**Specialty Forms User Guide Table of Contents**

**Specialty Forms Reference Materials**

- Specialty Forms Submission Checklist ................................................................. 1-1
- Specialty Forms Policy and Procedure Summary .................................................. 1-2
- Creating an Invoice in PantherExpress ............................................................... 1-3

**Using the Dues, Professional Memberships, Registration and Subscriptions Forms** ........................................ 2-1

- Section Objectives .................................................................................................. 2-2
- Common Usage ....................................................................................................... 2-3
- Tips for Completing the Form .............................................................................. 2-4
- Check Pickup ........................................................................................................... 2-4
- Completing the Form ............................................................................................. 2-5

**Establishing a Conference and Event Agreement**

- Section Objectives .................................................................................................. 3-1
- Common Usage ....................................................................................................... 3-2
- Tips for Completing the Form .............................................................................. 3-3
- Required Attachments and Supporting Documentation ........................................ 3-4
- Policies Associated with the Conference and Event Form .................................... 3-5
- Completing the Form ............................................................................................. 3-6
- Requesting a Payment against a Conference and Event Agreement .................. 3-9

**Establishing a Guest Speaker Agreement**

- Section Objectives .................................................................................................. 4-1
- Tips for Completing the Form .............................................................................. 4-2
- Non-Standard Terms ............................................................................................. 4-3
- Required Attachments and Supporting Documentation ........................................ 4-4
- Completing the Form ............................................................................................. 4-5
- Requesting a Payment against a Guest Speaker Agreement ................................ 4-8

**Using the Other Payment Request Form**

- Section Objectives .................................................................................................. 5-1
- Common Usage ....................................................................................................... 5-2
- Tips for Completing the Form .............................................................................. 5-3
- Orders Greater than Five-Thousand Dollars ....................................................... 5-4
- Check Pickup ........................................................................................................... 5-5
- Conflict of Interest ................................................................................................. 5-5
- Policies Associated with the Other Payment Request Form ................................ 5-6
- Completing the Form ............................................................................................. 5-7
<table>
<thead>
<tr>
<th>Subject</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishing a Professional Service Agreement (PSA)</td>
<td>6-1</td>
</tr>
<tr>
<td>Section Objectives</td>
<td>6-2</td>
</tr>
<tr>
<td>Common Usage</td>
<td>6-3</td>
</tr>
<tr>
<td>Tips for Completing the Form</td>
<td>6-3</td>
</tr>
<tr>
<td>Required Attachments and Supporting Documentation</td>
<td>6-5</td>
</tr>
<tr>
<td>Policies Associated with the PSA Form</td>
<td>6-5</td>
</tr>
<tr>
<td>Helpful Hints</td>
<td>6-5</td>
</tr>
<tr>
<td>Completing the Form</td>
<td>6-6</td>
</tr>
<tr>
<td>Requesting a Payment against a Professional Service Agreement</td>
<td>6-9</td>
</tr>
<tr>
<td>Establishing a PSA using a Supplier Provided Agreement</td>
<td>7-1</td>
</tr>
<tr>
<td>Section Objectives</td>
<td>7-2</td>
</tr>
<tr>
<td>Common Usage</td>
<td>7-3</td>
</tr>
<tr>
<td>Tips for Completing the Form</td>
<td>7-3</td>
</tr>
<tr>
<td>Required Attachments and Supporting Documentation</td>
<td>7-4</td>
</tr>
<tr>
<td>Policies Associated with the Supplier Provided Agreement</td>
<td>7-5</td>
</tr>
<tr>
<td>Helpful Hints</td>
<td>7-5</td>
</tr>
<tr>
<td>Completing the Form</td>
<td>7-6</td>
</tr>
<tr>
<td>Requesting a Payment on a Supplier Provided Agreement</td>
<td>7-10</td>
</tr>
</tbody>
</table>
Specialty Forms Reference Materials for the PantherExpress System

Chapter 1
<table>
<thead>
<tr>
<th>Form</th>
<th>Conference/Event</th>
<th>Guest Speaker</th>
<th>Professional Services Agreement (PSA)</th>
<th>Research Sub-Contracts</th>
<th>Supplier Provided Agreement</th>
<th>Due Professional Membership Dues, Conference Registrations, Journal Subscriptions</th>
<th>Other Payment Request (Disbursements)</th>
<th>Refunds</th>
</tr>
</thead>
<tbody>
<tr>
<td>When to Use</td>
<td>Conferences, Graduation, Alumni Events, Training Events, Dinner Receptions</td>
<td>Individuals invited to the University to be a Speaker</td>
<td>Most services regardless of the value, for US residents only (including resident alien)</td>
<td>Contracts for research collaboration issued through the Office of Research</td>
<td>Services when a supplier will not accept a University Professional Services Agreement</td>
<td>Professional Membership Dues, Conference Registrations, Journal Subscriptions</td>
<td>Participant Payments, Payments to vendors who do not accept a purchase order</td>
<td>Refunds for payments made to the University</td>
</tr>
<tr>
<td>Form is distributed as a purchase order to the supplier</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Required Attachments (plus additional checked items below)</td>
<td>Service Provider’s Hotel/Event Agreement</td>
<td>Guest Speaker Agreement</td>
<td>Insurance Certificate, Service Provider’s Quote or Proposal. See PSA checklist on PantherExpress Website.</td>
<td>Fully executed contract signed by the Office of Research and other contracting entity.</td>
<td>Insurance Certificate, Service Provider’s Quote or Proposal</td>
<td>Invoice</td>
<td>Invoice</td>
<td>Back-up Information/documents</td>
</tr>
<tr>
<td>Items required to establish a new supplier</td>
<td>W-8 or W-9</td>
<td>W-8 or W-9</td>
<td>Supplier Verification Form and W-8 or W-9</td>
<td>W-8 or W-9</td>
<td>Supplier Verification Form and W-8 or W-9</td>
<td>W-8 or W-9</td>
<td>W-8 or W-9</td>
<td>None</td>
</tr>
<tr>
<td>Directed or Sole Source Justification form or Competitive Bidding documentation (if over $5,000)</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Requires end-user to attach an invoice or similar document to initiate payment</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

1. Foreign National Payments and Wire Transfers will not go through the PantherExpress System.

2. The information on this spreadsheet is a general guideline outlining the most frequently required information. Your transaction may be unique, and Payment Processing may require additional information to process your transaction.

