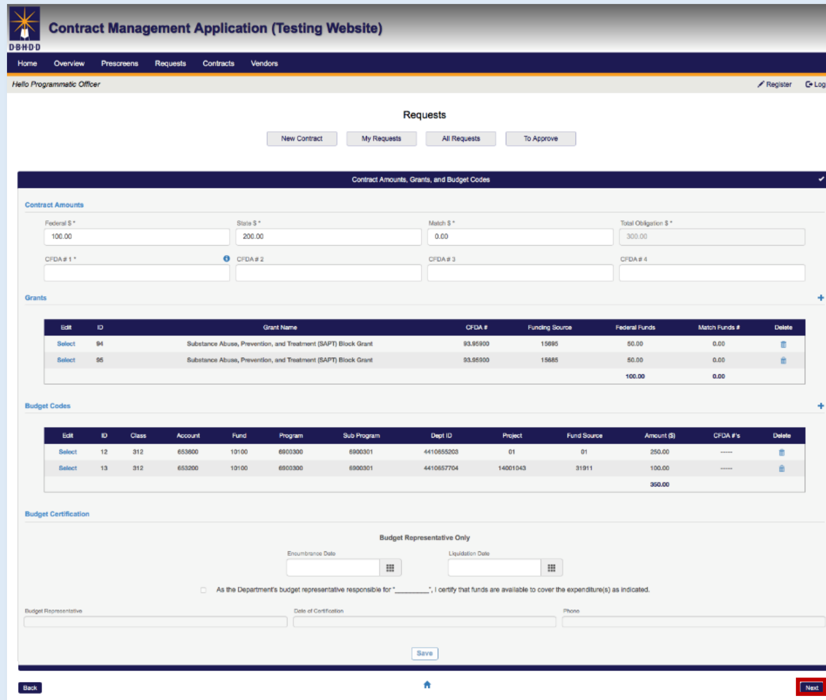
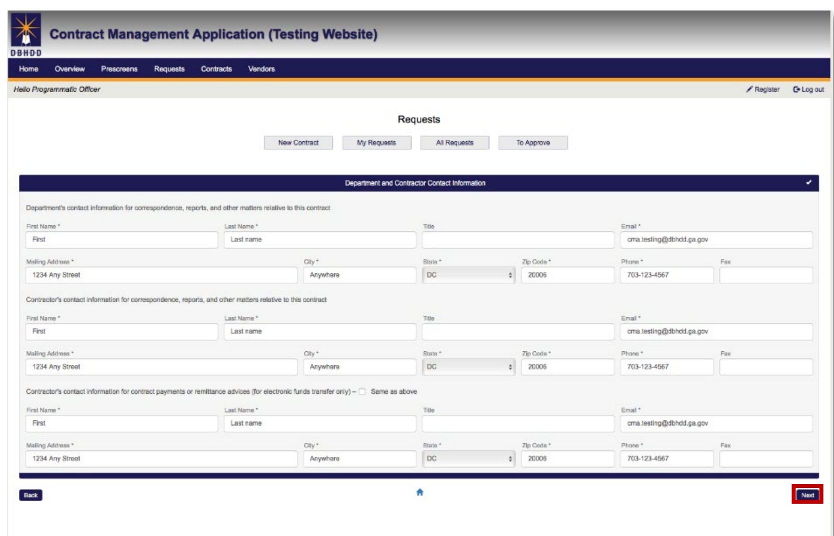
Step	Action	Visual
1	From the **Overview** page, select the **Requests** button or the **Requests** link.	
2	From the **Requests** page, select the **New Contract** button.	
2a	Select the dropdown arrows to choose the **Contract Type** and **Contract Sub-Type.** Select **AP** from the **Contract Type** dropdown menu and the relevant option from the **Contract Sub-Type** dropdown menu. Select the **Next** button.	

