

**Using the Agreement Intake Form in myUF Market**

Use this guide for the Agreement Intake Form in myUF Market instead of emailing a contract or agreement to UF Procurement. This myUF Market form will route your agreement to procurement agents for their review and signature. Track the agreement and communicate with the agent via comments on the requisition. This form is only meant to be used when there is a no cost agreement, loan equipment, an event that will be paid on a PCard or an agreement on behalf of an organization, such as 4-H, where UF is the signatory. This form/requisition **does not** create a purchase order, does not require financial approval and **does not** encumber any funds. The department financial approver will get an email notifying him/her of the agreement being submitted for Procurement review. Please use a regular requisition when the event is immediate, funds need to be encumbered, and one of the above conditions does not apply.

Access myUF Market by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password, and navigate by:

- a. Clicking **Nav bar > Main Menu > My Self Service > myUF Market** for UF\_N\_MKT\_Shopper role.
- b. Clicking **Nav bar > Main Menu > Financials > eProcurement > myUF Market** for UF\_N\_MKT\_Shopper\_Req role (to shop only) UF\_N\_MKT\_Requestor and UF\_N\_MKT\_Financial Approver.

To access the form, click on the Agreement Intake Form tile found at the top of the myUF Market Home Page under the Forms header. Please read the instructions. Complete the sections as shown in the steps and examples below.

**Step 1 – Complete the Form’s Commodity Code, Vendor and Department Contact Information**

- Commodity Codes: Only for use with the following Commodity Codes:
  - **Catering - 9010000**
  - **Hotels Lodging - 90110000**
  - **Passenger Transport - 78110000**
  - **Professional Business Services – 80000000**

**SAMPLE FORM**

<b>Order/Quote Information</b>	
<b>Commodity Code</b>	78110000 <input type="button" value="search..."/>
<b>Vendor on Document</b>	Holiday Coach Lines
<b>Department/Division</b>	UF - CPET
<b>Department Contact Name</b>	Janelle Jones
<b>Department Phone Number</b>	352 392-2310
<b>Department Contact Email</b>	janellej@cpet.ufl.edu
<b>Department Street Address</b>	Post Office Box 548 Ocoee Florida 34761
Vendor Name or dba if different	
<b>Vendor Contact Person</b>	Mike Essex
<b>Vendor Contact Office Telephone</b>	407 523-4300
<b>Vendor Contact Mobile Phone Number</b>	407 478-4578
<b>Vendor Contact Email</b>	holidayline@aol.com

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**Step 2 – Complete the Form’s Dates, Payment Amount and Payment Information**

Please allow Procurement Agents 10 working days to execute the agreement.

SAMPLE ONLY

<b>Requested Deadline **please allow 10 working days**</b>	09/30/2017 mm/dd/yyyy
Service Start Date	11/01/2017 mm/dd/yyyy
Service End Date	11/30/2017 mm/dd/yyyy
<b>Payment Amount</b>	670.00
Annual Payment Amount	0
<b>Party Responsible for Payment</b>	<input type="radio"/> University of Florida <input checked="" type="radio"/> Participants <input type="radio"/> Split - University and Participants <input type="radio"/> N/A - Other (please explain in #3 on this form.) <input type="radio"/> N/A - Revenue generating
<b>Does the payment Recur?</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes
<b>Do you plan to pay with PCard</b>	<input type="radio"/> No <input checked="" type="radio"/> Yes