09/02/14
**PantherExpress System Expansion Project**  
**Specialty Forms Policy and Procedure Summary**

<table>
<thead>
<tr>
<th>Transaction type</th>
<th>Policy or Procedure?</th>
<th>Description</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSA, RSA, Hotel events, Software, Speakers</td>
<td>Procedure</td>
<td>PSAs and RSAs must be established in the PantherExpress System prior to payment. A reference number (purchase order number) will be generated by the system. The PantherExpress System purchase order will not be issued to the service provider, but the reference number may be provided to the service provider for inclusion on the invoice. The University department must, however, write the PO number on the invoice that is submitting to Payment Processing.</td>
<td>Improves controls. Ensures that contracts, with terms and conditions that protect the University, exist for all services rendered. Ensures that all contracts for services are properly approved according to existing University policies. Enables tracking of total payments on a contract against approved contract amount to prevent overpayment.</td>
</tr>
<tr>
<td>PSAs, RSAs, Speakers</td>
<td>Policy 05-07-01: add exclusion</td>
<td>All expenses associated with contracted services should be estimated and included in the contract terms and conditions. Expenses will be paid through an invoice, instead of through a Travel and Business Expense Report.</td>
<td>Reduces the appearance that independent contractors are employees.</td>
</tr>
<tr>
<td>PSAs, RSAs, Hotel events, Speakers</td>
<td>Procedure</td>
<td>Required electronic departmental approvals through the PantherExpress System in addition to University and supplier signatures on written agreements.</td>
<td>Improves internal controls and reduces risk of unauthorized approvals.</td>
</tr>
<tr>
<td>Hotel events, Software, Speakers</td>
<td>Procedure</td>
<td>Special-purpose forms will be used to capture information about requests for hotel events and software purchases.</td>
<td>Relevant information will be collected in order to address special contractual terms associated with these types of purchases.</td>
</tr>
<tr>
<td>New Suppliers and Addition of first “purchasing site” to Supplier Record</td>
<td>Procedure</td>
<td>A full Supplier Verification Form (and IRS W-9 or W-8 series form, as appropriate) is required for a brand new supplier and for the addition of a first ‘purchasing site’ to any existing vendor not already in PantherExpress. A W9 is required when a new supplier is created or when any changes to an existing supplier exists like an address or name change.</td>
<td>Reduces the risk of incorrect 1099 and vendor selection and provides correct demographic data on all suppliers.</td>
</tr>
<tr>
<td>All</td>
<td>Procedure</td>
<td>Regardless of the dollar value, a purchase order number</td>
<td>Improved compliance with policy 05-02-05</td>
</tr>
</tbody>
</table>

Financial Operations  
Revised January 8, 2014
## PantherExpress System Expansion Project
### Specialty Forms Policy and Procedure Summary

<table>
<thead>
<tr>
<th>Category</th>
<th>Policy</th>
<th>Procedure</th>
<th>Related Policies/Procedures</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blankets</td>
<td>Policy 05-02-05</td>
<td>Blanket orders may only be issued for a maximum of one year.</td>
<td>Ensures that new orders are established for substantially different goods/services, and that purchases are competitively bid as required by existing University policies.</td>
<td></td>
</tr>
<tr>
<td>Blankets</td>
<td>Procedure</td>
<td>Blankets issued at the departmental level may only be for up to $5,000 per year. If over $5,000 per year, they should be submitted as a requisition to Purchasing Services.</td>
<td>Follows the spirit of University Policy 05-02-05 by not dividing purchasing commitments into smaller transactions in order to circumvent purchasing authority.</td>
<td></td>
</tr>
<tr>
<td>OPRs</td>
<td>Policy 05-06-03</td>
<td>Narrower utilization. Not for PSA, RSA, Software, Hotel payments. May be used for payments that are not associated with the purchase of goods or services such as legal settlements, royalties, etc.</td>
<td>Improves controls. Ensures that contracts, with terms and conditions that protect the University, exist for all goods purchased and services rendered. Ensures that all contracts for services are properly approved according to existing University policies. Enables tracking of total payments on a contract against approved contract amount to prevent overpayment.</td>
<td></td>
</tr>
<tr>
<td>OPRs</td>
<td>Procedure</td>
<td>Disbursement Requests have been renamed to reflect their narrower utility.</td>
<td>Clarity.</td>
<td></td>
</tr>
<tr>
<td>OPRs</td>
<td>Procedures</td>
<td>48-hour “rushes” will be called “pick-ups”. Checks will be completed within 48 hours and held up to four (4) business days for pick-up.</td>
<td>Clarity. True rushes (fewer than 48 hours) will only be available.</td>
<td></td>
</tr>
<tr>
<td>Contracted suppliers’ goods invoices</td>
<td>Procedure</td>
<td>Pay-on-PO is being eliminated.</td>
<td>Reduces the number NOIDs</td>
<td></td>
</tr>
<tr>
<td>PSA, RSA, Hotel events, Software</td>
<td>Procedure</td>
<td>An invoice discrepancy will be generated if the total invoices on a PSA, RSA, hotel agreement, software, or speaker agreement exceed the amount of the approved</td>
<td>Improves controls. Reduces the risk of unauthorized payments.</td>
<td></td>
</tr>
</tbody>
</table>

Financial Operations  
Revised January 8, 2014
Speakers agreement. The buyer must change the associated PO in the system, and route for approval as required.

Legend
PSA = Professional services agreement
RSA = Research subcontract agreement
OPR = Other payment request (previously known as a disbursement request)
Creating an Invoice in PantherExpress

Invoices should ONLY be created for the following forms: Conference and Hotel Agreement, Guest Speaker, Professional Service Agreement (PSA), Research Subcontracts, and Supplier Provided Agreements.

1. **Find the PO** for which you wish to create an invoice. Go to the Orders and Documents menu and click on Search Documents.

