

PROFESSIONAL, SPECIALTY & CONSULTING PROCESS CHECKLIST

The purpose of this checklist is to outline Workday actions department end users should take when requesting contracts with suppliers to provide Professional, Specialty and Consulting Services.

Step 1: Locate Supplier Record

1. Search for the supplier in Workday, use the **Find Supplier Report**.

Reference: [Job Aid - Find Suppliers](#)

- a. If found, confirm contact information is accurate, supplier is active status and in the 'Suppliers' category (for procurement usage).
 - i. If contact information is incorrect, have supplier request updates to their supplier record via email to suppliers@lsu.edu. **DO NOT HAVE THEM RE-REGISTER.**
 - ii. If inactive, see notes in the activity stream of the supplier record for explanation of status. For questions, email suppliers@lsu.edu.
 - iii. If in the 'Non-Suppliers' category, the supplier must submit an [LSU Supplier Registration Form](#) to be vetted for procurement usage.
 - b. If not found, the supplier must submit an [LSU Supplier Registration Form](#).
2. Record supplier number (SPL-XXXXX) for future use.

If supplier registration is required

3. Request registration confirmations from the supplier to prove submission and approval of the application.
4. After obtaining approval documentation, use the **Find Supplier** report to obtain their supplier number.

Step 2: Travel Check (ONLY if travel is involved)

If no travel is involved → skip this entire step, proceed to step 3.

5. Search for an **ECM (External Committee Member)** record (see page 1).
Reference: [Job Aid - Non-Worker – Create, Update, and View External Committee Member](#)
 - a. If ECM exists but contact information is incorrect: **Update ECM** (see page 2).
 - b. If ECM exists but is inactive: **Adjust ECM Date** (see page 4).
 - c. If no ECM exists: **Create ECM** – (see page 8).
6. Once ECM is active, create a **Spend Authorization**.
7. Once Spend Authorization is approved, download the PDF to be attached to the requisition questionnaire in Workday.

Step 3: PUR-CR - PSC Contractor/Supplier Information Form

This step should only be initiated AFTER confirming the supplier record is active for procurement usage.

8. Email the [PUR-CR link](#) to the supplier to fill out online.
9. The supplier should email you their 3-page signed PUR-CR form to be attached to the requisition in Workday.

Step 4: Create Requisition (RQ)

10. Departments should create a requisition in Workday prior to the start of services.

Reference: [Job Aid – Create Requisition for Non-Catalog Items - Services](#).

Step 5: Procurement Review

11. Procurement reviews the submission.
12. Once approved, the PO and/or Contract is issued.

Step 6: Payment Process

13. Invoicing is processed through **Accounts Payable or Travel**, based on payment terms.
14. Departments must complete a receipt in Workday.

Reference: [Job Aid – Create Receipt](#)