Published on *University of Colorado* (https://www.cu.edu)

CU Marketplace Training [1]

CU Marketplace Updates and Training Guides

The **Small Dollar Contract Request Form** is live on CU Marketplace. This form streamlines the small dollar contract process into one dedicated submission form for all small dollar procurement contracts $10,000 or less. It eliminates the need to email the various procurement inboxes, consolidates all communications regarding these contracts within Marketplace, and allows the PSC to balance workloads to improve processing times. The form can be found in CU Marketplace and allows more visibility into the contract workflow process and contract status.

Important Notes:

- Only those that have the requestor role in Marketplace will be able to submit small dollar contracts through this process.
- It works much like the supplier request. Form submission means that your small dollar contract form has been sent to the appropriate purchasing agent for review and processing, but it has not yet been fully executed.
- The purchasing agent will confirm with you once the contract has been executed.
- If you need a requisition for the purchase, you will still need to enter the requisition separately.

Please note: submitting the Small Dollar Contract Intake Form does not mean your contract has been fully executed. Form submission means your contract has been sent to the appropriate purchasing agent's queue for review and processing. The purchasing agent will confirm with you once the contract has been executed.

View this 5-minute video which will walk you through the Small Dollar Request Form:

Click here for a step-by-step tutorial: CU Marketplace How-To: Small Dollar Contract Request Form [2]

Small Dollar Contract Request Form FAQ

- Can CU Marketplace Approvers see their department Requestor's small dollar contract form submission queue in CU Marketplace?
    - Only Requestor's can view their respective small dollar contract form queue. Approvers will need to check with their Requestor's on the status of any submissions.
- What does a "completed" status mean when I submit the small dollar contract request

form?
    - “Completed” means the form and any attachments have been successfully submitted to the PSC for review. A purchasing agent will confirm with you once the contract has been fully executed.
- Can a department submit a small dollar contract request when trying to pay a deposit?
    - The PSC does not sign contracts for deposits only. Any deposit required on a contract should be included as part of a full contract review and signature. If the department is trying to submit a small dollar contract request in order to be able to pay a deposit, then the full value of the contract must be under $10,000 in order to qualify for a small dollar contract submission. If the full value of the contract is over $10,000, then the contract must be submitted for review through a purchase requisition.
- I have an existing contract that needs to be amended, should I submit a new small dollar contract request?
    - No, if you have an executed contract, please submit the amendment / change request to changeorder@cu.edu [3] for processing. Any requests submitted through the small dollar request form for amendments / changes will be sent back to be processed as a change order.
- How can I be sure that a comment I submitted on my Small Dollar Contract Request reaches the appropriate Purchasing Agent?
    - In the Discussion tab of the Small Doller Contract Request form, please specifically tag the appropriate Purchasing Agent according to the commodity you selected when creating your SMD request. This can be done by clicking on the magnifying glass and then searching for the Purchasing Agents name. **Please search by last name.** If you are not sure what Purchasing Agent manages the commodity you selected, please verify with this commodity listing [4].

Please Note: Contracts should not be split; should a contract need a deposit, follow the instructions mentioned in the link below for the deposit procedure and add one line for the deposit and one line for the balance of the event on the requisition. All events where the total dollar amount will exceed $10K are required to be on one purchase requisition.? https://www.cu.edu/psc/how-buy-official-functions [5]

Learn how to purchase and pay for items using CU Marketplace.

Requesting a role in CU Marketplace
For a list of training requirements and descriptions of the different CU Marketplace roles, visit the Access & Training Requirements guide [6].

Logging into CU Marketplace
Log in to your campus portal [7] and on the **CU Resources Home** tab, click the **CU Marketplace** tile.

CU Supplier Portal Information

In most cases, external suppliers must register through the CU Supplier Portal in order to be paid by CU. Departments can invite suppliers to register.

- CU Marketplace: Requesting an Honorarium Recipient [8]
- CU Marketplace: Requesting a Purchase Order Supplier [9]

Exceptions - The following do not need to register through the Supplier Portal:

- **Study subjects.** The study subject's paper W-9 (IRS form) [10] must accompany the Study Subject Payment form to ensure that the individual is correctly set up as Clinical Trial supplier.
- **Reimbursements/refunds.**Tax documents are not needed to issue reimbursements (via the Non-Employee Reimbursement-International form) or refunds (via the Payment Authorization form).
- **Stipends and cash awards on the Payment Authorization form.** The payee's paper W-9 (IRS form) [10] must accompany the Payment Authorization form.
- **CU employees** and **CU students** are not considered suppliers.

