# How to Enter a PSA Request in Cobblestone Contract Management

## Log in to Cobblestone

- Go Eastern CT website; select Faculty Staff;  Select Campus Resources,  Select Purchasing
- Select Contract/PSA Request – The Cobblestone Template Should Open

| CURRENT BID OPPORTUNITIES | BID RESULTS | CONTRACT/PSA REQUEST |

- 
- Sign in using your Eastern credentials if prompted
- This will bring up a screen: My Dashboard

## Access the Contract Request Form

From the **Main Menu**, **select <u>Add Request</u>** You will move to the Add a New Request Record Screen

**Select PSA as the type of Request you are making- from the drop-down menu:**

### Select a Type

-select type- ▾

-select type-
Contract Request
Nursing Clinical Agreement
PSA
Student Teaching Agreement

## Click Continue

Add New Request Record                                                                                 Back t

Add New PSA Record

| Details | Record Info |
|---------|-------------|

### Details

**\*Brief Contract Description**
Title of Request

**\*Vendor Contact Name**

**\*Department** ✛
Contracts Administration ▾

**Contract Details scope of work**
enter scope of work here:

**\*Contracted for services with this university during the past 12 months?**
-- Select One -- ▾

**\*Service Period Start**

**\*Contract Requestor**
Oneil, Heather ▾

**Vendor Contact Phone**

**\*Contract Value**
0.00

**\*Is the vendor currently a state employee?**
-- Select One -- ▾

**\*Project Director**

**\*Service Period End**

**\*Vendor/Facility/Company Name** ✛
-- Select One -- ▾

**\*Vendor Contact Email**

**\*Status**
Request Pending ▾

**\*Does the vendor have an immediate family member who is a state employee?**
-- Select One -- ▾

**\*Project Director Phone**

**Number of Days to Cancel Contract**

**\*The Service Provider / Contractor Agrees To (include special provisions)**

**FEIN/SSN**

**\*Banner Index 1**

**Banner Index Amount 2**

**Banner Index 4**

**\*Total Agreement Not to Exceed**

**Bid Project Name**

**\*Banner Index Amount 1**

**Banner Index 3**

**Banner Index Amount 4**

**\*Payment to be made under the following schedule**

**Bid Number**

**Banner Index 2**

**Banner Index Amount 3**

Next

**Fill in PSA Details**

**Brief** Contract Description:   Enter brief description of services Example – Guest Speaker

Contract Requestor: Your name—If it is another employee you can add them manually

Vendor/Facility Name/Company Name:  Company Name

If the vendor is not in the list—select "New Vendor Not in List" Two new boxes will open where you can enter the new vendor's name

Vendor Contact Name: Fill in the name of the person who you will work with

Vendor Email: Contact Email

Department: Select your department

Contract Value: Amount of Contract

Status: is prepopulated

Is the vendor currently a state employee? Select Yes or No

Does the vendor have an immediate family member who is a state employee? Select Yes or No

Contracted for services with this university during the past 12 months?  Select Yes or No

Project Director: Eastern employee who will be overseeing these services

Project Director Phone: Eastern employee's phone number of who will be overseeing these services

Service Period Start:  Date the services will begin

Service Period Start:  Date the services will end

The Service Provider/Contractor Agrees to (include special provisions):  Enter services they will be provided, when the services will start, time of services, etc..  Example:  John Smith wll be a guest speaker during the Music Departments Colloquium on February 6, 2026 from 1pm-3:30pm in the Betty Tipton Room at Eastern CT State University.

Total Agreement Not to exceed: Dollar Value of Services

Payment to be made under the following Schedule: How is the vendor requesting payment Is it monthly, quarterly, after project completed etc.