**Step 3 – Answer Questions on the Agreement Form**

SAMPLE ONLY

<b>Should Procurement work directly with the vendor to resolve contract term issues?</b>	<input type="radio"/> No <input checked="" type="radio"/> Yes
<b>Please enter all UF and UF Health offices that have reviewed this agreement: (If none, enter None.)</b>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">None other.</div> <p>489 characters remaining <span style="float: right;">expand   clear</span></p>
<b>Are you aware of any conflict of interest by entering into an agreement with the Contractor?</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes
Conflict of Interest	<a href="http://www.purchasing.ufl.edu/departments/directives-procedures.asp#employee">http://www.purchasing.ufl.edu/departments/directives-procedures.asp#employee</a>
<b>If for software/hardware, has an IT Risk Assessment form been submitted?</b>	<input type="radio"/> No <input checked="" type="radio"/> This is not for software or hardware. <input type="radio"/> Yes
IT Risk Assessment website	<a href="https://security.ufl.edu/it-workers/risk-assessment/">https://security.ufl.edu/it-workers/risk-assessment/</a>

**Step 4 – Complete Additional Information Questions and add Attachments to the Form**

Additional Information Questions:

1. Briefly summarize interactions with proposed contractor and attach all relevant correspondence.

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2. From your perspective, what benefits are derived from entering into this agreement?
3. Please share any additional information such as other products considered?

Please attach the contract.

**Step 5 – Add the Form to the Cart by Clicking the GO button**

Once the form is complete, click the **Go** button on the top right to add to the cart.

**Agreement Intake Form for Departments** Available Actions: Add and go to Cart **Go** Close

Form History

**Form Instructions and Purpose**

**UF UNIVERSITY of FLORIDA**  
The Foundation for The Gator Nation

Agreement Intake Form for Departments

**Use this form if you have an agreement that requires review and signature of UF Procurement Services.**

**It is required you attach the agreement in the External Attachments section at the bottom right of this form.**

Click the Cart link on the top right to open the cart with the form inside.

**myuf market** Gator Requestor 672.00 USD Search (Alt+Q)

Shop > Shopping > Shopping Home > Home/Shop

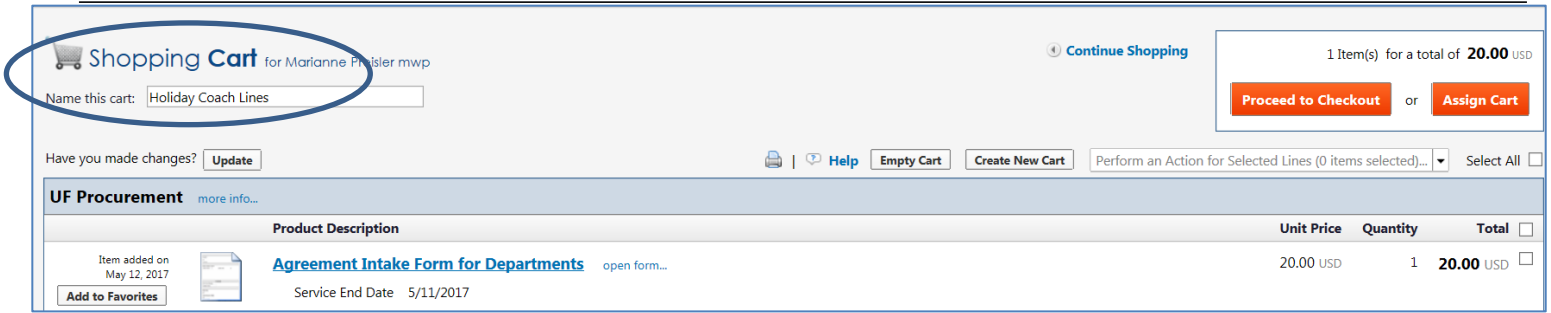
Shop Everything **Go**

Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts

**Step 6 – Name the Cart and click Proceed to Checkout or Assign Cart to a Requestor to Complete**

Enter the name of the vendor in the Agreement or Contract in the **Name This Cart** field to find later.