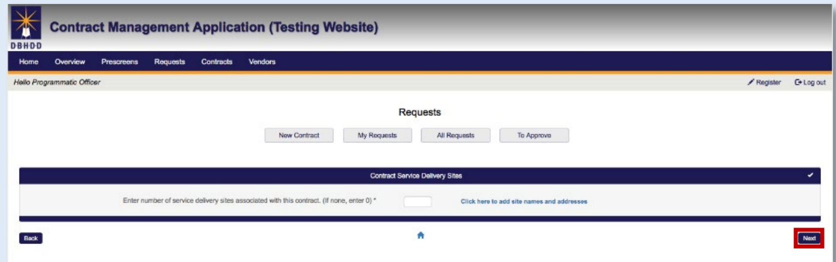
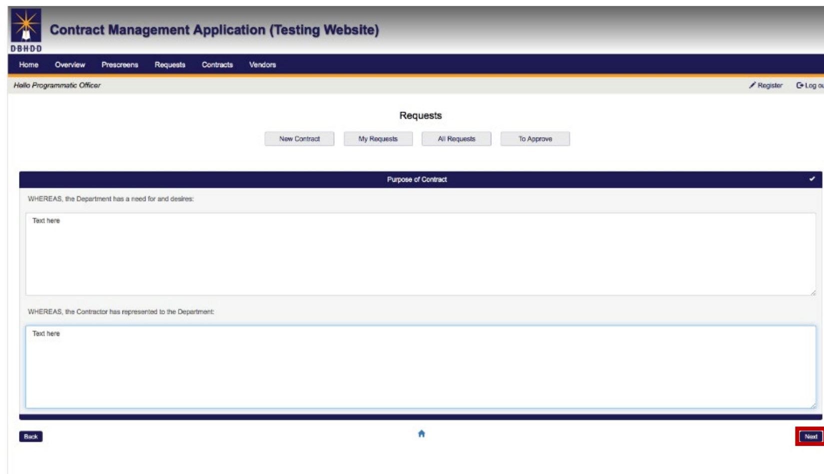
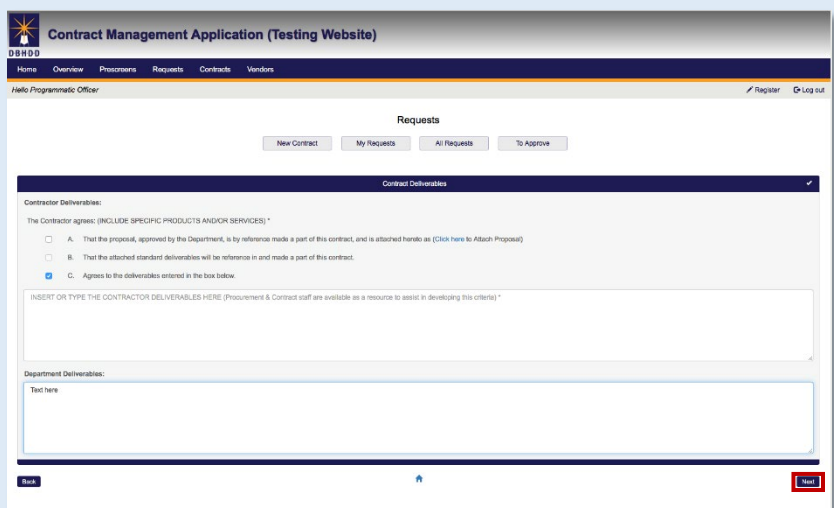
Step	Action	Visual
2b	The prescreening confirmation question appears. The prescreening confirmation requires a **Yes** or **No** response to determine whether a Prescreen was approved. Select **Yes** to the question "**Has a prescreening request been approved for this contract?**" **NOTE:** Regional Contracts do not require a Prescreen since those are initiated by the Contract group.	
2c	The following **Please Read!** message appears: "**Below is a list of approved prescreenings. Please select the prescreening associated with your request.**" Select the **Close** button. A list of approved Prescreens display. **NOTE:** If the response is **No**, the system will direct you to complete a Prescreen to continue the new AP Contract request.	