Banner Index 1: Enter the banner index that will be charged for this services.  Example: PART03

Banner Index Amount 1: Enter the dollar about to be charge to this banner index.  Example: $100

*If you have more than one banner index, please fill in the Banner Index 2 and Banner Index Amount 2, then Banner Index 3 and Banner Index Amount 3, ect.*

Bid Number and Bid Project Name: Fill in if this is applicable

## Hit the NEXT Button

The following screen is just a review screen, there is nothing you need to fill out, just

## Hit the FINISH Button

**The next screen is a review of all the details you entered for the request**

**Tab 1 Record Details – Review. If you need to edit just click the pencil icon**

Document Authoring Template: File(s) attached to record

**Record Details**    Files    Notes & Additional Info

[31 Debbie Dr Southington CT 06489-2757 ]

**Vendor Contact Name**
John Smith

**Vendor Contact Phone**

**Vendor Contact Email** oneilh@easternct.edu

**Department**
Contracts Administration

**Contract Value**
100.00

**Status**
Request Pending

**Contract Details scope of work**
enter scope of work here:

**Is the vendor currently a state employee?**
No

**Does the vendor have an immediate family member who is a state employee?**
No

**Contracted for services with this university during the past 12 months?**
Yes

**Project Director**
Heather O'Neil

**Project Director Phone**
860-465-5000

**Service Period Start**
1/1/2026

**Service Period End**
1/1/2026

**Number of Days to Cancel Contract**

**The Service Provider / Contractor Agrees To (include special provisions)**
Test guest speaker, John Smith to come to Eastern to talk about how first year students handle being on their own and living at college. Event will be on January 1, 2026 from 1-2pm in the Library.

**Total Agreement Not to Exceed**
200.00

**Payment to be made under the following schedule**
1

**Click Tab 2: File**

**Section 1**

**File Category: select Internal**

**Section 1: Files / Attachments**

Upload File(s) Info.

File Category:
-- Select Category --

File Notes:

Access Level:
Internal

-- Select Category --
Draft
Fully Executed
Internal
Other
Partially Executed

Add Web Document    Import From Cloud

**Drop Files Here**

**Attach all relevant documentation, ex. W9, Scope of Work, Quote, minutes, insurance, etc.**

## Section 2: Submit Request
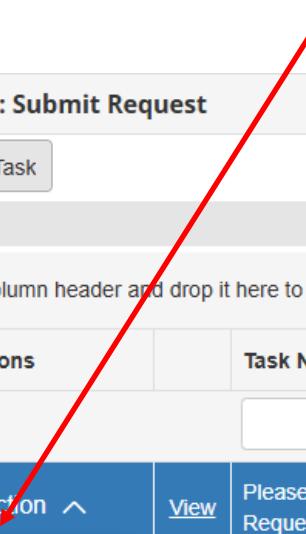
Task Action drop down **Click submit. You are now done**