Updating Your Profile

- Adding SpeedTypes to Your CU Marketplace Profile [11]
- Adding Requestors (Assignees) to Your CU Marketplace Profile [12]
- Adding Ship To Locations to Your CU Marketplace Profile [13]

Shopping (Requisitions)

- Using Non-Catalog Forms [14]
- Creating Payment Vouchers in CU Marketplace [15]
- Creating (or Renewing) SPOs [16]
- Creating (or Renewing) Subcontract SPOs [17]
- Creating Subcontract SPOs with F&A Split [18]
- Creating Sole Source Procurements [19]
- Entering After-the-Fact Purchases [20]
- Forms Quick Reference Guide [21]
- Guided Buying User Guides [22]
- Viewing Contract Comments [23]

- Adding Details to Shopping Carts (such as SpeedTypes and Shipping) [24]
- Splitting Accounting Distributions (SpeedTypes/Accounts) [25]
- Consolidating Shopping Carts [26]
- Copying Requisitions into New Shopping Carts [27]
- Modifying Shopping Carts [28]
- Assigning/ Unassigning Shopping Carts to Requestors [29]
- Assigning Substitute Requestors [30]
- Processing Assigned Shopping Carts [31]
- Withdrawing Requisitions from Workflow [32]

Using Forms

- Forms Quick Reference Guide [21]
- Using Non-Catalog Forms [14]
- Creating Payment Vouchers in CU Marketplace [15]
- Creating (or Renewing) SPOs [16]
- Creating (or Renewing) Subcontract SPOs [17]
- Creating Subcontract SPOs with F&A Split [18]
- Creating Sole Source Procurements [19]
- Entering After-the-Fact Purchases [20]
- Solutions for PVs that Can't be Processed in CU Marketplace [33]

Approving Requisitions

- Approving Requisitions [34]
- Initiating Email Approvals [35]
- Returning Requisitions to Shared Approval Folders [36]
- Assigning Substitute Approvers [37]

Approving SPO Vouchers

- Approving SPO Vouchers [38]
- Initiating Email Approvals [35]
- Placing Vouchers (Invoices) on Hold [39]

Receiving (Creating Quantity Receipts)

- Entering Receiving (Creating Quantity Receipts) for POs [40]
- Documenting Returned Items & Fixing Receipts That Are Wrong [41]_ [41]

Resolving Match Exceptions

- Resolving Match Exceptions [42]
- Placing Vouchers (Invoices) on Hold [39]
- Replying to Comments [43]

Reporting and Checking Status

- Identifying Requestors of POs [44]
- Looking Up Invoices [45]
- PO Status [46]
- Reviewing Incompatible Access Purchases [47]
- Requisition Status and Approvals [48]
- Searching for POs [49]
- Searching for Requisitions [50]

- Transactions on Your Financial Statements [51]
- Using Advanced Document Search [52]
- Viewing Invoice Images [53]
- Voucher Information [54]

Source URL:https://www.cu.edu/psc/cu-marketplace-training?_ga=2.216048149.24253606.1585079339-272735915.1572905438