3	To convert a Prescreen to a New Request, choose the Prescreen from the **Approved Prescreenings** list by selecting the **Select** link on the far left of the Prescreen.	
3a	The **Validate Prescreening** message appears: "**Please review the information below for the prescreening you selected. If this is the correct prescreening, click 'Submit' to continue. If not, click 'Cancel.'** " Select the **Submit** button.	

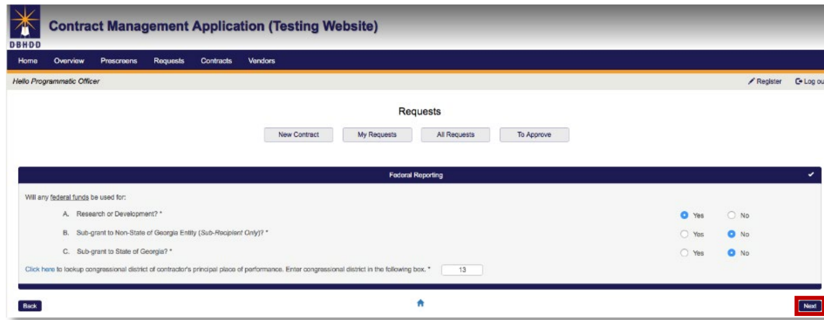
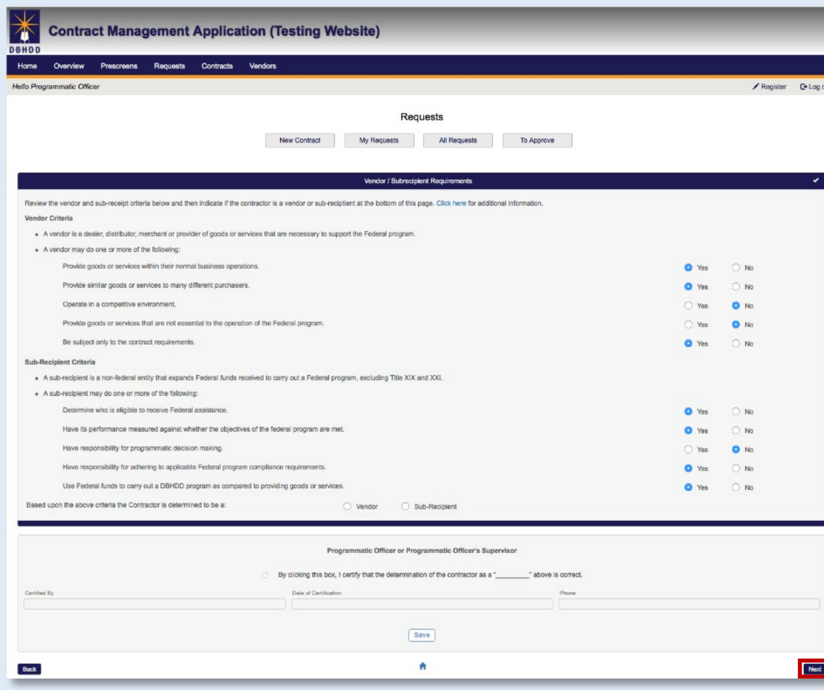
Step	Action	Visual
3b	The **Please Read!** message appears stating: "**A new request was created using the information in the prescreening you selected. Please note that the request has fields not included in the prescreening, so your new request is not complete. You will need to complete all required fields in the request before submitting it for approval**." Select the **Close** button.	