The



The PSA will automatically generate and will be named PSA-under 5000.docx

**NEXT STEP: SIGNING THE DOCUEMNT**

**Click on the toolbox icon**

**Select the Esign Document button**
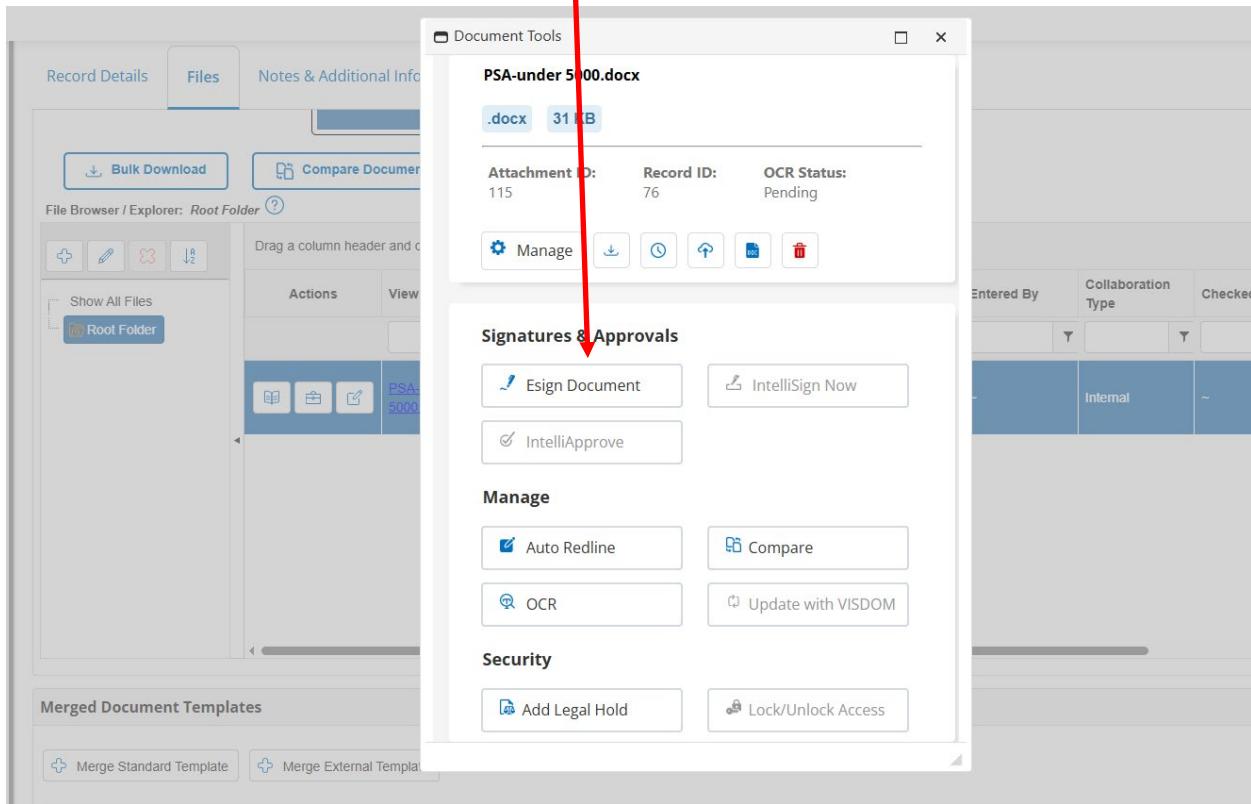


**Select the either DocuSign or Adobe Acrobat Sign button**
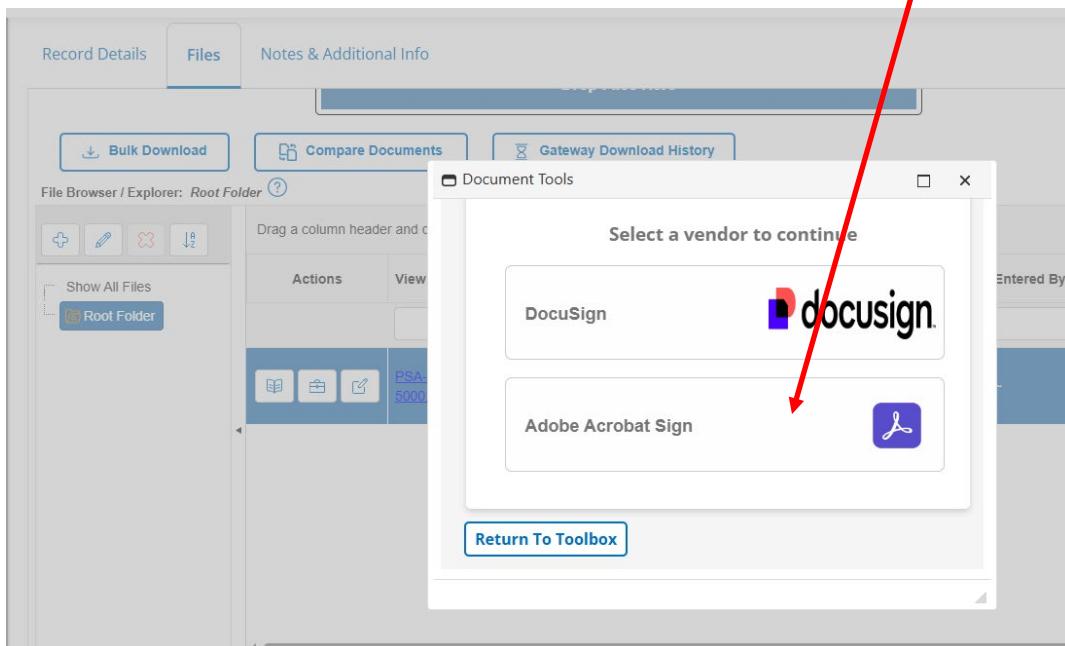
**Select the NEXT button**