2. **Find the PO** for which you wish to create the invoice by entering the order #, or searching by a date range. Click Go.

3. **Click on the PO #** to open the document.

4. From the **Available Actions** dropdown menu, select Create Invoice, and click Go.

5. In the **Simple Manual Entry** screen enter the following:
   a. Invoice Date (if available). If an invoice date is not on the invoice, use the date that you are creating the invoice.
   b. Supplier Invoice Number. If a supplier invoice number is not available, use the date the contract was signed or the date the event occurred.
   c. Remit To Address. If the address where the payment should be sent is not the correct one, use the dropdown menu to select the correct address. If the correct Remit-To address is not in the dropdown menu, contact Payment Processing with a copy of the invoice to have the address added.
   d. **Line Items.** Review the PO line item information, and attach a copy of the invoice.
      - If a line item is present that is not to be paid on the invoice, delete the line.
      - If the unit price is incorrect, change it to the amount that is to be paid for that invoice and click Save.
      - **Attach a copy of the Invoice.** Click on the Comments Tab. Click “Add Comment”. Enter the comment, “See attached invoice”. Attach the PDF file you created from the supplier paper invoice by clicking on Browse, selecting the file and clicking Open. Click Add Comment. To see your attached copy of the paper invoice click on the Attachments tab.

6. **If you need to change the account number to which invoices will be charged**, click on the Buyer Invoice tab, scroll till you can see the Charge Account, and click Edit. Edit the Account Code segments and click Save.

7. **When all of the above steps have been completed**, scroll to the top of the form and click Complete.

8. Once the invoice has been completed, this will go to Payment Processing for review and approval of the payment.

**Note:** The invoice total cannot be greater than the Specialty Form total. **If you need to modify the Specialty Form dollar amount,** do the following:

   a. Find the PO, using Document Search
   b. Click on the PO #
   c. Click on the Form link at the Line Item level to open the Specialty Form
   d. Edit the Service Provider’s Fee amount
   e. Go to Available Actions at the top of the screen, select Save, and Go. Then close the form.
   f. Under General Information, there will be a message that the PO contains edits
   g. Go to Available Actions at the top of the screen, select Finalize Revision, and Go, to submit the document for reapproval.

**To Get Help** contact PantherExpress Customer Service at 412-624-3578.

Last updated 6/25/2014
Using the Dues, Professional Memberships, Registrations and Subscriptions Form in the PantherExpress System

Chapter 2
Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Dues, Professional Memberships, Registrations and Subscriptions form.
- Understand the policies of usage.
- Items to avoid.
- Request that an invoice be paid using the form.
Using Dues, Professional Memberships, Registrations and Subscriptions Form

- The Preparer and Approver are responsible for verifying that the purchase was necessary, within budget, and made in compliance with all applicable University policies and procedures.

- The Dues, Professional Memberships, Registrations and Subscriptions Form may not be used to pay for goods or services, which are required to be on a purchase order.

- A University Procurement Card (P-Card) is the preferred method of payment when possible for these types of transactions.

Common Usage:

- Professional Memberships
- Registrations
- Subscription
- Dues

When completing the form:

- Enter the supplier information. (If the supplier is not in the system follow the New Supplier process to have the supplier added to the supplier database).

- Include the purpose of use (purpose of your request from the drop down box).

- Justification of business purpose for the request (please add a brief, detailed explanation) Please be aware this field has a 1000 character limit.

- Include all check handling information including what information needs to be printed on the check.

- If the check is to be picked up – provide contact information so Payment Processing knows whom to notify when the check is ready.

- Include all required internal and external attachments.

- Enter all of the information listed on the form for the invoice(s) that are being paid.
Using Dues, Professional Memberships, Registrations and Subscriptions Form

- Attach a copy of all invoices that are being paid.

- Some Dues, Professional Memberships, Registrations and Subscription forms may require additional attachments and documentation. Payment Processing will notify you if additional information is required.

Check Pickup:

- If you choose this option on the form, the check will not be mailed to the party indicated. Payment Processing will notify the department when the check is ready, and an authorized representative will be required to pick up the check at the Payment Processing office.

- If the requestor is unable to come for the check, a memo is required from the requestor with the name of check and person picking up the check. A valid University ID is required for anyone picking up a check.

- The checks cannot be picked up by the supplier.

- Otherwise, all checks will be mailed.

NOTE: This form is not distributed to the supplier.
Using Dues, Professional Memberships, Registrations and Subscriptions Form

Accessing the form in the PantherExpress System:
To use the Dues, Professional Memberships, Registrations and Subscriptions Form in the PantherExpress System, you must have the proper permissions to view and use the Specialty Forms.

To access the Dues, Professional Memberships, Registrations and Subscriptions Form:
1. Go to the Home/Shop page
2. On the Home/Shop page scroll up to Go To: , and click on the FORMS link
3. This will take you to the Forms page
4. Click on Specialty Forms listed on the left hand side of the screen under the Shared folder.
5. You will find the Dues, Professional Memberships, Registrations and Subscriptions Form at the top of the Specialty Forms.
6. Click on the form

Completing the Dues, Professional Memberships, Registrations and Subscriptions Form:
The form is broken into three sections:
- The section at the top of the form contains information on the use of the form. Please review this area to ensure you are using the correct form.
- The section on the right side of the form contains all of the various fields that may need to be completed while filling out the form.
- The section on the left side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.
Using Dues, Professional Memberships, Registrations and Subscriptions Form
Submitting the Dues, Professional Memberships, Registrations and Subscriptions Form in the PantherExpress System

The information on the left side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing this form.

NOTE: All fields on the right hand side of the form that appear to be BOLDED are required.

If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.
Submitting the Dues, Professional Memberships, Registrations and Subscriptions Form in the PantherExpress System

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.

Please ensure you follow the instructions carefully. The form has been designed to obtain all of the required information and documentation from you at the time the form is completed. This will eliminate the need for someone in Payment Processing to contact you, and it will speed up the processing of your transaction.

Please be sure to add all of the required invoice information in Part D of the form. This information is critical to ensuring your payment will not get delayed.

Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have: Add to Cart and Return listed.
Submitting the Dues, Professional Memberships, Registrations and Subscriptions Form in the PantherExpress System

3. Click on the Go button. This will add the form to your cart.

4. Then click Close.

5. To complete your transaction – click your shopping cart (located at the top right hand of your screen)

6. Complete the transaction.

NOTE: Once all of the departmental approval steps have occurred the form will generate a purchase order, and an invoice. The invoice will be automatically sent to Payment Processing for review, approval and final payment. If there are any problems or concerns regarding the invoice Payment Processing will contact you.

If you have any questions on completing the form, please call PantherExpress Customer Service at 412-624-3578.
Establishing a Conference and Event Agreement

Chapter 3
The Conference and Event Form in the PantherExpress System

Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Conference and Event form.
- Understand the policies of usage.
- Items to avoid.
- Request that an agreement be executed using the form.
The Conference and Event Form in the PantherExpress System

The Conference and Event form is used to request agreements for conferences and events. This form is used for booking conference space for an event.

Common Usage:

- Seminars
- Graduations
- Alumni Events
- Training Events
- Dinner Receptions

When completing the form:

- Include all Point of Contact information
- Include Date of the Event and End Date (same date in both sections is permissible for a one-day event)
- Include all check handling information
- Include all required attachments:
  - Directed or Sole Source Justification form (if over $5,000)
  - Service Provider’s hotel or event agreement
  - Email copies of approvals from Department and/or Office of General Counsel
  - Check to see if the supplier is already in the supplier database before starting the Conference and Event Form. If not, please follow the new supplier process in the PantherExpress System to have the supplier added to the database.

The PO generated by this form is not distributed to the supplier.
Special Instructions for the Conference and Event Form in the PantherExpress System

Required Attachments and Supporting Documentation:

- Purchasing Services reviews, approves, and submits the agreement to the supplier.

- Do not submit an incomplete Directed or Sole Source Justification form. The requester must explain why other suppliers were excluded and proper legible signatures must be included: Dean, Department Chair, or Department Director as approvers must be included. Please indicate title. The requester must sign twice.

- If using a Directed or Sole Source Justification Form, the requester or approver must complete the Conflict of Interest Forms in HS-Connect before signing the Directed or Sole Source Justification Form.

  Note: Approver must be a Dean, Department Chairperson or Department Director. (Administrators cannot sign on behalf of the Dean, Department Chair, or Department Director.)

- Attach all supporting documentation directly to the form before submitting for approvals.

Other Instructions:

- All checks will be paid according to the terms and conditions of the agreement.

- A list of attendees (full names and affiliations) may be required depending on the event.
Special Instructions for the Conference and Event Form in the PantherExpress System

Policies associated with the Conference and Event Form:

All University of Pittsburgh procurement activities are subject to the University’s policies and procedures:

Policy 05-02-02 Conflict of Interest and Procurement Relationships
Policy 05-02-03 Code of Ethics
Policy 05-02-14 Authority for Management of Procurement
Policy 05-02-15 Required Use of Contracted Suppliers
Policy 05-02-16 Competitive Bidding

Please see the Conference and Event Guidelines page for more information:

http://cfo.pitt.edu/pexpress/events_conferences.php
Using the Conference and Event Form in the PantherExpress System

Accessing the form in the PantherExpress System:
To use the Conference and Event Form in the PantherExpress System, you must have the proper permissions to view and use the Specialty Forms.

To access the Conference and Event Form:
1. Go to the Home/Shop page
2. On the Home/Shop page scroll up to Go To: , and click on the FORMS link
3. This will take you to the Forms page
4. Click on Specialty Forms listed on the left hand side of the screen under the Shared folder.
5. You will find the Conference and Event Form at the top of the Specialty Forms.
6. Click on the form

Completing the Conference and Event Form:
The form is broken into three sections:

- The Section on the top of the form contains brief instructions on the use of the form, and several examples of applicable use of the form.

- The section on the right side of the form contains all of the various fields that may need to be completed while filling out the form.

- The section on the left side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.
Using the Conference and Event Form in the PantherExpress System

The information on the left side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Conference and Event Form.

NOTE: All fields on the right hand side of the form that appear to be BOLDED are required.

If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.
Using the Conference and Event Form in the PantherExpress System

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.

Please ensure you follow the instructions carefully. The form has been designed to obtain all of the required information and documentation from you at the time the form is completed. This will eliminate the need for someone in Purchasing Services to contact you, and it will speed up the processing of your transaction.

Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have: Add to Cart and Return listed.

3. Click on the Go button. This will add your Conference and Event Form to your cart.

4. Then click Close.

5. To complete your Conference and Event Transaction – click your shopping cart (located at the top right hand of your screen)

6. Complete the transaction.
Using the Conference and Event Form in the PantherExpress System

Requesting a Payment Against a Conference and Event Agreement:

- Payment will not occur unless an invoice is created in the PantherExpress system.
- Invoices cannot be entered against the agreement until the Supplier Provided Agreement form completes all departmental approvals, and a Purchase Order number is generated in the PantherExpress System.
- A new invoice must be created for each payment against the agreement.
- For detailed instructions on how to enter an invoice see Chapter 1 - Page 6 of the Specialty Forms User Guide.

If you have any questions on completing the form, please call PantherExpress Customer Service at 412-624-3578.
Establishing a Guest Speaker Agreement

Chapter 4
The Guest Speaker Form in the PantherExpress System

Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Guest Speaker Form
- Understand the policies of usage
- Understand items to avoid
Using the Guest Speaker Form in the PantherExpress System

The Guest Speaker Form is used to issue a contract and request payment for a guest speaker.

Payments to non-US persons must be submitted to Payment Processing on a paper Disbursement Request form with the required supporting documentation.

The request may only be used to initiate payment to a US person (including a resident alien) as defined by the I.R.S.

When completing the form:

- Before using the Guest Speaker Form, be sure to search to determine if the guest speaker is already in the supplier database. If the guest speaker is not in the supplier database, please use the new supplier process in the PantherExpress system to have the guest speaker added to the database.

- Include the guest speaker’s point of contact information for the agreement you are creating. Please note: P.O. box addresses are not acceptable for this type of agreement.