4	The **AP Contract Initiation & Summary Form** list displays. Select any section from the **AP Contract Initiation & Summary Form** or start from **Section #1** to complete the request. The **Section Status** will update as you progress through each section and may display as: • **Complete** – Completed section, no additional action required • **Started** – Incomplete section, started and additional action required • **'-----'** – Incomplete section, action required • **Certification Required** – Incomplete section, certification required from the appropriate role Select the **Select** link to the far left of the **#1** section row. You can review or edit the section information. The sections may include auto-populated information from the selected Prescreen. Located on the section pages are: • **Back** button — Navigates to the previous screen • **Home** icon — Navigates to the home screen • **Next** button — Navigates to the next section/screen	

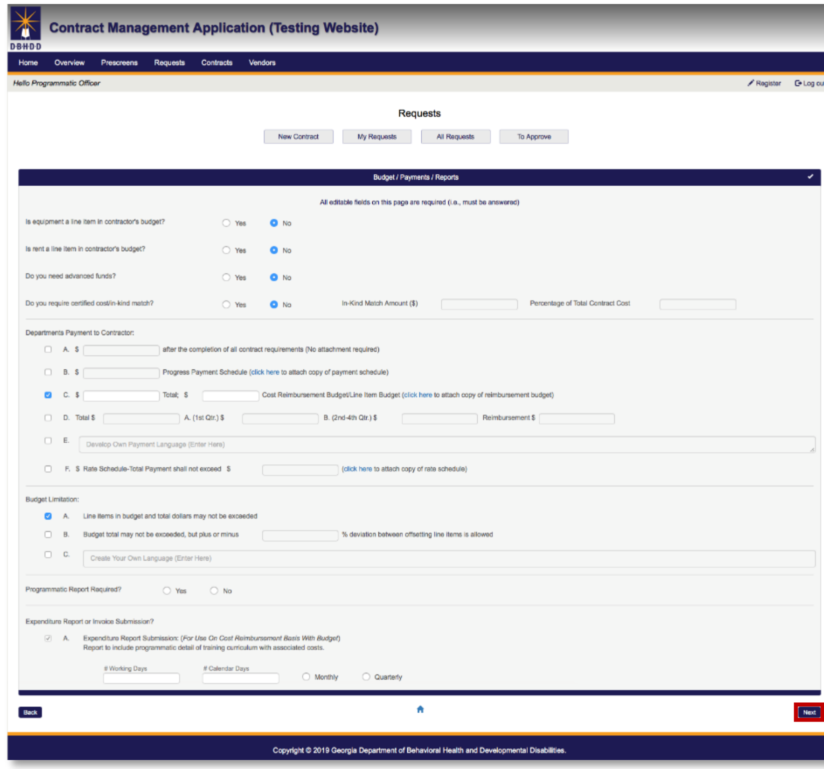
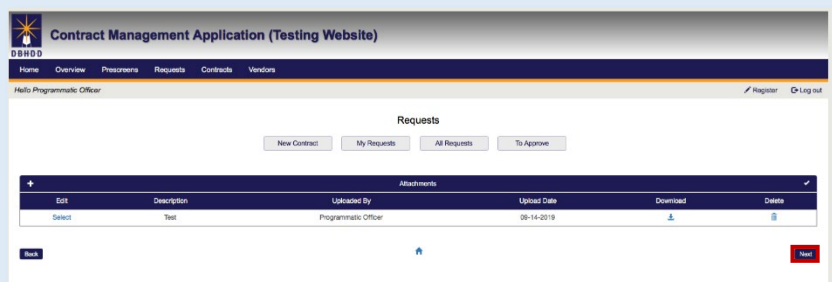
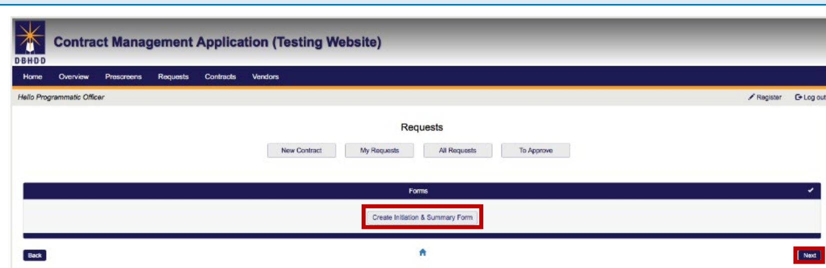
Step	Action	Visual
	• ✓ **Validation** icon — Identifies errors or omissions in the section NOTE: The **Requisition Number/Transfer Request** section appears after the **Approvals** section is complete.	