Adobe Acrobat Sign

**Record Name:** Test guest speaker

**Documents**
Select the documents to include in the agreement.

| Select | File Name | File Size | Date Added | Uploaded By | Category | File Note |
|--------|-----------|-----------|------------|-------------|----------|-----------|
| ☑ | PSA-under 5000.docx | 31.01 kb | 12/26/2025 8:09:00 AM | | | PSA-under 5000 (Auto Attached from Workflow) |

⇨ Next

**Enter the email addresses that you would like to send for signature (list them in theo order they are to be signed), the agreement Title and any message. Then Select SUBMIT Button.**

**Get documents signed**
Enter the email address of the recipients. Empty or duplicate entries will be discarded before sending.

**Recipients**

| Group Name (Optional) | Email | Recipient Role | Signing Order | Options |
|-----------------------|-------|----------------|---------------|---------|
| Enter Group Name | Enter Email Address | Signer ▼ | 1 | ✖ |

Add    Add Employee    Add Contact

**Agreement Title**    Test guest speaker          Expiration Date    Reminder Frequency

CC Email Address (optional)

**Message**    Please review and sign at Adobe

⇦ Previous    ⇨ Submit

**Select the OK button to begin the upload process**

Create Agreement

Click OK to begin the upload process.

Ok    Cancel

**Select the COMPLETE button to be redirected to Adobe Acrobat Sign or Docusign to complete and send the Agreement.**

Create Agreement

You will now be redirected to Adobe Acrobat Sign to complete and send the Agreement.

Complete
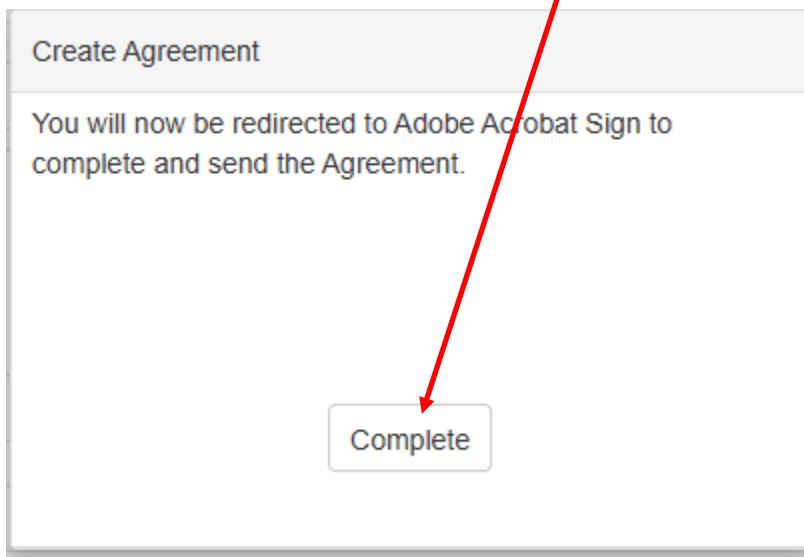
1. Select the vendor's name and place the e-sign , title and date in the SERVICE PROVIDER Section of the PSA.
2. Select the departments Dean name and place the e-sign , title and date in the APPROPRIATE DEAN Section of the PSA.
3. Select the departments VP name and place the e-sign , title and date in the VP-EASTERN Section of the PSA.
4. Select the department's budget authority to sign for the banner dollar amount and banner index and place the e-sign next to the banner indexes.
5. On page 4 of the PSA Template insert a field so the vendor can place their initials next to the nondiscrimination box.
6. REQUIRED: Add purchasing as the final signature approver on all PSA's, use this email to send to purchasing. purchasing@easternct.edu