- All bolded fields in the point of contact section of the form are required.

- Be sure to complete all fields in Part C
  - **Request contract effective date:** Begin date must be the day the services commence.
  - **End date:** should extend to the time period that is necessary for the guest speaker to complete the services and any necessary time required by the requestor’s department to review, approve and accept the work and/or services performed.
  - **Total Contract Value including T&B expenses:** The Total Contract Value includes the guest speaker's fee and the total of the estimated Travel and Business Expense Amount.
  - **Guest Speaker’s Fee:** Provide the total (not to exceed) amount of the guest speaker's fee solely for the services to be rendered (not including travel and business expenses).
Special Instructions for the Guest Speaker Form in the PantherExpress System

Non-Standard Terms:
If the guest speaker form you are creating has non-standard terms associated with the transaction, you must complete Part D of the form.

• Use the dropdown box in Part D to indicate the non-standard speaker terms.

Required Attachments and Supporting Documentation:

• Guest Speaker Agreement: Choose the correct Guest Speaker Agreement based upon ownership of the presentation. Click here for the appropriate form.

• E-mail copies of necessary approvals for example from General Counsel or your department.

• NOTE: Failure to attach any of the above documents will cause your Guest Speaker form to be returned to you for completion.

Other Instructions:

• Checks will be paid according to the terms and conditions of the agreement.
Placing Orders using the Guest Speaker Form in the PantherExpress System

Accessing the form in the PantherExpress System:

To use the Guest Speaker form in the PantherExpress System, you will find it under Forms – Shared – Specialty Forms.

To access the Guest Speaker Form:
1. Go to the Home/Shop page
2. On the Home/Shop page, scroll up to Go To: and click on the Forms link
3. This will take you to the Forms page
4. Click on Specialty Forms, listed on the left-hand side of the screen under the Shared folder
5. You will find the Guest Speaker Form on the page
6. Click on the form

Completing the Guest Speaker Form:

The form is broken into three sections:

- The Section on the top of the form contains brief instructions on the use of the form, and several examples of applicable use of the form.

- The section on the right side of the form contains all of the various fields that may need to be completed while filling out the form.

- The section on the left side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.
**Using the Guest Speaker Form in the PantherExpress System**

The information on the left side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Guest Speaker Form.

All **BOLDED** fields on the right hand side of the form are required. If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.
Using the Guest Speaker Form in the PantherExpress System

Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have “Add to Cart and Return” listed.

3. Click on the Go button. This will add your Guest Speaker Form to your cart.

4. Then click Close.

5. To complete your Guest Speaker Transaction – click your shopping cart (located at the top right hand of your screen)

6. Add your Department Name in the Description field located in the General section of the Requisition Summary page:
7. Entering the Department Name in the Description Field will allow your Guest Speaker form to be processed more quickly and efficiently.

8. Complete the transaction.

**Requesting a Payment Against a Guest Speaker Agreement:**

- Payment will not occur unless an invoice is created in the PantherExpress system.
- Invoices cannot be entered against the agreement until the Supplier Provided Agreement form completes all departmental approvals, and a Purchase Order number is generated in the PantherExpress System.
- A new invoice must be created for each payment against the agreement.
- For detailed instructions on how to enter an invoice see Chapter 1 - Page 6 of the Specialty Forms User Guide.

*If you have any questions on completing the form, please call PantherExpress Customer Service at 412-624-3578.*
Placing Orders Using the Other Payment Request Form in the PantherExpress System

Chapter 5
The Other Payment Request Form in the PantherExpress System

Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Other Payment Request form
- Understand the policies of usage
- Items to avoid
- Request that an invoice be paid using the form
**Using the Other Payment Request Form in the PantherExpress System**

- This form is only to be used when the purchase does not belong in another category. (For example: awards, honorariums, stipend, etc.).

- This form requires second signature approval.

- A signed and dated I.R.S. Form W-9 must be included with the Internal Attachments for EVERY Other Payment Request Form submitted through the PantherExpress System.

- The Preparer and Approver are responsible for verifying that the purchase was necessary, within budget, and made in compliance with all applicable University policies and procedures.

- The Other Payment Request Form may not be used to pay for goods or services, which are required to be on a purchase order.

- The Other Payment Request Form may only be used when approved procurement options are not available.

- The Other Payment Request Form may only be used to initiate payment to a U.S. Person (including a resident alien) as defined by the I.R.S. W-9

- Any attempted payment that should be made via a different method will be returned to be completed on the correct form.

- Payments to Non-U.S. Persons MUST be submitted to Payment Processing on a paper Disbursement Request Form with required supporting documentation.

**Common Usage:**

- Honorariums
- Awards
- Prizes
- Food
Using the Other Payment Request Form in the PantherExpress System

When completing the form:

- Enter the supplier information. (If the supplier is not in the system follow the New Supplier process to have the supplier added to the supplier database).
- Indicate the Payee Type for the payment.
- Include the Purpose of the Other Payment Request.
- Justification of business purpose for the Other Payment Request.
- Include all check handling information including what information needs to be printed on the check.
- If the check is to be picked up – provide contact information so Payment Processing knows whom to notify when the check is ready.
- Include all required attachments.
- Enter all of the invoices that are being paid.
- Attach a copy of all invoices that are being paid.
- NOTE: Some Other Payment Requests may require additional attachments and documentation.

This form is not distributed to the supplier.
Special Instructions for the Other Payment Request Form in the PantherExpress System

When submitting orders greater than $5,000:

- Do not submit an incomplete Directed/Sole Source Justification form. Requester must explain why other suppliers were excluded and proper legible signatures must be included: Dean, Department Chair, or Director. Please indicate title. Requester must sign twice. Print or type names above signatures with title listed.

- If using a Directed or Sole Source Justification Form, the requester or approver must complete the Conflict of Interest Forms in HS-Connect before signing the Directed or Sole Source Justification Form.
  
  Note: Approver must be a Dean, Department Chairperson or Department Director. (Administrators cannot sign on behalf of the Dean, Department Chair, or Director)

- Attach all back-up documentation directly to the requisition before submitting for approvals.