5	The first section is the **Contractor Information**. This includes auto-populated information from the Prescreen. Review the contract data for accuracy, and enter corrections, if applicable. Select the **Next** button. NOTE: By default, this **Section Status** may display as **Complete** because the Prescreen information populated all required fields.	

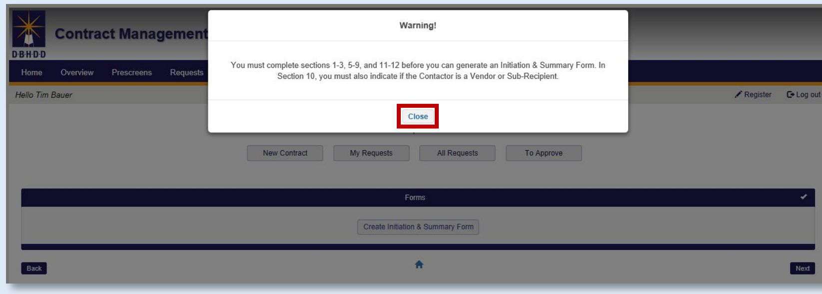
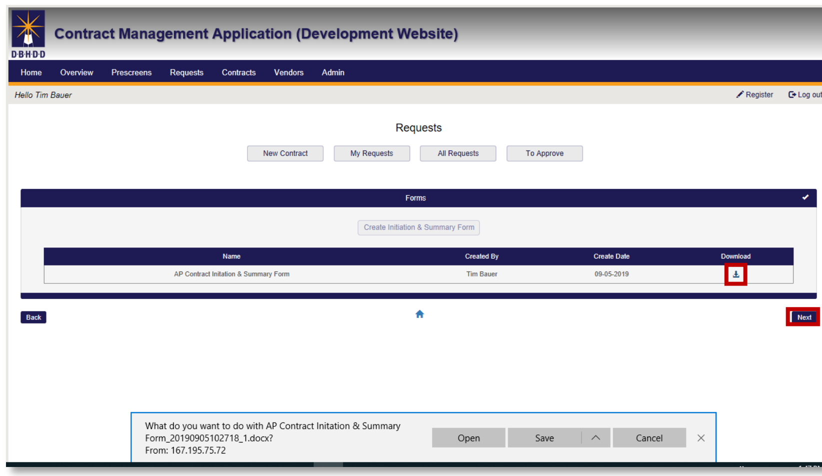
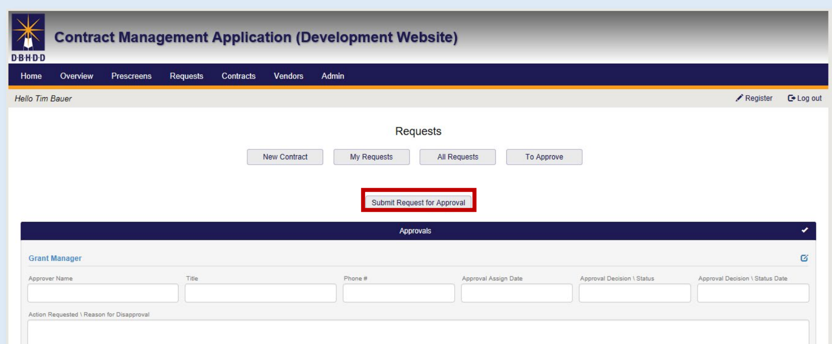
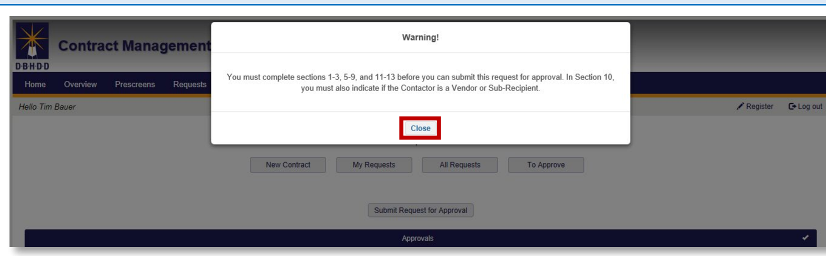
Step	Action	Visual
6	The **Business Information** section includes auto-populated information from the Prescreen. Select **Yes, No,** or **N/A** for each question listed in the section. Select the **Next** button. NOTE: The **Business Information** section will require documentation (an attachment) based on the responses to specific questions. You can upload (attach) specific documentation for each question by selecting the **click here** link.	
