



Procurement Workday Updates: *Contactor/Supplier Information (PUR-CR) Process Changes*

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Procurement Workday Updates | Contactor/Supplier Information (PUR-CR)

Process Changes

Contractor/Supplier-related

- Form has been "shortened" with Contractor/Supplier-related questions only.
 - LSU-related questions shifted into Workday.*
- Instructions/Job aid has been created for Contractors/Suppliers to assist while navigating the new PUR-CR process.
 - Procurement website through Adobe Sign confirmation.*
- Contractor/Supplier Information (PUR-CR) must be filled out for **all non-competitive** Professional, Specialty, and Consulting (PSC) service engagements.
 - Only exception: PSC agreements related to Subawards using the "Subrecipient Payments - Grants and Contracts (SC0084)" spend category.*

LSU Procurement

Policies & Procedures ▾ Departments ▾ Suppliers ▾ Workday ▾ A-Z Index Staff Supplier Engagement Related Department

PSC Contractor/Supplier Information (PUR-CR)

This form is used to gather information about the contractor/supplier such as their relationship to LSU and its employees. It is required for all Professional, Specialty, and Consulting (PSC) requisitions not subject to competition.

[Instructions for Completing the PUR-CR via Adobe Sign](#)

Note: Upon receipt of the completed Adobe Sign document, the PSC Contractor/Supplier must forward the completed Adobe Sign document to the LSU department point of contact to attach to the Workday Requisition.

Options ▾ Please sign: FRM-U505.CD.01 - PUR-CR (Revised 11/19... Next Required 11)

LSU Procurement

PSC CONTRACTOR/SUPPLIER INFORMATION

Complete this form to provide Contactor/Supplier information to be evaluated in the execution of a Professional, Specialty or Consulting Services (PSC) purchase order/contract. Form is to be completed for all non-competitive PSC purchases regardless of the dollar amount.

This form must be completed by the Contactor/Supplier.

Upon receipt of the completed Adobe Sign document, forward it to the LSU Department point of contact.

Contractor/Supplier Name: *	Contractor/Supplier Contact Name: *
Address Line 1: *	Contractor/Supplier Contact Email: *
Address Line 2: *	LSU Department contracting with Contractor/Supplier for Services: *
City, State, Zip Code: *	

- Is the Contactor/Supplier a current LSU employee or does an LSU employee have an ownership interest in the Contactor/Supplier?
If "Yes", must submit employee's approved PM-11 or PM-67 approval with this form. YES NO
- Will the Contactor/Supplier employ a current LSU employee in the execution of this contract?
If "Yes", must submit employee's approved PM-11 or PM-67 approval with this form. YES NO
- Has the Contactor/Supplier been an employee of LSU in the past two years? YES NO

Powered by Adobe Acrobat Sign

Procurement Workday Updates | Contactor/Supplier Information (PUR-CR)

Process Changes

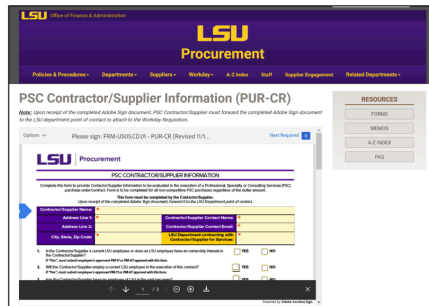
PSC CONTRACTOR/SUPPLIER INFORMATION (PUR-CR) VIA ADOBE SIGN

The PSC Contractor/Supplier Information (PUR-CR) form is located at: <https://www.lsu.edu/administration/dfa/procurement/a-z-policies-procedures/pur-cr.php>

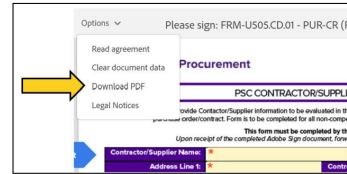
- Navigate to the PSC Contractor/Supplier Information (PUR-CR) form by clicking on the direct link above or by visiting the LSU Procurement website.
 - If using the LSU Procurement website (<http://procurement.lsu.edu>), under "Resources" on the right-hand side, click "Forms" → scroll down to "Professional, Specialty & Consulting Services Forms" → click "Contractor Information (PUR-CR)."

