Q	Can I include attachments with my Special Request requisition?
A	Yes. Attachments are added in the Review & Submit section. At the line level, there is a Comments icon that you can click to add attachments. You should attach Word, Excel or PDF files with proper extensions (.doc .xls .pdf).
Q	Can I use Special Request to order *only* catalog items?
A	No. You should continue to use the catalog ordering process as you do now.
Q	Can I use Special Request if my department gets a better price on an item that is in the P2P catalog price?
A	Yes. Make sure to attach your vendor's price quotation to the Special Request requisition so it can be referenced by all parties involved in the transaction
Q	Can I combine catalog goods and Special Request goods/services on the same Special Request requisition?
A	Yes. However, it is recommended that you add the catalog goods to the requisition first and then proceed to the Special Request section of P2P so you can keep the tasks separate.
Q	What is the difference between Service by Time and Service by Amount?
A	*Service by Time* structures the transaction around a number of units worked (usually Hours) by the rate per unit. For example, a technician that repairs a piece of equipment takes six hours at $50.00 per hour for a total of $300.00 *Service by Amount* structures the transaction around a fixed dollar amount, regardless of unit cost or number of units. For example, a webpage designer creates a website for a UCSF department for $5000, regardless of time worked.
Q	When should I use Service by Amount?
A	You should use Service by Amount when *you* want to make sure the transaction does not exceed a specific dollar amount or when the overall cost of the transaction does not exceed a specified dollar amount.
Q	When should I use Service by Time?
A	You should use Service by Time when the selected vendor provides you with a service quotation that is priced by a specific unit of measure and a corresponding price per unit. Otherwise, Service by Amount is recommended.
Q	How do I add a Good or Service to my Special Request requisition?
A	Once you have completed the required fields (denoted with an asterisk*) click on the 'Add Service" or the 'Add and Start New Type' button at the bottom of the screen. The service is added to the requisition when the screen refreshes and goes blank. You can now navigate to the Review & Submit section.
Q	Why do I receive the following message when I try to navigate to the Review & Submit section of Special Request? Message: "Are you sure you want to leave without adding the Special Request?"
A	You have attempted to navigate to the Review & Submit section without actually adding the service as a line to the requisition. Answer 'No" on the message page to return to the Add Items & Services page. Then click on the 'Add Service' button at the bottom of the page. The service is added to the requisition when the screen refreshes and goes blank. You can now navigate to the Review & Submit section.
Q	Do I have to complete the Vendor Item ID, Mfg Item ID or Mfg ID fields in the Good/Materials Special Request screen?
A	No. They are optional fields in the event the information is provided and relevant to the transaction. The mandatory fields that need to be filled out are identified by an asterisk (*).
Q	Can I use different funds (split funds) on a single Special Request requisition?
A	Yes. You can specify different funds for the entire order or on a per line basis. In addition, you can split funds by percentage or quantity.
Q	Who is responsible for the resolution of Match Exceptions when using Special Request?
A	The buyer of record is responsible for the resolution of Match Exceptions resulting from a Special Request transaction. For orders ≤ $4999.99, the buyer of record is the designated

	Department Buyer. For orders ≥ $5000.00, the buyer of record is the CPBC buyer assigned the order.
Q	What do I do if my vendor is not currently in our PeopleSoft vendor table?
A	You have two options: FAST TRACK: Have the vendor fill out the Vendor Set Up/Substitute W9 Forms at your request and submitted to you directly. You can then attach the completed forms to your Special Request requisition and submit for processing. This will reduce the order's turnaround time by several days. NORMAL TRACK: Submit the Special Request requisition without the Vendor Set Up/Substitute W9 Forms. The order will then route to CPBC and the assigned CPBC buyer will handle the vendor set up process. Please be advised that this will add time to your order being placed, dependent on how long it takes to gather the necessary information from the vendor.
Q	Where do I find the Vendor Set Up/Substitute W9 Forms?
A	The forms are part of a four-page packet (two pages are instructions) that can be found at the following webpage: http://cpbc.ucsf.edu/files/files/VendSetupForm.pdf
Q	Is the Review & Submit section of Special Request different than that of catalog ordering?
A	No. The Review & Submit section of Special Request works exactly the same as in catalog ordering.
Q	Is there a way I can group my Special Request requisitions so that I can review my purchase history at a later date?
A	Yes. In the Review & Submit section there is a field called 'Requisition Name'. Create a naming protocol that would indicate to you, or the appropriate person, what the order was intended for. For example, JonesLab0309DM would indicate the items were purchased for the Jones Laboratory in March 2009 by Don Michaels.
Q	Do we have to receive Services that are ordered via Special Request?
A	Yes. Receipt of Services ordered via Special Request is required. Receipt of Services is performed just like receipt of Goods is currently done in catalog ordering. Receipt of Services allows for 3-way matching (Purchase Order-Invoice-Receipt), thereby facilitating payment to the vendor and reducing the amount of GL reconciliation on the back end.
Q	Do I have to check the Yes or No buttons in the HIPAA portion of the Review & Submit section of Special Request?
A	Yes. If your Special Request requisition has Goods or Services that deal with private health information, you are required to check the Yes button. Your requisition will then be routed to CPBC for further processing. If your Special Request requisition does not have Goods or Services that deal with private health information, check the No button.