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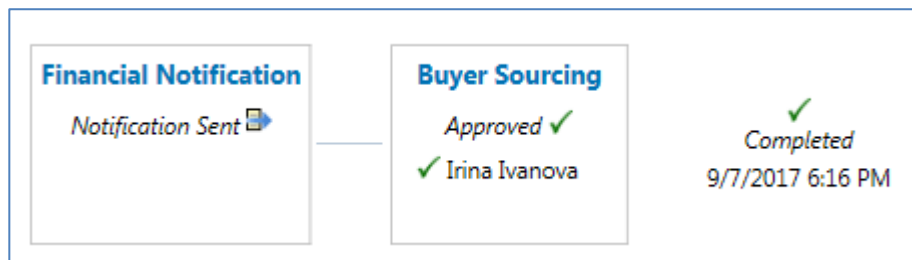
On the top right, click the **Proceed to Checkout** button to add ChartFields, Ship To and Bill To, or click the **Assign Cart** button to assign the cart to a requestor.

**For the Requestor Who has been Assigned a Cart with an Agreement Intake Form:**

No funds will be encumbered; the ChartFields are for routing purposes only in myUF Market. Use the guide, "[Completing a Requisition in myUF Market](#)" for additional help in entering ChartFields, Ship To, and Bill To, which are all required fields in a requisition. Once the cart/requisition has been submitted, the system will email the Financial Approver to notify them; then it will route to UF Procurement Agents for review. You may communicate with the agent reviewing the agreement via the Comment tab in the requisition, which will send an email to the agent. When the requisition is assigned or submitted, please make note of the requisition number to locate it later.

**Routing**

This will not route to the Financial Approver; however, the Financial Approver will be **notified via email** that an Agreement Intake Form has been submitted. **This will not create a purchase order.** The requisition will only route to UF Procurement Agents, who will work with the vendor and the requestor to execute the agreement.



**Tracking**

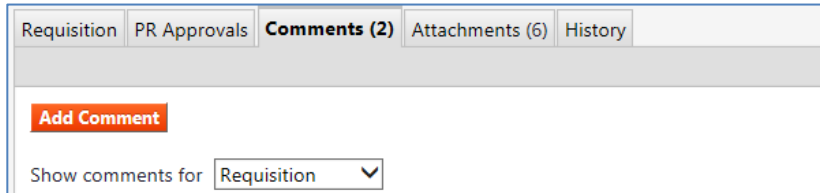
To track it, enter the requisition number in the **top right-hand search field** at the top. You may also click on the **Shop icon** on the left-hand menu > **My Carts and Orders** > **View My Orders (Last 90 Days)**.

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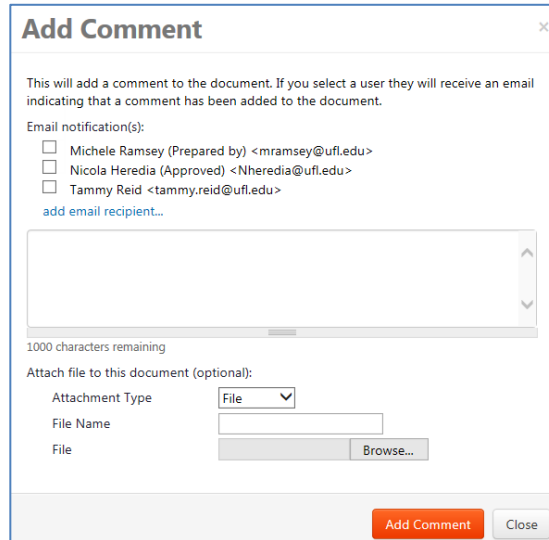
The Supplier is UF Procurement, and it will show the Requisition (Cart) Name with the name of the vendor on the form.

**Uploading Another Attachment**

If you need to attach another attachment after you have submitted the requisition, click on the Comments tab, then on Add Comment.



You may attach at the bottom of the comment and select the Procurement agent to notify them of the new attachment. If you do not see them on the list, click Add Email Recipient...



For additional help, please contact the UF Procurement Help Desk at [procurement@ufl.edu](mailto:procurement@ufl.edu) or 352 392-1335.