Form Name	Form Number	Purpose
Contractor Information (PUR-CR)	FRM-U505.CD.01	To gather information about the supplier such as their relationship to LSU and its employees as well as outline specific payment terms. Required for all PSC requirements not subject to competition.
Scope of Services (PUR-SS)	FRM-U505.CD.02	To gather details on the services being provided by the supplier as well as specific deliverables, goals and objectives.
Subaward Processing Checklist	N/A	Outlines the process for establishing Subawards.

- The PSC Contractor/Supplier Information (PUR-CR) will be completed using an Adobe Sign web form, hosted on the LSU Procurement webpage (an Adobe Sign license is not required to fill out and Sign via Adobe Sign).

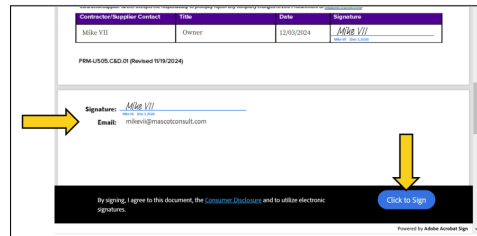


- If the PSC Contractor/Supplier wants to "review" the PSC Contractor/Supplier Information (PUR-CR) before starting to fill out the Adobe Sign web form, they can click the "Options" drop-down menu and select "Download PDF" as shown below.
 - Note: a PUR-CR that was downloaded and manually filled out and/or submitted will not be accepted. The Contractor/Supplier **must use** the Adobe Sign web form hosted on the Procurement website to complete the process.



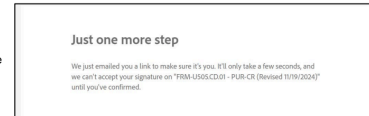
- If the PSC Contractor/Supplier starts filling out the PSC Contractor/Supplier Information (PUR-CR) fields and makes an incorrect selection and cannot "unselect" the incorrect field, they can click the "Options" drop-down menu and select "Clear document data" as shown in the screen shot above.

- Upon completion of the PSC Contractor/Supplier Information (PUR-CR) form, the Contractor/Supplier will sign the form via Adobe Sign and enter their email address under their signature on the 2nd page and then click the "Click to Sign" button at the bottom of the Adobe Sign document as shown below.

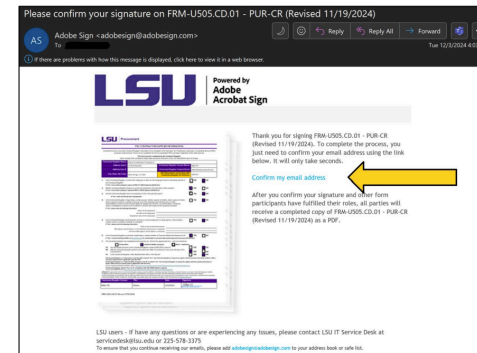


Job aid for PSC Contractor/Supplier Information (PUR-CR) via Adobe Sign

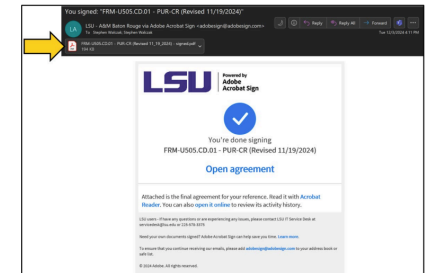
- After the Contractor/Supplier selects the "Click to Sign" button, they see the following message populate in the Adobe Sign frame.



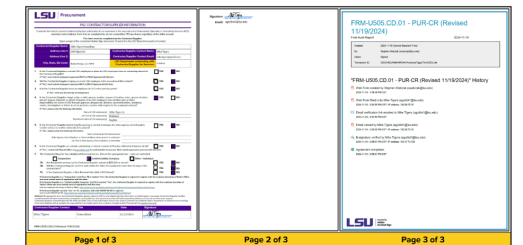
- The Contractor/Supplier will receive a confirmation email from Adobe Sign with LSU branding, asking the Contractor/Supplier to click the "Confirm my email address" link as verification/certification that they filled out and submitted the PSC Contractor/Supplier Information (PUR-CR) form on their own behalf.



