A PCS Intake Sheet is required for all Purchasing & Contracting Services (PCS) document review submissions, except Purchase Orders.

For contracts, please submit the PCS Intake Sheet together with the Contract and all related materials to contract@uoregon.edu.

For competitive procurement requests, please submit the PCS Intake Sheet with all related materials to competitionsupport@uoregon.edu.

**Department Information:**

**Department Name:** Insert the third and fifth level department names (e.g. College of Arts and Sciences/Chemistry) in the two boxes to the left. Insert the third and fifth level department organization numbers (e.g. 222000/223250) in the two boxes to the right. The UO Organization Chart showing 3rd and 5th level names and organization numbers can be found at http://pcs.uoregon.edu/content/organizational-chart-campus.

**Name of Person Authorizing Commitment of Funds:** Insert the name of the person in the department who has expressly authorized the expenditure of funds in connection with this matter. That person must have a valid, up-to-date UO Department Approval Authorization form on file showing their designation to commit department funds on the applicable index. If there are no funds to be spent or received in connection with this matter, insert the name of the person in the department who has expressly authorized the agreement.

**Department Contact Name:** Insert the name of the person within your department who will be the primary contact with Purchasing and Contracting Services (“PCS”) during the course of PCS’ review of the matter. This person will receive a receipt email acknowledging that PCS has received the agreement and placed it in our review queue. This person will also be the point of contact for any questions PCS may have while reviewing the contract, and will receive the approved contract to forward to the contractor.

**Department Contact E-mail, Phone & Address:** Insert the contact information for the person named as Department Contact.

**Contractor Information:**

**Competitive Procurement Requests:** For procurement requests, PCS understands the Contractor is unknown at the time of submission. Therefore, insert “TBD” in the Contractor field and skip the rest of this section.

**Contract Requests:**

**Contractor:** For contract requests, insert the name of the entity or individual with whom we will be contracting. Please be sure to use the full legal name of the entity or individual. This is either the full name of the individual if the contractor is a sole proprietorship or the name published on the website of the Secretary of State in the state in which the company is incorporated or organized. **Do not use abbreviations.** If the contractor would like to provide a “doing business as” (dba) name, please include the dba name following the full legal name (e.g. “Oregon Coachways, Inc. dba OC&W Coachways”). Please note that the full legal name is still required even if a dba name is present.
If Contractor is a new vendor (not previously set up in Banner), follow the instructions set forth at [http://ba.uoregon.edu/staff/vendor-setup](http://ba.uoregon.edu/staff/vendor-setup) for the new vendor set-up procedures and to obtain a copy of the UO Substitute W-9 instructions. **DO NOT SUBMIT UO SUBSTITUTE W-9 TO PCS.**

Additionally, if Contractor is a non-resident alien individual or entity, regardless of whether Contractor is a new vendor, follow the instructions set forth at [http://ba.uoregon.edu/staff/payment-process-for-international-visitors](http://ba.uoregon.edu/staff/payment-process-for-international-visitors). Complete all required documents and submit the original documents directly to Accounts Payable in Business Affairs Office. **DO NOT SEND COPIES OR ORIGINALS OF THE W-8, FORM 8233, OR ANY OTHER REQUIRED NON-RESIDENT ALIEN DOCUMENTS TO PCS.** If Contractor is a resident alien, Contractor does not need to submit documentation of Contractor’s status. If you have any questions regarding vendor set-up, resident alien, or non-resident alien requirements, please contact Accounts Payable at 346-3143.

**Type:** Specify what type of entity/individual the contractor is. Check each box that applies.

**Contractor Contact Name:** Insert the name of the contractor contact.

**Contractor E-mail, Phone & Address:** Insert the contact information for the person named as Contractor Contact. Please use the contractor’s business address.

**General Information:**

**Type of Contract:** Insert the type of contract to be reviewed. Please see the Key to Purchase Order and Contract Log or the Key to Competitive Procurement Log for a listing of abbreviations of common contract types, located on our website at [http://pcs.uoregon.edu/content/keys-tracking-information-and-uo-organization-report-and-staffing-assignments](http://pcs.uoregon.edu/content/keys-tracking-information-and-uo-organization-report-and-staffing-assignments). Please note that you can also locate the current departmental staffing assignments at PCS at this same location on our website.

For competitive procurement requests, insert the type of competitive procurement being used.

**$\$ Amount of Contract:** For contract requests, insert the total amount of funds expected to change hands under this agreement (regardless of whether we are receiving or paying). If there will be renewal periods, please use the entire life of the agreement including all renewals. If the total amount is unknown or yet to be determined, please estimate a maximum value to be paid under this agreement and use the “Department Comments/Additional Information” section below to provide more details if necessary.

For competitive procurement requests, we understand the exact dollar amount is unknown. Therefore, enter the maximum or “not to exceed” dollar amount for the procurement budget.

**Funding Sources:**

**Index:** Insert the index(es) which will be used to pay for this agreement or which will receive any income under this agreement. Please use the “Department Comments/Additional Information” section below if this agreement will involve more than two indexes.

**No $ Exchange:** Please check this box if no funds will be paid or received in connection with this matter. If this box is checked, it is not necessary to provide an index.

**Income:** Please check this box if money will be received by UO in connection with this matter.
PCS Intake Sheet Instructions

**Term (Dates):** Insert the start and end dates of this agreement. If this agreement is for one day only, please just list that day. Please note if there are any renewals available under this agreement.

**Grant Term (if Applicable):** If utilizing grant funds for this agreement, please insert not only the agreement dates, but also the dates of the grant award.

**Amendments:**

**Amendment Number:** If this is an amendment to an existing, previously executed contract, please note which amendment number is being requested. Please include a copy of the previously executed contract and any subsequent amendments with your submission.

**Cumulative Dollar Value:** If this is an amendment to an existing, previously executed contract, please note the total dollar value of the original agreement and all subsequent amendments, including the amendment being submitted.

**Processing Information:**

**Date Received by PCS:** Please leave this field blank, PCS will complete with date received.

**Standard Processing Due Date:** Please leave this field blank, PCS will complete with the standard processing due date. For form contracts (PSC, FUA, PLA, Hotel, Transportation) the standard processing time is 1 week. For custom contracts (not a PCS form) the standard processing time is 3 weeks. For informal competitive procurements, the standard processing time is 3 weeks.

**Department Comments:**

Include any additional information required and/or any other information you believe is relevant to the contract.

If utilizing grant funds and special terms and conditions are required for this agreement, please note the existence of those additional terms and conditions in this box and include a copy of the terms and conditions with the submittal of this Intake Sheet.

If you need your contract reviewed before the standard processing time, please fill in the date you need your contract completed. Please provide a detailed explanation of the need for expedited processing. If you do not include a request date or an explanation, PCS will assume our standard processing time is acceptable.

**Department Certification:**

Please read these two sections carefully and check each box. Intake forms that do not have both certifications checked will not be accepted. If you are unable to certify either item, please contact PCS to discuss at 6-2419.

If you have any additional questions about the PCS Intake Sheet, please contact PCS at 6-2419.