7	The **Departmental Administrative Information** section includes auto-populated information from the Prescreen. Complete and review the departmental administrative data for accuracy, and enter corrections, if applicable. Select the **Next** button. NOTE: The **Information** icon provides additional details about completing the field.	

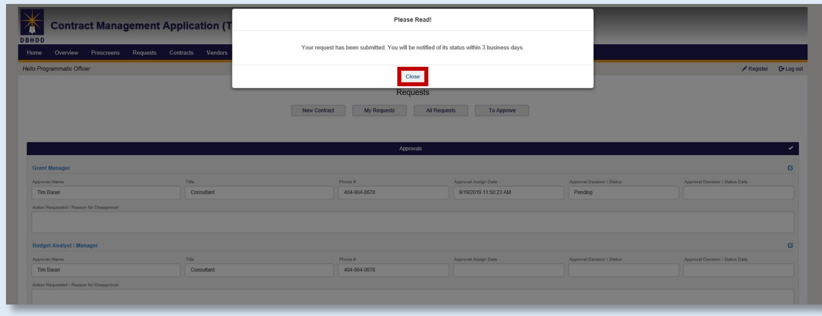
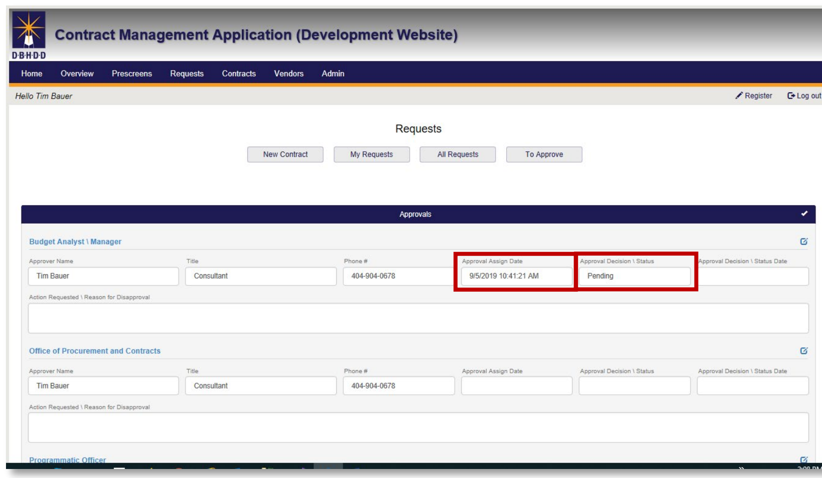
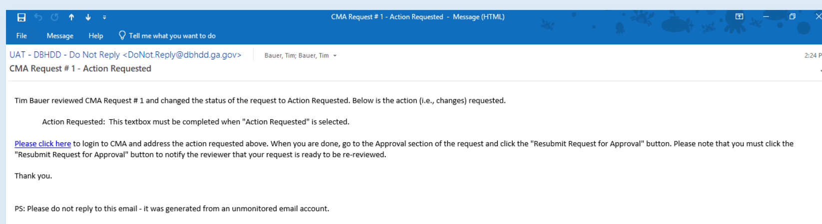
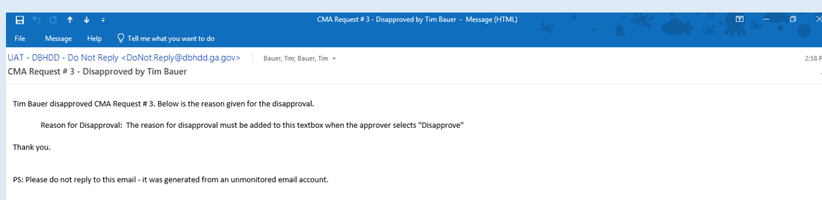
Step	Action	Visual
8	The **Contract Amounts, Grants, and Budget Codes** section includes auto-populated information from the Prescreen. Complete and review the data for accuracy, and enter corrections, if applicable. The **Budget Representative Only** section requires certification. Select the **Next** button. **NOTE:** The **Section Revision History** link is present when changes, such as amounts, are made to the prescreening data.	