- After the Contractor/Supplier confirms their email address, they will receive a final email from Adobe Sign with the signed or "executed" Adobe PDF with the corresponding Adobe Sign audit trail.



- Upon receipt of the completed Adobe Sign document, PSC Contractor/Supplier must forward the completed Adobe Sign document to the LSU department point of contact to attach to the Workday Requirement.
 - The "executed" PDF will be three (3) pages:
 - Page 1 - PSC Contractor/Supplier Information (PUR-CR) filled out & signed
 - Page 2 - Adobe Sign signature & email address
 - Page 3 - Adobe Sign audit trail





Procurement Workday Updates | Contactor/Supplier Information (PUR-CR) Process Changes

Change from current PUR-CR process.

1. Contactor/Supplier affidavit added
 - *They must acknowledge & sign, certifying the information they filled in is correct/valid.*
2. Contactor/Supplier portion will occur via Adobe Sign web form hosted on the LSU Procurement website
 - *Same iFrame format as the LSU Supplier Registration Form.*
3. Contactor/Supplier must verify their email of submission via an email from Adobe Sign
 - *The Contactor/Supplier will forward the "signed" PDF received from Adobe Sign in their email to the end user(s) in the LSU Department requesting Contactor/Supplier services.*
 - **A downloaded copy without the Adobe Sign audit trail will not be accepted.**
 - *The LSU Department end user will submit the Adobe Sign PUR-CR on the Workday Requisition to fulfill the PUR-CR attachment requirement.*

Process Changes

LSU Procurement

PSC CONTRACTOR/SUPPLIER INFORMATION

Complete this form to provide Contactor/Supplier information to be evaluated in the execution of a Professional, Specialty or Consulting Services (PSC) purchase order/contract. Form is to be completed for all non-competitive PSC purchases regardless of the dollar amount.

This form must be completed by the Contactor/Supplier.

Upon receipt of the completed Adobe Sign document, forward it to the LSU Department point of contact.

Contractor/Supplier Name:	Mike Tigers Consulting	Contractor/Supplier Contact Name:	Mike Tigers
Address Line 1:	1234 Tigers Dr.	Contractor/Supplier Contact Email:	miketigers@gmail.com
Address Line 2:		LSU Department contracting with Contactor/Supplier for Services:	VetMed
City, State, Zip Code:	Baton Rouge, LA 70803		

1. Is the Contactor/Supplier a current LSU employee or does an LSU employee have an ownership interest in the Contactor/Supplier? YES NO

If "Yes", must submit employee's approved PM-11 or PM-67 approval with this form.

2. Will the Contactor/Supplier employ a current LSU employee in the execution of this contract? YES NO

If "Yes", must submit employee's approved PM-11 or PM-67 approval with this form.

3. Has the Contactor/Supplier been an employee of LSU in the past two years? YES NO

If "Yes", what was the last day of employment:

4. Is the Contactor/Supplier a legal entity, a child, spouse, brother, spouse of brother, sister, spouse of sister, parent, spouse of parent, or parent of spouse of an LSU employee who will take part, or share responsibility, for action of LSU through approval, disapproval, decision, recommendation, rendering advice, investigation or failure to act or perform a service with respect to the proposed contract? YES NO

If "Yes", please enter the following information:

Name of LSU employee(s): Mike Tigers Jr.
 Job Title of LSU employee(s): Professor
 Department name of LSU employee(s): English

5. Is the Contactor/Supplier performing the services a current employee of a state agency, school system, charter school, or another university in Louisiana? YES NO

If "Yes", please enter the following information:

Name of person performing services:
 State Agency, School System, or University Name where person is employed:
 Job Title at State Agency, School System, or University:

6. Is the Contactor/Supplier an actively contributing or retired member of Teachers Retirement System of LA? YES NO

If "Yes", contact LSU Payroll Office at payroll@lsu.edu for authorization to proceed. Must submit approval to proceed with this form.