Links
[1] https://www.cu.edu/psc/cu-marketplace-training [2] https://www.cu.edu/psc/cu-marketplace-how-small-dollar-contract-request-form [3] mailto:changeorder@cu.edu [4] https://www.cu.edu/psc/commodity-listing [5] https://www.cu.edu/psc/how-buy-official-functions [6] https://www.cu.edu/psc/policies/access-training-requirements [7] http://my.cu.edu/ [8] https://pschelp.cu.edu/s/article/CU-Marketplace-Requesting-an-Honorarium-Recipient [9] https://pschelp.cu.edu/s/article/CU-Marketplace-Requesting-a-Purchase-Order-Supplier [10] https://www.irs.gov/pub/irs-pdf/fw9.pdf [11] https://www.cu.edu/psc/policies/adding-speedtypes-your-cu-marketplace-profile [12] https://www.cu.edu/psc/training/cumarketplace/adding-requestors-assignees-your-cu-marketplace-profile [13] https://www.cu.edu/psc/training/cumarketplace/adding-ship-locations-your-cu-marketplace-profile [14] https://www.cu.edu/psc/cu-marketplace-how-using-non-catalog-forms-shop [15] https://www.cu.edu/psc/cu-marketplace-how-creating-payment-vouchers-cu-marketplace [16] https://www.cu.edu/psc/cu-marketplace-how-creating-or-renewing-spos [17] https://www.cu.edu/psc/cu-marketplace-how-creating-or-renewing-subcontract-spos [18] https://www.cu.edu/psc/cu-marketplace-how-creating-subcontract-spos-fa-split [19] https://www.cu.edu/psc/cu-marketplace-how-creating-sole-source-procurements [20] https://www.cu.edu/psc/cu-marketplace-how-entering-after-fact-purchases [21] https://www.cu.edu/psc/training/quick-reference-guide-forms [22] https://www.cu.edu/psc/cu-marketplace-how-guided-buying [23] https://www.cu.edu/psc/viewing-contract-comments [24] https://www.cu.edu/psc/cu-marketplace-how-adding-details-shopping-carts-such-speedtypes-and-shipping [25] https://www.cu.edu/psc/cu-marketplace-how-splitting-accounting-distributions-speedtypesaccounts [26] https://www.cu.edu/psc/cu-marketplace-how-consolidating-shopping-carts [27] https://www.cu.edu/psc/cu-marketplace-how-copying-requisitions-new-shopping-carts [28] https://www.cu.edu/psc/cu-marketplace-how-modifying-shopping-carts [29] https://www.cu.edu/psc/cu-marketplace-how-assigningunassigning-shopping-carts-requestors [30] https://www.cu.edu/psc/cu-marketplace-how-assigning-substitute-requestors [31] https://www.cu.edu/psc/cu-marketplace-how-processing-assigned-shopping-carts [32] https://www.cu.edu/psc/cu-marketplace-how-withdrawing-requisitions-workflow [33] https://www.cu.edu/psc/cu-marketplace-how-solutions-pvs-cant-be-processed-cu-marketplace [34] https://www.cu.edu/psc/cu-marketplace-how-approving-requisitions [35] https://www.cu.edu/psc/cu-marketplace-how-initiating-email-approvals [36] https://www.cu.edu/psc/cu-marketplace-how-returning-requisitions-shared-approval-folders [37] https://www.cu.edu/psc/cu-marketplace-how-assigning-substitute-requisition-approvers [38] https://www.cu.edu/psc/cu-marketplace-how-approving-spo-vouchers [39] https://www.cu.edu/psc/cu-marketplace-how-placing-vouchers-invoices-hold [40] https://www.cu.edu/psc/cu-marketplace-how-entering-receiving-creating-quantity-receipts-pos [41] https://www.cu.edu/psc/cu-marketplace-how-documenting-returned-items-fixing-receipts-are-wrong [42] https://www.cu.edu/psc/cu-marketplace-how-resolving-match-exceptions-within-cu-marketplace [43] https://www.cu.edu/psc/cu-marketplace-how-replying-comments [44] https://www.cu.edu/psc/cu-marketplace-how-identifying-requestors-pos-within-cu-marketplace [45] https://pschelp.cu.edu/s/article/CU-Marketplace-Viewing-Invoice-Status [46] https://www.cu.edu/psc/cu-marketplace-how-po-status [47] https://www.cu.edu/psc/cu-marketplace-how-reviewing-incompatible-access-purchases [48] https://www.cu.edu/psc/cu-marketplace-how-requisition-status-and-approvals [49] https://www.cu.edu/psc/cu-marketplace-how-searching-pos-within-cu-marketplace [50] https://www.cu.edu/psc/cu-marketplace-how-searching-requisitions-within-cu-marketplace [51] https://www.cu.edu/psc/cu-marketplace-how-transactions-your-financial-statements [52] https://www.cu.edu/psc/cu-marketplace-how-using-advanced-document-search [53] https://pschelp.cu.edu/s/article/CU-Marketplace-Viewing-Invoice-Images [54]

https://www.cu.edu/psc/cu-marketplace-how-reading-voucher-information