Check Pickup:

- If you choose this option on the form, the check will not be mailed to the party indicated. Payment Processing will notify the department when the check is ready, and an authorized representative will be required to pick up the check at the Payment Processing office.

- If the requestor is unable to come for the check, a memo is required from the requestor with the name of check and person picking up the check. A valid University ID is required for anyone picking up a check.

- The checks cannot be picked up by the supplier.

- Otherwise, all checks will be mailed.

Conflict of Interest:

- If using a Directed or Sole Source Justification Form, the requester or approver must complete the Conflict of Interest forms in HS-Connect before signing the Directed or Sole Source Justification Form.
  
  Note: Approver must be a Dean, Department Chairperson, or Department Director.
Special Instructions for the Other Payment Request Form in the PantherExpress System

Policies associated with the Other Payment Request Form:

All University of Pittsburgh procurement activities are subject to the University’s policies and procedures:
  - Policy 05-02-02 Conflict of Interest and Procurement Relationships
  - Policy 05-02-03 Code of Ethics
  - Policy 05-02-14 Authority for Management of Procurement
  - Policy 05-02-15 Required Use of Contracted Suppliers
  - Policy 05-02-16 Competitive Bidding

In order to do business or be considered for doing business with the University, suppliers must comply with these policies which include the University’s Terms and Conditions. (See Policy 05-02-18 Supplier Code of Conduct and University of Pittsburgh Schools of Health Sciences Industry Relationship Policy.)
Accessing the form in the PantherExpress System:

To use the Other Payment Request Form in the PantherExpress System, you must have the proper permissions to view and use the Specialty Forms.

To access the Other Payment Request Form:

1. Go to the Home/Shop page
2. On the Home/Shop page scroll up to Go To: , and click on the FORMS link
3. This will take you to the Forms page
4. Click on Specialty Forms listed on the left hand side of the screen under the Shared folder.
5. You will find the Other Payment Request Form at the top of the Specialty Forms.
6. Click on the form

Completing the Other Payment Request Form:

The form is broken into three sections:

- The section at the top of the form contains information on the use of the form. Please review this area to ensure you are using the correct form.
- The section on the right side of the form contains all of the various fields that may need to be completed while filling out the form.
- The section on the left side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.
Submitting the Other Payment Request Form in the PantherExpress System

The information on the left side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Other Payment Request Form.

NOTE: All fields on the right hand side of the form that appear to be BOLDED are required.

If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.
Submitting the Other Payment Request Form in the PantherExpress System

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.

Please ensure you follow the instructions carefully. The form has been designed to obtain all of the required information and documentation from you at the time the form is completed. This will eliminate the need for someone in Payment Processing to contact you, and it will speed up the processing of your transaction.

Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have: Add to Cart and Return listed.

3. Click on the Go button. This will add your Conference and Event Form to your cart.

4. Then click Close.

5. To complete your Other Payment Request transaction – click your shopping cart (located at the top right hand of your screen)

6. Complete the transaction.
Submitting the Other Payment Request Form in the PantherExpress System

**NOTE:** Once all of the departmental approval steps have occurred the form will generate a purchase order, and an invoice. The invoice will be automatically sent to Payment Processing for review, approval and final payment. If there are any problems or concerns regarding the invoice Payment Processing will contact you.

If you have any questions on completing the form, please call PantherExpress Customer Service at 412-624-3578.
Establishing a Professional Service Agreement

Chapter 6
The PSA Form in the PantherExpress System

Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Professional Services Agreement Form
- Understand the policies of usage
- Understand items to avoid
Using the PSA Form in the PantherExpress System

The PSA Form is used to request agreements for most services.

This form should not be used for Hotel/Event agreements, software license agreements or Webhosting services. Please refer to the PantherExpress website for proper forms and procedures for Hotel/Event, SLAs and Webhosting Services.

Note: All University units are required to use University-wide contracted suppliers, when available, to purchase goods and services. A listing of these suppliers is provided at:

http://cfo.pitt.edu/pexpress/purchases/contractedSuppliers.php

Common Usage:

Accounting    Janitorial Services
Artistic Production Services  Logo Imprinting Services
Auditing        Marketing
Consulting      Photography
Grant Writing Services  Radio/TV/Magazine Advertising
Hazardous Waste Removal  Technical Writing & Website Design

When completing the form:

• Before using the PSA Form, be sure to search the supplier’s electronic and/or punch-out catalogs on the PantherExpress System.

• Not all Service Providers in the PantherExpress System are University-wide contracted suppliers – only those who have a punch-out or hosted catalog are University-wide contracted suppliers.

• Check to see if the Service Provider is in the supplier database before starting your PSA. If not, please follow the New Supplier process in the PantherExpress System to have the supplier added to the database.

• Do not use this PSA Form for items available when a P-Card is used for the order and payment.
**Special Instructions for the PSA Form in the PantherExpress System**

**Required Attachments and Supporting Documentation:**

- Completed Professional Services Agreement with Scope of Services.
- Choose the correct PSA based upon Federal funds and/or when Service Providers are interacting with minors.
- Certificate of Insurance with the University listed as an additional insured and the Certificate holder.
- Copy of the Service Provider quotation/proposal(s) that are valid for at least 30 days.
- E-mail copies of necessary approvals for example from either: CSSD, FIS, Facilities, EH&S, and/or General Counsel.
- 20 Factor Test results page if applicable.
- Competitive bidding information or approved Directed Sole Source Justification form for agreements over $5000.

**Other Instructions:**

- Purchasing Services reviews, approves, and submits the PSA to the Service Provider.
- Refer to PSA Checklist.
- Do not submit an *incomplete* [Directed or Sole Source Justification](#) form. Requester must explain why other suppliers were excluded. Proper legible signatures and titles of a Dean, Department Chair, or Department Director as the approver must be included. The requester must sign twice, as the approver must be included.
- If using a Directed or Sole Source Justification Form, the requester and approver must already have submitted the Conflict of Interest forms in HS-Connect.

