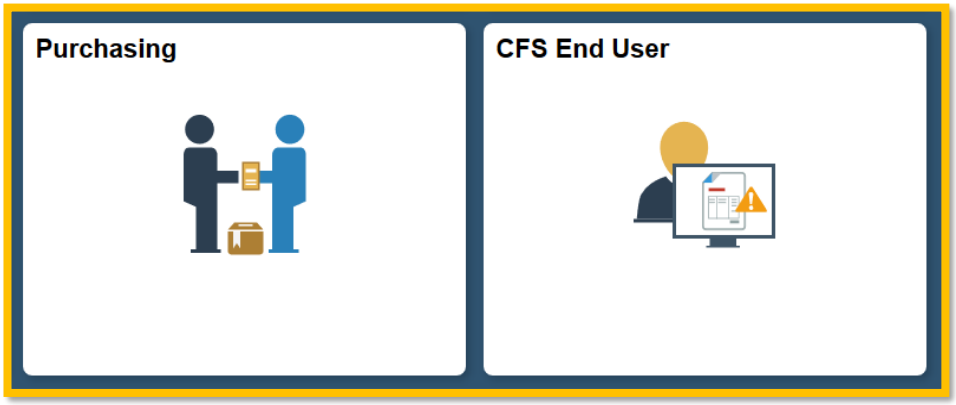
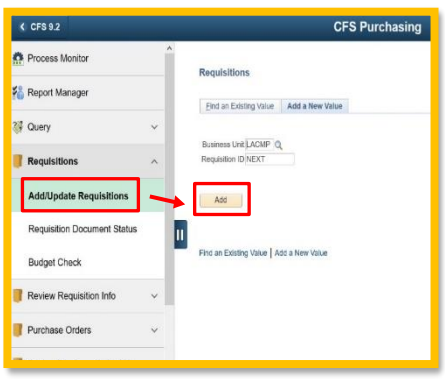
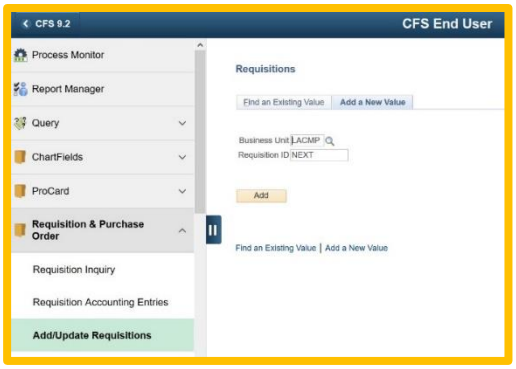
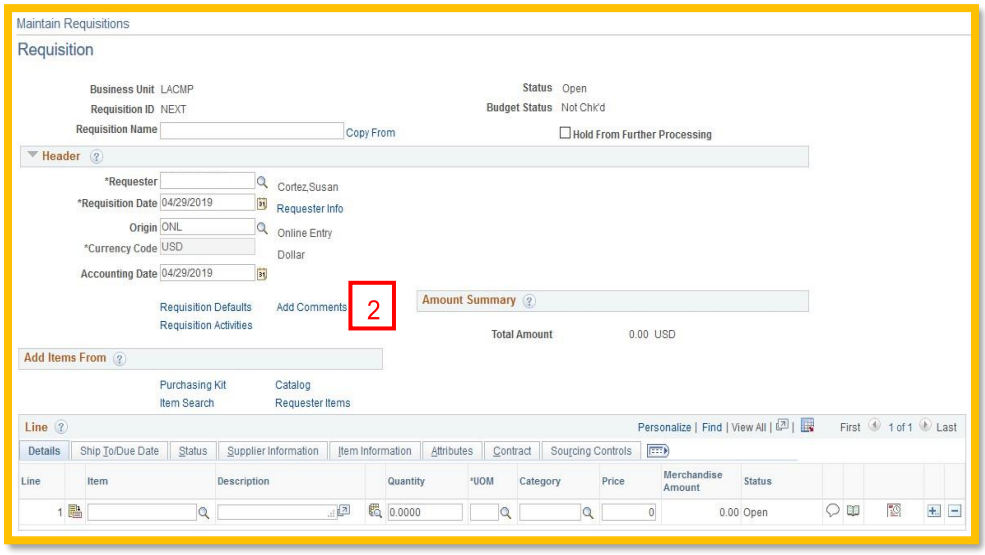
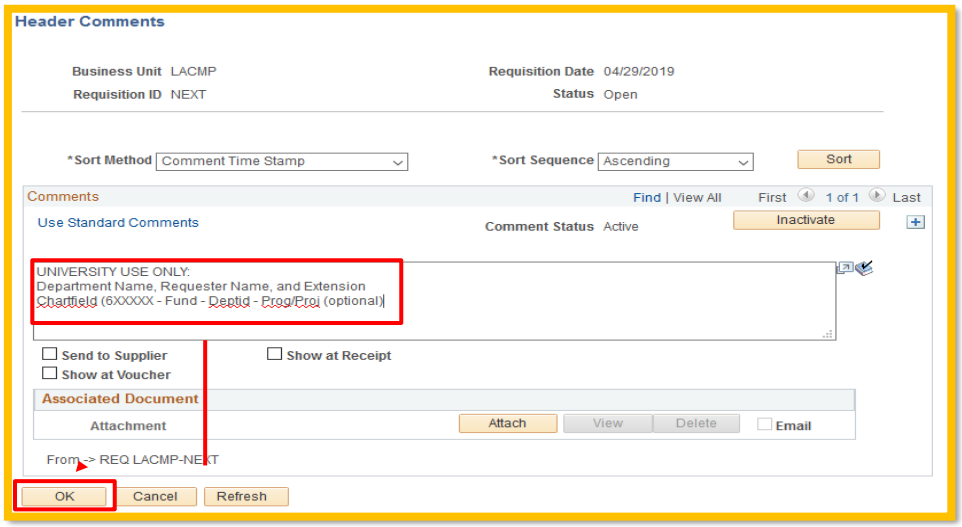
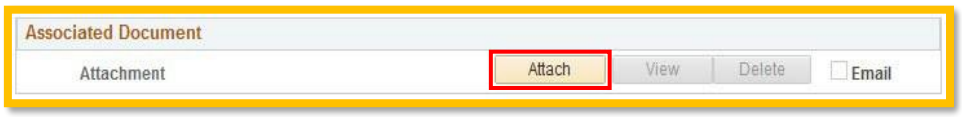
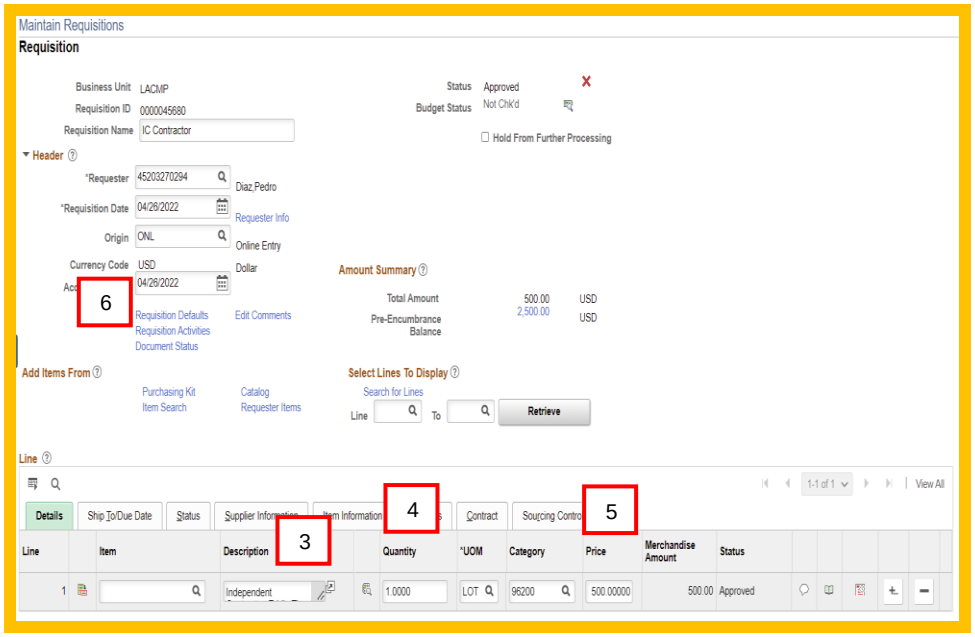
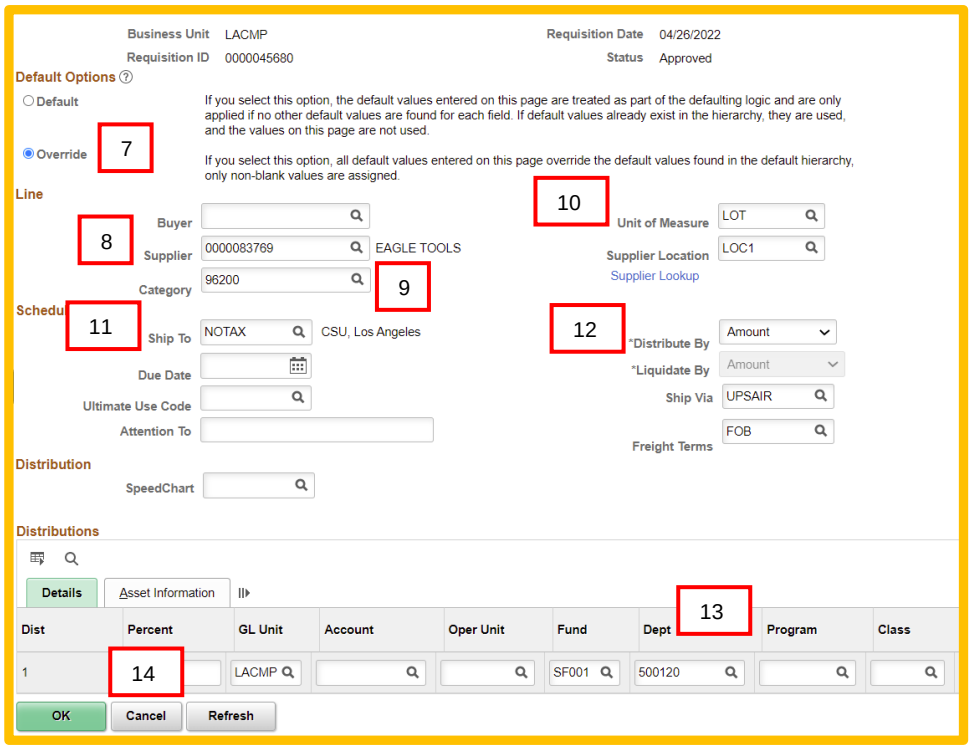
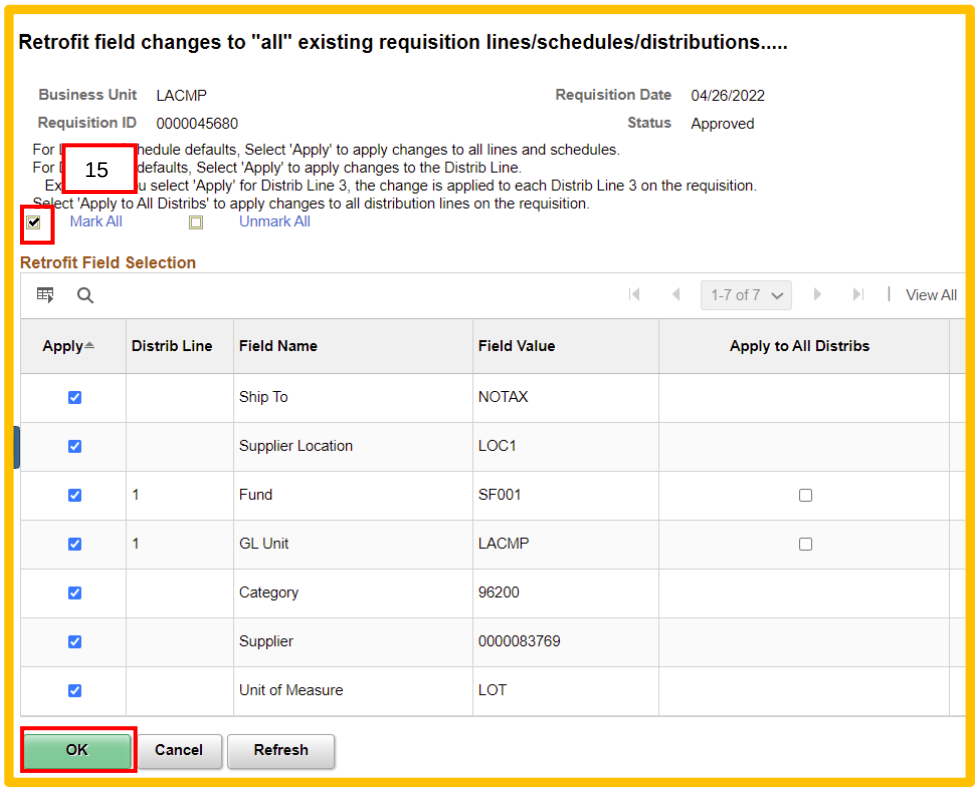
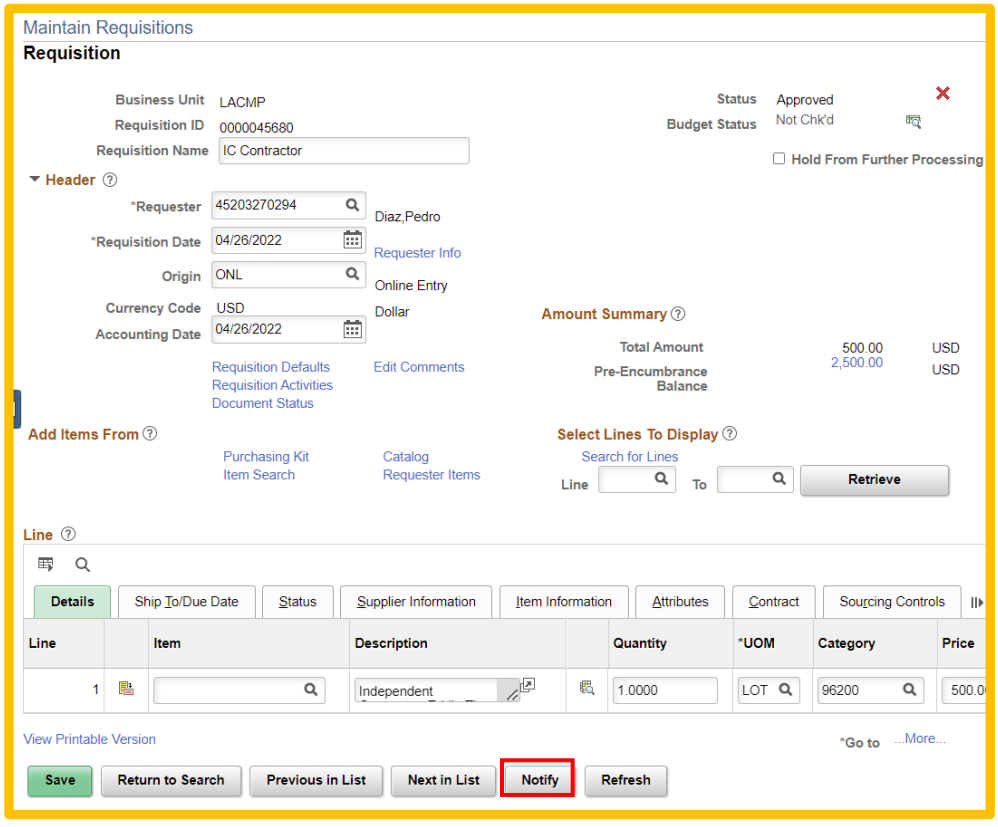
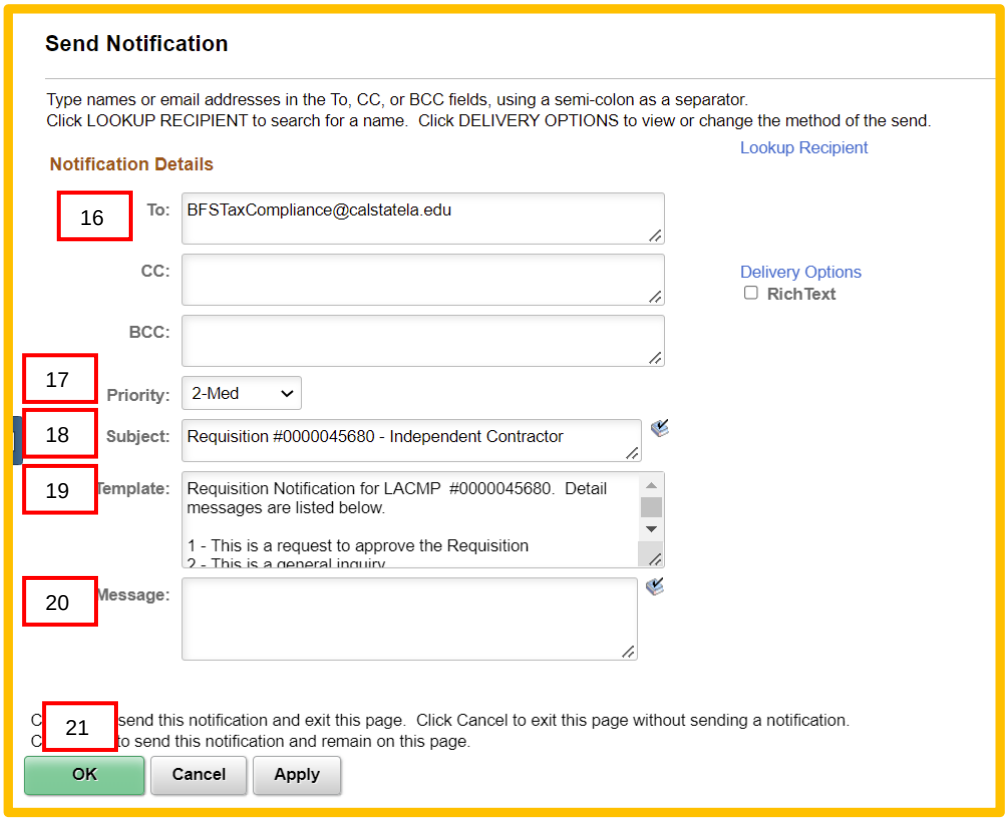
Processing Steps / Field Name	Screenshot / Description
