Use this guide for the Agreement Intake Form in myUF Marketplace instead of emailing a contract or agreement to UF Procurement. This myUF Marketplace 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 Marketplace 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 Marketplace** for UF_N_MKT_Shopper role.
b. Clicking **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace** 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 Marketplace 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 - 90100000
  - Hotels Lodging - 90110000
  - Passenger Transport - 78110000
  - Professional Business Services – 80000000

SAMPLE FORM
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**

| **Requested Deadline** **please allow 10 working days** | 09/30/2017 |
| **Service Start Date** | 11/01/2017 |
| **Service End Date** | 11/30/2017 |
| **Payment Amount** | $700.00 |
| **Annual Payment Amount** | 0 |
| **Party Responsible for Payment** | University of Florida, Participants, Split - University and Participants, N/A - Other (please explain in #3 on this form), N/A - Revenue generating |
| **Does the payment Recur?** | No, Yes |
| **Do you plan to pay with PCard** | No, Yes |

Step 3 – Answer Questions on the Agreement Form

**SAMPLE ONLY**

**Should Procurement work directly with the vendor to resolve contract term issues?**

- No
- Yes

Please enter all UF and UF Health offices that have reviewed this agreement: (If none, enter None.)

489 characters remaining

**Are you aware of any conflict of interest by entering into an agreement with the Contractor?**

- No
- Yes

Conflict of Interest

http://www.purchasing.uf.edu/departments/directives-procedures.asp#employee

**If for software/hardware, has an IT Risk Assessment form been submitted?**

- No
- This is not for software or hardware.
- Yes

IT Risk Assessment website

https://security.uf.edu/it-workers/risk-assessment/
**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.
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.
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.

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 Marketplace. Use the guide, “[Completing a Requisition in myUF Marketplace](#)” 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)**.

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 or 352 392-1335.