**Note:** Administrators cannot sign on behalf of the Dean, Department Chair or Department Director.
Special Instructions for the PSA Form in the PantherExpress System

Policies associated with the PSA Form:

All University of Pittsburgh procurement activities are subject to the University’s policies and procedures:

Policy 05-02-02 Conflict of Interest and Procurement Relationships
Policy 05-02-03 Code of Ethics
Policy 05-02-14 Authority for Management of Procurement
Policy 05-02-15 Required Use of Contracted Suppliers
Policy 05-02-16 Competitive Bidding

Helpful Hints:

- Pay careful attention to the Instructions portion in the left-hand section of the PSA Form and to the PSA Checklist.

- Plan ahead with sufficient lead-time. Forward PSA requests with sufficient lead-time prior to the Service Provider beginning its services. PSAs are reviewed on a case-by-case basis. Each PSA may have unique concerns that need to be addressed by the University prior to obtaining approvals/signatures.

- University policy prohibits verbal orders, thus you must have an approved and signed PSA in place prior to the Service Provider commencing work. Any necessary legal/business term negotiations can become more problematic and time consuming if the Service Provider has performed its services already.

- The PSA may not be used to contract with a foreign individual for services to be completed outside the United States.
Placing Orders using the PSA Form in the PantherExpress System

Accessing the form in the PantherExpress System:

To use the PSA form in the PantherExpress System, you will find it under *Forms – Shared Forms – Pittsburgh Forms.*

To access the PSA form:

1. Go to the Home/Shop page
2. On the Home/Shop page, scroll up to Go To: and click on the *Forms* link
3. This will take you to the *Forms* page
4. Click on *Specialty Forms*, listed on the left-hand side of the screen under the Shared folder
5. You will find the *PSA Form* on the page
6. Click on the form

Completing the PSA Form:

The form is broken into three sections:

- The Section on the **top** of the form contains brief instructions on the use of the form, and several examples of applicable use of the form.
- The section on the **right** side of the form contains all of the various fields that may need to be completed while filling out the form.
- The section on the **left** side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.
Placing Orders using the PSA Form in the PantherExpress System

The information on the left side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the PSA Form.

All **BOLDED** fields on the right hand side of the form are required. If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.
Placing Orders using the PSA Form in the PantherExpress System

Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have “Add to Cart and Return” listed.

3. Click on the Go button. This will add your PSA Form to your cart.

4. Then click Close.

5. To complete your PSA Transaction – click your shopping cart (located at the top right hand of your screen)

6. Add your Department Name in the Description field located in the General section of the Requisition Summary page:
7. Entering the Department Name in the Description Field will allow your Professional Services Agreement form to be processed more quickly and efficiently.

8. Complete the transaction.

Requesting a Payment against a Professional Service Agreement:

- Payment will not occur unless an invoice is created in the PantherExpress system.
- Invoices cannot be entered against the agreement until the Supplier Provided Agreement form completes all departmental approvals, and a Purchase Order number is generated in the PantherExpress System.
- A new invoice must be created for each payment against the agreement.
- For detailed instructions on how to enter an invoice see Chapter 1 - Page 6 of the Specialty Forms User Guide.

*If you have any questions on completing the form, please call PantherExpress Customer Service at 412-624-3578.*
Using the Supplier Provided Agreement Form in the PantherExpress System

Section Objectives

At the end of this section, you should be able to:

- Understand the use of the Supplier Provided Agreement Form
- Understand the policies of usage
- Understand items to avoid
Using the Supplier Provided Agreement Form in the PantherExpress System

This form is used to request agreements for services when the supplier will not accept the University's standard contract (the PSA). Supplier Provided Agreements are non-standard University contracts and thus, regardless of dollar value, must be forwarded to Purchasing Services for review and signature.

Below is a sample list of, where it may be acceptable to use a Supplier Provided Agreement: Accounting, Artistic Production Services, Auditing, Consulting, Grant Writing Services, Hazardous Waste Removal, Janitorial Services, Logo Imprinting Services, Marketing, Photography, Radio/TV/Magazine Advertising, Technical Writing, Telecommunication Services, Video Production, Web-site design.

Note: The University greatly prefers to use its standard agreements rather than negotiate and execute supplier provided agreements.

Equipment Maintenance Agreements: Equipment maintenance agreements are to be addressed with University-wide contracted supplier, Specialty Underwriters.

Note: All University departments are required to use University-wide contracted suppliers, when available, to purchase goods and services. A listing of these suppliers is provided at:

http://cfo.pitt.edu/pexpress/purchases/contractedSuppliers.php

Tips for completing the form:

• Before using the Supplier Provided Agreement Form, be sure to search the supplier’s electronic and/or punch-out catalogs on the PantherExpress System.

• Not all Service Providers in the PantherExpress System are contracted suppliers – only those who have a punch-out or hosted catalog are contracted suppliers.

• Check to see if the Service Provider is in the supplier database before starting your Supplier Provided Agreement Form. If not, please follow the New Supplier process in the PantherExpress System to have the supplier added to the database.

• Do not use the Supplier Provided Agreement Form for items available through when a P-Card is used for the order and payment.
Special Instructions for the Supplier Provided Agreement Form in the PantherExpress System

Required Attachments and Supporting Documentation:

- Completed Supplier Provided Agreement.
- Certificate of Insurance with the University listed as an additional insured and the Certificate holder.
- Copy of the Service Provider quotation/proposal(s) that are valid for at least 30 days.
- E-mail copies of necessary approvals for example from either: CSSD, FIS, Facilities, EH&S, and/or General Counsel.
- 20 Factor Test results page, if applicable.
- Competitive bidding information or approved Directed or Sole Source Justification form for agreements over $5000.

Other Instructions:

- Purchasing Services reviews, approves, and submits the Supplier Provided Agreement to the Service Provider.
- Do not submit an incomplete Directed or Sole Source Justification form. Requester must explain why other suppliers were excluded. Proper legible signatures and titles of a Dean, Department Chair, or Department Director as the approver must be included; the requester must sign twice. An Approver must be included.
- If using a Directed or Sole Source Justification Form, the requester and approver must already have submitted the Conflict of Interest forms in HS-Connect.