Click on either the Purchasing or CFS End User navigation tile and navigate to Add/Update Requisition.	
1. Click on **Add**.	 
Maintain Requisition Page 2. Click on Add Comments	

Processing Steps / Field Name	Screenshot / Description
Add Comments Page Add the following comments: UNIVERSITY USE ONLY: Department Name, Requestor Name, and Extension **BUILDING, ROOM NUMBER** Chartfield (ex. 6XXXXX-SF001-5XXXXX) When finished, click on the OK button. **Note: Attach the approved completed IC form** on this page. Click on the **Attach** button to upload your document, then click on the OK button to return to the **Maintain Requisitions** page.	 
Maintain Requisition Page 3. **Description:** Enter the line item starting with the Description of Service, and Independent Contractor. 4. **Quantity:** Enter a quantity of '1' and UOM Lot. 5. **Price:** Enter the price (total). 6. Click on **Requisition Defaults** (located to the left of the Add Comments link).	

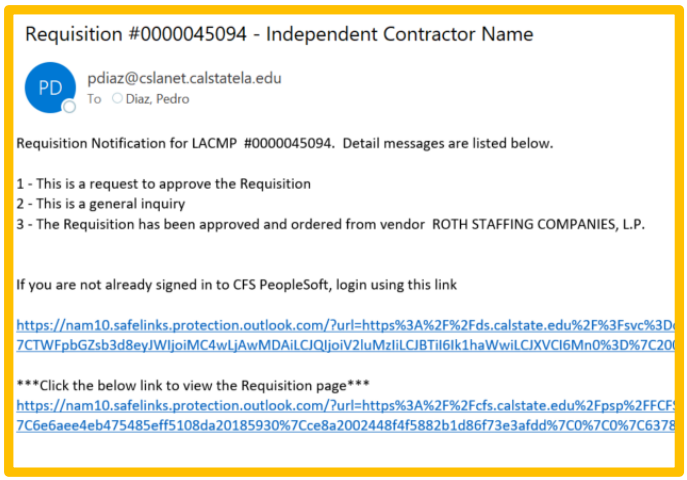
Processing Steps / Field Name	Screenshot / Description
Requisition Defaults Page 7. **Override:** Click on the radio button. 8. **Supplier:** Enter if you have a preferred vendor. Click on 🔍 to look up the supplier id. 9. **Category:** Click on 🔍 to view a list of choices (ex. 96219-Catering, 96200-Misc Serv, 92403-Spec Lec or 92401-Guest Artist). Make sure the **Buyer** section remains blank. 10. **LOT** = Service or open orders . 11. **Ship To:** Open and Service = NOTAX 12. ***Distribute by/*Liquidate by:** Service = Amount 13. **Financial Chartfield:** Enter your **Dept ID** and **Fund**. **Program** is an optional field. Leave the **Account** field blank, it will auto-populate based on the Category code chosen. 14. When finished, click on the OK button. The following page will display:	

Processing Steps / Field Name	Screenshot / Description
15. Click on **Mark All** to check all the boxes and OK to return to the main page. **NOTE:** You can return to **Requisition Defaults** at any time if you add additional lines later or need to change one of these values.	