   *Once the PSA is signed by all parties, the purchasing department will review the PSA to verify that all documentation is complete and compliant with applicable requirements. Upon completion of this review, a purchase order will be issued*

ADD FORM FIELDS FOR ⓘ

purchasing@easter... ▾

ADD FIELDS ⓘ

📄 Field templates ▾

✕ E-signature

🖼 Signature block

LM Initials

👤 Recipient name

✉ Recipient email

📅 Date of signing

T Text

📅 Date

# Number

☑ Checkbox

⦿ Radio button

☑ Drop-down menu

**Send**

NUMBER:
NOTE: If numbers 3 and/or 4 above were answered "Yes" and the contract value of this Agreement is equal to or greater than $100 and the fee is to be
paid as an independent contractor, this contract must have been awarded through an open and public bidding process.

8.

| Banner Index | Signature | Banner Index Amount |
|---|---|---|
| prch00 | | 100.00 |
| part03 | Signature | 100.00 |
| | | |

9. TOTAL VALUE OF THIS SERVICE: 100.00

**TERMS AND CONDITIONS**

10. SERVICE PERIOD: FROM 1/1/2026 TO 1/1/2026    CONTRACT BID AWARD # IF APPLICABLE:

11. NUMBER OF DAYS:

THIS AGREEMENT SHALL REMAIN IN FULL FORCE AND EFFECT FOR THE ENTIRE TERM OF SERVICE PERIOD STATED ABOVE UNLESS CANCELLED BY THE

UNIVERSITY, BY GIVING THE SERVICE PROVIDER WRITTEN NOTICE OF SUCH INTENTION. (REQUIRED DAYS NOTICE SPECIFIED AT LEFT.)

12. THE SERVICE PROVIDER AGREES TO: (DETAILED SERVICES MUST BE PROVIDED ALONG WITH SPECIAL PROVISIONS AS NECESSARY - use separate referenced sheet if necessary.)
Test guest speaker, John Smith to come to Eastern to talk about how first year students handle being on their own and living at college.  Event will be on January 1, 2026 from
1-2pm in the Library.

13. TOTAL AGREEMENT NOT TO EXCEED:    200.00    (ORIGINAL AGREEMENT AMOUNT + ALL AMENDMENTS.)

14. PAYMENT TO BE MADE UNDER THE FOLLOWING SCHEDULE UPON RECEIPT OF PROPERLY EXECUTED AND APPROVED DISBURSEMENT FORM.

1

**ACCEPTANCES/APPROVALS**
**STATUTORY AUTHORITY CGS 10a-151b**

SERVICE PROVIDER OWNER OR AUTHORIZED SIGNATURE)

* Signature
{Recipient name}: {Date and time of signing}    TITLE:    Text    DATE Date (mm/dd/yyyy)

APPROVED BY - EASTERN CONNECTICUT STATE UNIVERSITY AUTHORIZED SIGNATURE:
* Signature
{Recipient name}: {Date and time of signing}    TITLE:    Text    DATE Date (mm/dd/yyyy)

* Signature
APPROPRIATE VICE PRESIDENT - EASTERN CONNECTICUT STATE UNIVERSITY AUTHORIZED SIGNATURE:
{Recipient name}: {Date and time of signing}    TITLE:    Text    DATE Date (mm/dd/yyyy)
REVISED 12-28-22    DOCUMENT NUMBER: **PSA**

**Select the SEND button**

✓

**Test guest speaker** was successfully sent for signature

A PDF copy will be sent to all parties once signing is complete.

## Click Tab 2: File

**Select the <u>TASK Action</u> drop down and click submit.**



**Document has now been sent for signatures.**

The requestor will receive emails via adobe sign or docusign and the requestor can also see this in Cobblestone.