7. The Contactor/Supplier has established their business as: (Check the appropriate box – only one selection)

Corporation Limited Liability Company Other / Individual

7A. Are the quoted services by the Contactor/Supplier valued at \$25,000 or above? YES NO

7B. Will the Contactor/Supplier perform work within the State of Louisiana for more than 30 days of the contract term? YES NO

7C. Is the Contactor/Supplier a Non-Resident Alien (Not a US Citizen)? YES NO

If Contactor/Supplier is a "Corporation" and 7A or 7B is marked "Yes", the Contactor/Supplier is required to register with the Louisiana Secretary of State's Office and must submit proof of registration with this form.

If Contactor/Supplier is a "Limited Liability Company" and 7A is marked "Yes", the Contactor/Supplier is required to register with the Louisiana Secretary of State's Office and must submit proof of registration with this form.

Link to Louisiana Secretary of State's Office: <http://www.sos.la.gov/BusinessServices/FileBusinessDocuments/Pages/default.aspx>

If Contactor/Supplier marked "Yes" on 7C, compliance with LSU FASOP AS-04 is required.

Link to LSU FASOP AS-04: <https://www.lsu.edu/administration/clair/aspops/v23/aspops04may2023.pdf>

Affirmative: By signing this form, the Contactor/Supplier agrees, solemnly affirms, and attests that the information provided herein is accurate. Contactor/Supplier certifies compliance with all referenced policies, procedures, and guidelines; and agrees to provide LSU with supporting evidence of such at any time upon request.

Contractor/Supplier acknowledges that its willful and false claim of any information herein may result in contract cancellations and/or suspension or debarment proceedings. Contactor/Supplier further accepts the responsibility to promptly report any company changes to LSU Procurement at suppliers@lsu.edu.

Contractor/Supplier Contact	Title	Date	Signature
Mike Tigers	Consultant	11/19/2024	 Mike Tigers (Nov 19 2024 14:54 CST)

FRM-U505.C&D.01 (Revised 11/19/2024)

Signature: 
 Email: aguillot1@lsu.edu

FRM-U505.CD.01 - PUR-CR (Revised 11/19/2024)

Final Audit Report

2024-11-19

Created: 2024-11-19 (Central Standard Time)
 By: Stephen Walczak (swalczak@lsu.edu)
 Status: Signed
 Transaction ID: CBJCHBCAABAAffG4AYAwulmjaTojqrzThU4OIZUvJbt

"FRM-U505.CD.01 - PUR-CR (Revised 11/19/2024)" History

- Web Form created by Stephen Walczak (swalczak@lsu.edu)
2024-11-19 - 1:58:36 PM CST
- Web Form filled in by Mike Tigers (aguillot1@lsu.edu)
2024-11-19 - 2:54:50 PM CST - IP address: 130.39.75.15
- Email verification link emailed to Mike Tigers (aguillot1@lsu.edu)
2024-11-19 - 2:54:52 PM CST
- Email viewed by Mike Tigers (aguillot1@lsu.edu)
2024-11-19 - 2:55:00 PM CST - IP address: 130.39.75.15
- E-signature verified by Mike Tigers (aguillot1@lsu.edu)
2024-11-19 - 2:55:01 PM CST - IP address: 104.47.73.126
- Agreement completed.
2024-11-19 - 2:55:01 PM CST

LSU Powered by Adobe Acrobat Sign



Procurement Workday Updates | Contactor/Supplier Information (PUR-CR) Process Changes

LSU-related

- Department-related PUR-CR questions are shifting to Workday via Questionnaire(s)

Requisition Questionnaire *(Initial Requisition submission)*

- Relationship/Ownership Disclosure
- Non-Resident Alien (Non-US Citizen)
- Reimbursement of Travel Expenses
- Method of Payment to Contractor/Supplier
- Department Points of Contact
 - Project Manager Name & Email
 - LSU Department Name & Mailing Address

Change Order Questionnaire *(All subsequent Change Orders to a Purchase Order)*

- Reimbursement of Travel Expenses
- Method of Payment to Contractor/Supplier



Workday Updates & Reminders | Contactor Information (PUR-CR) Process Changes (Cont.)