ONE-STOP NOTIFICATION Maintain Requisition Page Click on **Notify** on the main page.	

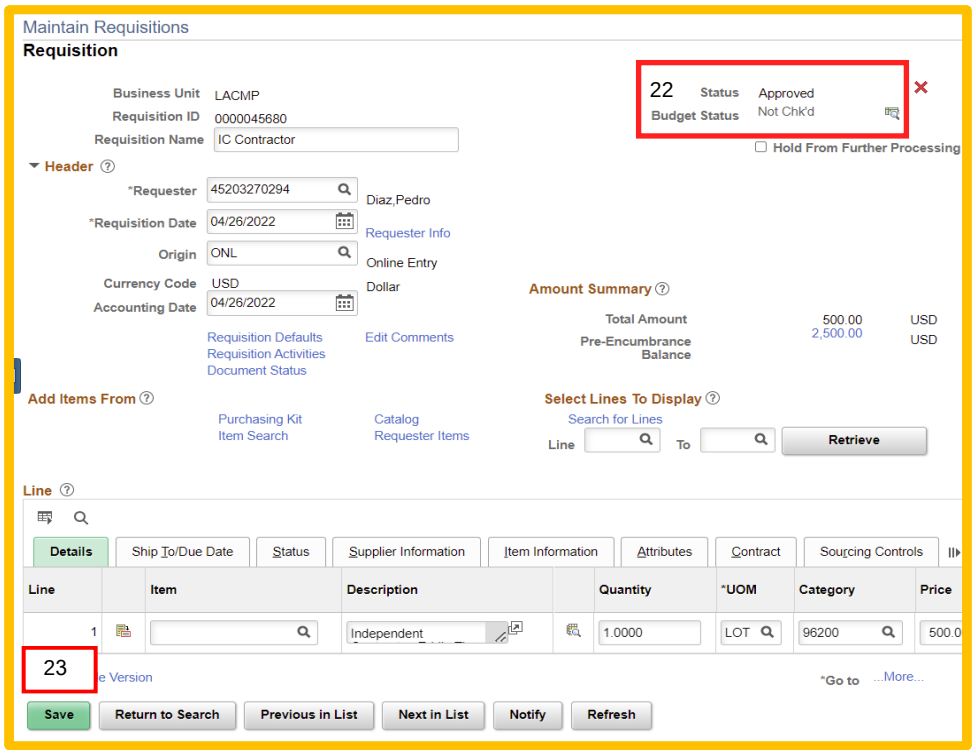
Processing Steps / Field Name	Screenshot / Description
16. **To:** Enter BFSTaxCompliance@calstatela.edu email address **CC:** Optional field **BCC:** Optional field 17. **Priority:** Default; do not edit 18. **Subject:** Include "Independent Contractor and Name" 19. **Template:** Default; do not edit 20. **Message:** Add special instructions 21. Click on OK to send the email notification to the ONE-Stop and to return to the main page. **NOTE:** The ONE-STOP reviews IC form packages that have been received for accuracy and completeness. If clarification is required, the departments will be contacted via the requisition notification process.	

NOTE: The ONE-STOP reviews IC form packages that have been received for accuracy and completeness. If clarification is required, the departments will be contacted via the requisition notification process.

Email Notification Sample



NOTE: Please see **Appendix A** at the end of the document for a complete guide to the following: *Requestor Notifies Approver to Approver Req, Approver Notifies Requestor Req has been Approved, Requisition to Check Notification Process*

Processing Steps / Field Name	Screenshot / Description
NOTE: If you have items that are a different category, UOM or chartfield, change the row after you finish your requisition defaults. 22. Budget check and approve 23. Click on the Save button at the bottom of the page. Once the save is complete, the **Requisition ID** field will change from 'NEXT' to the assigned requisition number. Make note of this number. Contact your approver to approve the requisition.	 **NOTE:** If any required fields are missing, you will receive a warning message. All required fields will need to be filled out before the page can be saved.