Note: Administrators cannot sign on behalf of the Dean, Department Chair or Department Director.
Special Instructions for the Supplier Provided Agreement Form in the PantherExpress System

Policies associated with the Supplier Provided Agreements Form:

All University of Pittsburgh procurement activities are subject to the University’s policies and procedures:

- Policy 05-02-02 Conflict of Interest and Procurement Relationships
- Policy 05-02-03 Code of Ethics
- Policy 05-02-14 Authority for Management of Procurement
- Policy 05-02-15 Required Use of Contracted Suppliers
- Policy 05-02-16 Competitive Bidding

Helpful Hints:

- Pay careful attention to the Instructions portion in the left-hand section of the Supplier Provided Agreement Form.
- Plan ahead with sufficient lead-time. Supplier Provided Agreements are reviewed on a case-by-case basis. Each Supplier Provided Agreement may have unique concerns that need to be addressed by the University prior to obtaining approvals/signatures.
- University policy prohibits verbal orders, thus you must have an approved and signed Supplier Provided Agreement in place prior to the Service Provider commencing work. Any necessary legal/business term negotiations can become more problematic and time consuming if the Service Provider has performed its services already.
- The Supplier Provided Agreement may not be used to contract with a foreign individual for services to be completed outside the United States.
Placing Orders using the Supplier Provided Agreement Form in the PantherExpress System

Accessing the form in the PantherExpress System:

To use the Supplier Provided Agreement form in the PantherExpress System, you will find it under Forms – Shared Forms – Specialty Forms.

To access the Supplier Provided Agreement form:

1. Go to the Home/Shop page
2. On the Home/Shop page, scroll up to Go To: and click on the Forms link
3. This will take you to the Forms page
4. Click on Pittsburgh Forms, listed on the left-hand side of the screen under the Shared folder
5. You will find the Supplier Provided Agreement Form as the last form on the page
6. Click on the form

Completing the Supplier Provided Agreement Form:

The form is broken into three sections:

- The Section on the top of the form contains brief instructions on the use of the form, and several examples of applicable use of the form.
- The section on the right side of the form contains all of the various fields that may need to be completed while filling out the form.
- The section on the left side of the form provides detailed information on how to complete the related fields on the right side of the form. This section is meant to answer most questions you may have related to completing the form.
### Placing Orders using the Supplier Provided Agreement Form in the PantherExpress System

**Instructions:** This form is used to request agreements for services when the supplier will not accept the University's standard contract (the PSA).

**Below is a sample list of where it may be acceptable to use a supplier provided agreement:**
- Accounting, Artistic Production Services, Auditing, Consulting, Grant Writing Services, Hazardous Waste Removal, Janitorial Services, Logo/Imprinting Services, Marketing, Photography, Radio/TV/Magazine Advertising, Technical Writing, Telecommunication Services, Video Production, Website design.

**Equipment Maintenance Agreements:** Equipment maintenance agreements are to be addressed with the University contracted supplier, Specialty Underwriters.

**Note:** For research subcontracts please review Office of Research or Purchasing Services PSA determination checklist.

**Note:** The University greatly prefers to use its standard agreements rather than negotiate and execute supplier provided agreements.

- Do **NOT** use this form to initiate payment to a non-US person (Foreign Person, nonresident Alien, or foreign entity).
- Payments to non-US persons **MUST** be submitted to Payment Processing on a paper Disbursement Request form with the required supporting documentation.
- This request may only be used to initiate payment to a US person (excluding a resident alien) as defined by the IRS.

<table>
<thead>
<tr>
<th>Part A. Service Provider</th>
<th>Part A. Supplier Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>University policy requires the use of contracted suppliers. Before adding a supplier, you must first check the contracted supplier list. Low-value, one-time purchases that are not available from a University contracted supplier should be obtained by using a University P-card. If the supplier you wish to use is not available in PantherExpress, you will need to fill out all sections of the Supplier Verification Form (SVF) and obtain the required signatures (departmental and supplier) and W-9 or W-4, as appropriate (see instructions on the SVF). Attach the Supplier Verification Form and W-9 or W-4 (see the SVF for requirements pertaining to original documents) to this PantherExpress form through &quot;internal attachments.&quot; Then choose the supplier name &quot;New Supplier,&quot; and this form will be routed to the proper University departments for supplier creation and for it to be applied to this purchase.</td>
<td>Enter Supplier</td>
</tr>
</tbody>
</table>
Placing Orders using the Supplier Provided Agreement Form in the PantherExpress System

The information on the left side of the form also contains hyperlinks. These links will take you to additional information that may be vital to you accurately completing the Supplier Provided Agreement Form.

All BOLDED fields on the right hand side of the form are required. If one of the required fields is left blank, the system will not allow you to submit the form. You will be required to fill in the missing information before you can submit the form.

On the form, you will be asked to fill in all of the required fields, and attach all of the required documentation necessary to process your transaction.
Placing Orders using the Supplier Provided Agreement Form in the PantherExpress System

Final submission of the form:

1. Once you have filled out all of the required information, and attached required documentation, scroll up to the top of the form.

2. The Available Actions drop down box will have “Add to Cart and Return” listed.

3. Click on the Go button. This will add your Supplier Provided Agreement Form to your cart.

4. Then click Close.

5. To complete your Supplier Provided Agreement Transaction – click your shopping cart (located at the top right hand of your screen).

6. Add your Department Name in the Description field located in the General section of the Requisition Summary page:
Placing Orders using the Supplier Provided Agreement Form in the PantherExpress System

7. Entering the Department Name in the Description Field will allow your Supplier Provided Agreement form to be processed more quickly and efficiently.

8. Complete the transaction.

Requesting a Payment Against a Supplier Provided Agreement:

- Payment will not occur unless an invoice is created in the PantherExpress system.
- Invoices cannot be entered against the agreement until the Supplier Provided Agreement form completes all departmental approvals, and a Purchase Order number is generated in the PantherExpress System.
- A new invoice must be created for each payment against the agreement.
- For detailed instructions on how to enter an invoice see Chapter 1 - Page 6 of the Specialty Forms User Guide.

If you have any questions on completing the form, please call PantherExpress Customer Service at 412-624-3578.