9	In the **Department and Contractor Contact Information** section, complete each required (*) data field. Select the **Next** button.	

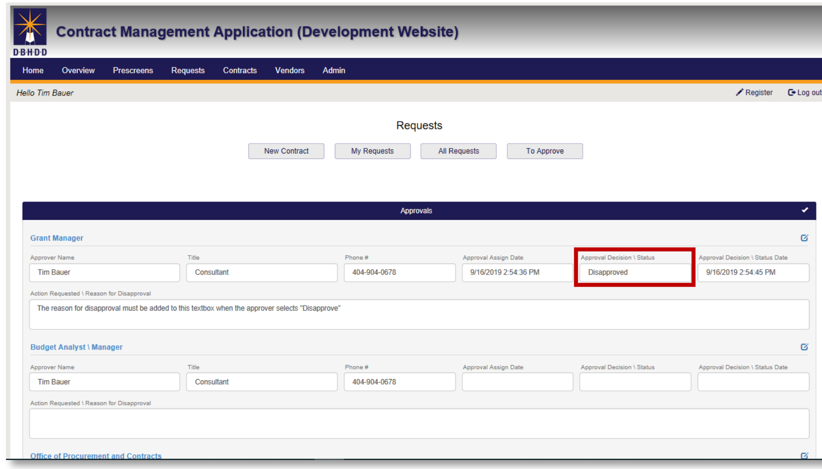
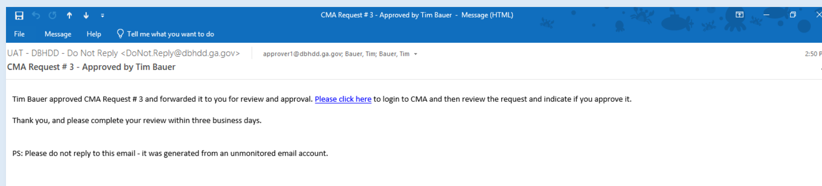
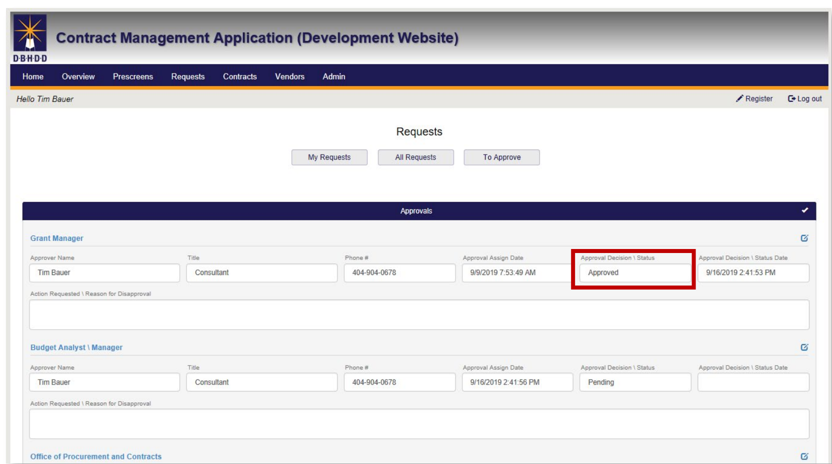
Step	Action	Visual
10	In the **Contract Service Delivery Sites** section, enter the number of service delivery sites. If there are none, enter **0**. Select the link to add a name and address for each service delivery site, if applicable. Select the **Next** button.	
