



INSTRUCTIONS FOR 2024/25 CONTRACT AND SERVICE ORDER RENEWALS

Get your annual department contracts ready for the new fiscal year!

Definitions:

New Year = Fiscal year 7/1/2024 to 6/30/2025

Current Year = Fiscal year 7/1/2023 to 6/30/2024 (a.k.a. "old year")

New Year Order = Annual orders for services that **begin** after 7/1/24 and that will be in place for the upcoming fiscal year

Critical Renewal = Orders that need to be in place on or before July 1 for continuity of service and warranty, or to avoid cancellation, i.e. software license or maintenance agreement. These are generally **not** blanket orders.

Standard Renewal = Examples: equipment maintenance agreement, software maintenance agreement, shredding services, general blanket-type services that occur throughout the year.

STEP ONE

Determine & Prioritize your department New Year renewal contracts:

- Your department may have an established list, or you can review orders from previous fiscal year. You can also use other tools such as [Insight](#). For assistance, contact your Procurement Specialist.
- Categorize your list of renewals – Standard & **Critical**
- Determine if your new year agreement needs an [ITPR](#), and if so, enter ASAP
- Contact the supplier and ask for a quote for the upcoming service term

STEP TWO

Work with your Procurement Specialist on strategies for **Critical** New Year Renewal Needs:

- Send your list of **Critical Renewals** to your Procurement Specialist ASAP for review
- Meet & discuss strategy for these renewals with your Procurement Specialist

STEP THREE

Collect information and enter Standard New Year Renewals in CSUBUY:

- Choose the most appropriate form in CSUBUY for the service needed. New Year renewals will likely use one of the following forms: *Goods & Services Request*, *IT Software Request*, or *Independent Contractor Request*.
- Search for supplier; If supplier is not in CSUBUY request the supplier ASAP
 - **Pro Tip:** make sure that the email address used to request the supplier is for the person at the company (usually in accounting or finance department) that understands the structure of the company, their tax information, and has access to their banking information if they would like to be paid electronically.
- Enter requisition using appropriate CSUBUY form with the following additional information.



The first part of this example is using a *Goods & Services Request Form*

GENERAL INFORMATION

- General Information Page:
- Enter previous annual purchase order (this will be a PO number from CFS)
- Enter the performance start and end dates – for an annual purchase order enter 07/01/2024 – 06/30/2025

Is this a Blanket Order? *

Yes No

Is the request for a renewal of a previous purchase?

Yes No

If available, provide the previous purchase order (PO) number.

Does the request include performance terms (start & end date)? *

Yes No

Performance Start Date
mm/dd/yyyy

Performance End Date
mm/dd/yyyy

COST DETAILS

- On the Cost Details page:
- Unit of Measure – select Lot
- Product Description – Enter a detailed description of the service (5 W's)
- Enter the start and end dates - for an annual purchase order enter 07/01/2024 – 06/30/2025
- Select the most appropriate category code.

▼ **Services - Other**

Services - Other Cost Details

Unit Price ★	<input type="text" value="500.00"/>	USD	Quantity ★	<input type="text" value="1"/>	Total	500.00 USD
Unit of Measure ★	<input type="text" value="LO - Lot"/>					
Product Description ★	<input type="text" value="24/25 Maintenance Services for LX325 Microscope located in Plumas 123. Maintenance per attached scope of services BE SPECIFIC - WHO WHAT WHERE WHEN WHY"/>					
Service Start Date	<input type="text" value="07/01/2024"/> <input type="button" value="📅"/> <small>mm/dd/yyyy</small>					
Service End Date	<input type="text" value="06/30/2025"/> <input type="button" value="📅"/> <small>mm/dd/yyyy</small>					
Taxable	No					
Catalog No.	<input type="text"/>					
Commodity Code ★	160001 - General Services <input type="button" value="Edit"/>					



REVIEW AND SUBMIT:

Review and Submit Request Actions ▾ | History | ?

✓ Required Fields Complete

Section	Progress
Suppliers	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

◀ Previous
Add to Favorites
Add and go to Cart ▾

- Add and go to Cart
- Save to Cart and Add Another
- Add to Cart and Return
- Add to new Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision

- Select **Add and go to Cart** or **Save to Cart an Add Another** if you have additional lines to enter

Once in the Shopping cart – these next steps will apply to any form used for a New Year Order – Ex: IT Software Request, Independent Contractor

SHOPPING CART:

- Cart name - available for department specific use. Example:

Shopping Cart • Shopping Cart

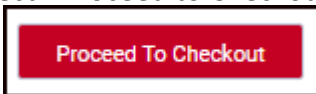
Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name

Deliver To Location

- Item Details - verify commodity codes are correct
- Select - Proceed to Checkout





REQUISITION SUMMARY:

- Edit Billing information: - select the pencil icon

Requisition - 186930600

Summary | Taxes/Stat | PO Preview | Comments | Attachments | History

General Information	Shipping Information	Billing Information
Transaction Details Cart Name: Outdoor Lab Annual Contract - Professor Smith Business Unit: Cal State Univ, Chico P2P (DHX00)	Ship To Contact: Sara Rumiano 540 West 1st Street Chico, CA 95929 United States Delivery Information Deliver To Location: KNDL206_CHICO Ship Via: Best Carrier-Best Way Due Date: no value	Bill To Accounts Payable 400 West 1st St. Chico, CA 95929 United States PO Details Accounting Date: no value PO Type: no value Amount-Only / Blanket PO: <input checked="" type="checkbox"/> Multi-Year PO: <input type="checkbox"/> Terms/FOB Override Needed: <input checked="" type="checkbox"/> Reference ID: no value Do Not Distribute: <input checked="" type="checkbox"/> Tax Code: no value

Edit Billing Information

CSU Chico - Campus Bill To - Accounts Payable, 400 West 1st St., Chico, CA 95929, United States

Search additional [] Results Per Page 10

PO Details

Accounting Date: 07/01/2024

PO Type: []

Amount-Only / Blanket PO:

Multi-Year PO:

Terms/FOB Override Needed:

Reference ID: FY 24/25

Do Not Distribute:

Tax Code

Tax Code: []

★ Required fields [Save] [Close]

- Accounting Date - Enter **07/01/2024**
- Amount-Only/Blanket PO - select the field
- Reference ID - Enter **"FY24/25"**

OTHER PARTICIPANT INFORMATION:

- Edit Internal Notes and Attachments:

Chartfield

Values vary by line.

Other Participant Information	Internal Notes and Attachments	External Notes and Attachments
Prepared by: Sara Rumiano	Internal Note: no value	Note to all Suppliers: no value
Prepared for: Sara Rumiano	Internal Attachments: Add	Attachments for all suppliers: Add



Edit Internal Notes And Attachments

Internal Notes & Attachments

Internal Note: FY24/25 ORDER

987 characters remaining expand | clear

Save Close

- Internal Note - enter “FY24/25 ORDER” and **Save**
- Internal Attachments – select **Add**

Add Attachments

Attachment Type: File Link

File(s) ★

Drop File or [Browse](#)

Max. File Size: 24.51 MB

★ Required fields

Save Changes Close

- File(s) - attach supplier quote, contract, or other pertinent information and **Save Changes**



ITEM DETAILS:

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price																			
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Goods and Services Request ... </div> <div style="margin-top: 5px;"> <p>Contract: <i>no value</i></p> </div> </div>																								
1	24/25 maintenance agreement for lawnmower (G6578) per attach scope of services	LO	2,000.00	1	2,000.00	...																		
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> ITEM DETAILS ✎ </div> <div style="margin-top: 5px;"> <table border="0" style="width: 100%;"> <tr> <td style="width: 20%;">Service Start Date</td> <td style="width: 20%;">2024-07-01</td> <td style="width: 20%;">Commodity Code</td> <td style="width: 20%;">145004 / Equipment Maint/Repair</td> <td style="width: 10%;">Taxable</td> <td style="width: 10%; text-align: center;">✗</td> </tr> <tr> <td>Service End Date</td> <td>2025-06-30</td> <td></td> <td></td> <td>Asset</td> <td style="text-align: center;">✗</td> </tr> <tr> <td>more info...</td> <td></td> <td></td> <td></td> <td>Asset Profile ID</td> <td><i>no value</i></td> </tr> </table> </div> </div>							Service Start Date	2024-07-01	Commodity Code	145004 / Equipment Maint/Repair	Taxable	✗	Service End Date	2025-06-30			Asset	✗	more info...				Asset Profile ID	<i>no value</i>
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more info...				Asset Profile ID	<i>no value</i>																			
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> TAX CODE Values have been overridden for this line ✎ 🗑 </div> <div style="margin-top: 5px;"> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Tax Code</td> <td style="width: 40%;">CHC Chico Sales Tax</td> </tr> </table> </div> </div>							Tax Code	CHC Chico Sales Tax																
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- Verify line information is complete
- Verify taxability – the red X means that there is no tax
- Save

CHARTFIELD:

- Enter appropriate chartfield information – select the pencil to change

CHARTFIELD								Values have been overridden for this line ✎ 🗑
Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project	
CHICO California State Univ, Chico	G1006_CHICO CSU OPERATING FUND	D14000_CHICO Procurement Services	660003_CHICO Supplies And Services	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	

- Submit request -



Helpful Links and Resources:

ITPR Renewal Request:

<https://support.csuchico.edu/TDClient/1984/Portal/Requests/ServiceCatalog?CategoryID=14504>

Insight Reporting: <https://www.csuchico.edu/fin/insight-reporting.shtml>

Forms, Policies & Procedures: <https://www.csuchico.edu/fin/resources/forms.shtml>

Fiscal Year End Schedule: <https://www.csuchico.edu/fin/fiscal-schedule.shtml>

Procure to Pay Team Contacts: <https://www.csuchico.edu/purc/procure-to-pay.shtml>

CSUBUY P2P Campus Website: <https://www.csuchico.edu/purc/csubuy.shtml>