Demo/Walkthrough of Workday functionality

All Items 6 items ☆ ⚙️ ↻ Created: 11/18/2024 | Due: 11/20/2024

Search: All Items ↑↓

[Advanced Search](#)

Complete PUR-CR Contractor Information Form: RQ-0000295529 11/18/2024 ☆
Due: 11/20/2024

Complete PUR-CR Contractor Information Form

'PUR-CR Contractor Information Form (LSU Contract Manager Portion)' for Requisition: RQ-0000295529, Requester: Leah Wintz (00058053), Date: 11/18/2024, Amount: 2,000.00 USD

PUR-CR Contractor Information Form (LSU Contract Manager Portion)

To gather information about the Contractor/Supplier such as their relationship to LSU, the LSU Contract Manager's family, as well as outline specific payment terms.

Does the LSU Contract Manager or Decision Maker, or their child, spouse, brother, spouse of brother, sister, spouse of sister, parent, spouse of parent, or parent of spouse have ownership interest in selected the Contractor/Supplier?
(Required)

Yes
 No

Is the Contractor/Supplier a Non-Resident Alien (Not a US Citizen)?
Compliance with FASOP: AS-04 is required. See <http://www.lsu.edu/administration/ofa/fasops/FASOPAS04.pdf>. Contact Accounts Payable Office at aptravel@lsu.edu for assistance.
(Required)

Yes
 No
 Not Applicable (Contractor/Supplier is a company)



Workday Updates & Reminders | Contactor Information (PUR-CR) Process Changes (Cont.)

Demo/Walkthrough of Workday functionality (cont.)

All Items 0 items

Search: All Items ↕

[Advanced Search](#)

Complete PUR-CR Contractor Information Form: RQ-0000295529 11/18/2024 ☆

Due: 11/20/2024

Will travel expenses be reimbursed to the Contractor/Supplier or paid to others on the Contractor/Supplier's behalf, such as Lod Cook?
(Required)

Yes
 No

What is the estimated amount?
Attach a copy of the spend authorization (SA) to the requisition with a line matching the total amount of travel identified on the SA.
(Required)

If the previous question was answered as "Yes", please attach a copy of the spend authorization here. Please verify the specified requisition line matches the total amount of travel identified on the spend authorization.

Drop files here

or

Select files



Workday Updates & Reminders | Contactor Information (PUR-CR) Process Changes (Cont.)

Demo/Walkthrough of Workday functionality (cont.)

All Items 0 items

Search: All Items

[Advanced Search](#)

Complete PUR-CR Contractor 11/18/2024 ☆
Information Form: RQ-0000295529
Due: 11/20/2024

How will the Contractor/Supplier be paid for services?
The total of payment installments must equal the maximum amount entered on the requisition.
(Required)

- Total lump sum payment upon completion of services
- Hourly
- Daily
- Weekly
- Monthly
- Multiple installments based on specific time frames
- Multiple installments based on completion of tasks

Specify date/amounts of payments.
(Required)

If "multiple installments" were chosen in the previous question, please add your attachment of specifications here.

Drop files here

or

Select files



Workday Updates & Reminders | Contactor Information (PUR-CR) Process Changes (Cont.)

Demo/Walkthrough of Workday functionality (cont.)

All Items 6 items

Search: All Items

[Advanced Search](#)

Complete PUR-CR Contractor Information Form: RQ-0000295529 11/18/2024 ☆

Due: 11/20/2024

Contract Manager Name (Required)

Contract Manager Email (Required)

Department Name (Required)

Department Mailing Address (Required)

Submit Save for Later Cancel



Procurement PUR-CR Process Changes

Questions??

