GATEWAY TRAINING GUIDE

Gateway Contract Request Form Instructions

Suggested Form Uses:

- The Contract Request Form should be used to route Professional or Personal services, Hotel, Revenue (Facility Use) and license agreements through Gateway on a purchase order. The submission will result in a PO, and, if applicable, signed agreement, which will be distributed directly to your supplier. In some cases, there will not be a need for a physically-signed contract.
- The use of the Contract Request Form will trigger review by the Procurement Services team, including a step for insurance review.
- Use of this form will provide more transparency into the contract process, as well as house all procurement transactions in one location.

Other notes for use:

- Your supplier will need to be enabled in the system before you will be able to use the form.
- An updated Request for Services Form is located on the Gateway Homepage in the Attachments Section (Form I).
- Gateway does have the functionality for Revenue Agreements (Facility Use and Service agreements that would result in income to UCSB, rather than UCSB pay for services). To submit a Revenue Agreement, complete the form as usual, except type in a zero ($0.00) dollar amount in the Unit Price field. Please reach out to our Procurement Team at contracts@bfs.ucsb.edu with any questions.

Where is the form located?

- From the homepage in Gateway, you can select the Contract Request Form in the Form Section.
Steps to process an order:

- When you click the link, it will bring up the following form for you to fill in according to your contract / agreement.
- As you begin to enter in your supplier, the system will start to pre-populate for you, including the address that the PO needs to be addressed to, and where we will be distributing the purchase order.
- **Enter the Supplier Contact Name and Supplier Contact Email (this is your direct rep).**
  a. This is especially important to fill in since this contact information will be used for DocuSign, our automated e-signature service, which may be utilized in the Contract process. Please use a valid email address; one that will not go to a general email address (i.e.: help@accounting.com).
- **Enter the appropriate start and end dates** for your contract/agreement.
- **Select “Yes” or “No”** to indicate if the supplier will utilize UC supplies or Equipment as part of the contract/agreement.
- **Enter a description** of the work to be performed or any key pieces of information about the contract/agreement.
  a. Please note: As a mandatory piece of this form, you will be required to attach any relevant Request For Services Forms, Supplier Agreements, Scope of Work, etc. If these pieces are already very substantial, this description box can reference the attachments. The Procurement Team will work with you to ensure that this description field includes all relevant information before the purchase order is sent to the supplier.
- **Attach all relevant documentation**, including, but not limited to: Request for Services, Contracts/Agreements, Proposals, Scope of Work, Schedules, etc.

- The form will look like this when complete:
Gateway Contract Request Form Instructions

This form is used to initiate a professional services contract within the Gateway system.

Please note, Procurement Services requires a Request for Service Form (RFS) to every contract request. Please upload the completed form in Internal Attachments, below:

- **Request For Services**
- **Supplier**
- **Fulfillment Address**
- **Supplier Phone**

**Distribution**
The system will distribute purchase orders using the method(s) indicated below:
- Check this box to customize order distribution information.
- **Email (HTML Attachment)**
- **Supplier Contact Name**
- **Supplier Contact Email**
- **Start Date**
- **End Date**

**Will the Supplier Utilize UC Supplies or Equipment?**
- **Description of Services to Be Performed**

**Not to Exceed Grand Total**
- **Unit Price**
- **Quantity**

**Internal Attachments**
- **UCSB Form 1 - Req. (159K)**
Gateway Contract Request Form Instructions

- When complete, scroll back to the top and select “add to cart and go”, and then click the blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.

For questions regarding use of this form please contact:

help@gateway.procurement.ucsb.edu