11	In the **Purpose of Contract** section, complete each data field. Select the **Next** button.	
12	In the **Contract Deliverables** section, complete each required (*) data field. Select the **Next** button. **NOTE:** This section may require a proposal (attachment) based on the responses to specific questions. You can upload (attach) specific documentation for each question.	

Step	Action	Visual
13	In the **Federal Reporting** section, complete each required (*) data field. Select the **Next** button. **NOTE:** This section needs to be completed in its entirety when federal funding is included.	
14	In the **Vendor / Subrecipient Requirements** section: • Select **Yes** or **No** to each statement listed in the section. • Select **Vendor** or **Sub-Recipient** for the contractor criteria statement. The **Programmatic Officer** section requires certification. Select the **Next** button. **NOTE:** This section needs to be completed in its entirety.	

Step	Action	Visual
15	In the **Budget / Payments / Reports** section, complete each required data field and question. Select the **Next** button. **NOTE:** This section will require documentation (an attachment) based on the responses to specific questions. You can upload (attach) specific documentation for each question.	
16	The **Attachments** section displays a list of all attachments uploaded to the request. Review the list for accuracy and/or add any documentation needed. Select the **Next** button. **NOTE:** The **+** plus icon opens the **Upload File** field to add an attachment.	
17	In the **Forms** section, select the **Create Initiation & Summary Form** button to create the **AP Contract Initiation & Summary Form**. Select the **Create Initiation & Summary Form** button to create the **AP Contract Initiation and Summary Form.** Select the **Next** button.	

Step	Action	Visual
17a	**NOTE:** If any sections are incomplete, a **Warning!** message appears indicating which sections must be completed. Select the **Close** button and complete the sections noted in the **Warning!** message.	
18	When the **AP Contract Initiation & Summary Form** displays, select the **download** icon and open or save the form as a Microsoft Word document to review. Select the **Next** button.	
19	The **Approvals** section displays a list of all required approvers by title and/or name. Select the **Submit Request for Approval** button.	
19a	If any sections are incomplete, a **Warning!** message appears indicating which sections still need to be completed. Select the **Close** button and complete the sections noted in the **Warning!** message.	

Step	Action	Visual
19b	Select the **Close** button below the **Please Read!** message stating: "**Your request has been submitted. You will be notified of its status within 3 business days**."	
19c	After successful submission, the **Approval Assign Date** field is time stamped, the **Approval Decision \ Status** field reads as **Pending**, and approval-required email(s) are sent.	
20	Each approver receives an email to respond to the request. If an approver selects **Action Requested** or **Disapproved,** a note of the needed changes must be entered, and no other approvals are allowed until those changes are complete.	 

Step	Action	Visual
20a	The requestor receives a notification of the decision and can take corresponding action on the request. If any change is made to the request, the application restarts the approval process. Select the **Home** icon. **NOTE:** Only the Contract Manager can change an approval, which resets all required approvals. If you are the requestor and required approver, you can complete the approval in the **Approvals** section.	
20b	If an approver selects **Approved**, then the requestor will receive an email stating that the request has been approved.	
20c	The **Approvals Decision \ Status** can also be viewed on the Approvals subsection.	

Step	Action	Visual
21	The **Requisition Number/Transfer Request** section is present after all approvals are granted. Enter the **Requisition Number** and save. The contract number auto-populates and the new AP Contract request is ready for the Office of Procurement and Contract staff to authorize a transfer to the Contract Module for development. **NOTE:** If the requestor submitted the requisition, then the **Requisition Number** is available to him/her.