

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



- 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 Add Request** 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

Add New PSA Record

Details Record Info

Details

***Brief Contract Description**
Title of Request

***Contract Requestor**
Oneill, Heather

***Vendor/Facility/Company Name**
-- Select One --

***Vendor Contact Name**

Vendor Contact Phone

***Vendor Contact Email**

***Department**
Contracts Administration

***Contract Value**
0.00

***Status**
Request Pending

Contract Details scope of work
enter scope of work here:

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

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

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

***Project Director**

***Project Director Phone**

***Service Period Start**

***Service Period End**

Number of Days to Cancel Contract

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

***Total Agreement Not to Exceed**

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

FEIN/SSN

Bid Project Name

Bid Number

Banner Index 1

Banner Index Amount 1

Banner Index 2

Banner Index Amount 2

Banner Index 3

Banner Index Amount 3

Banner Index 4

Banner Index Amount 4

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 will 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

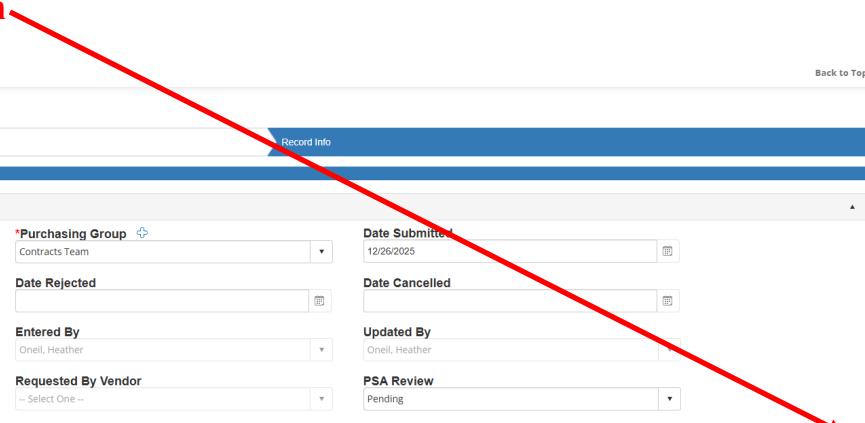
If you have more than one banner index, please fill in the Banner Index 2 and Banner Index Amount 2, then Banner Index 3 and Banner Index Amount 3, etc..

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



Add New Request Record

Add New PSA Record

Back to Top ↑

Details

Record Info

Request Type	Purchasing Group	Date Submitted
PSA	Contracts Team	12/26/2025
Date Accepted	Date Rejected	Date Cancelled
Date Entered	Entered By	Updated By
12/26/2025 8:05 AM	O'Neill, Heather	O'Neill, Heather
Request ID	Requested By Vendor	PSA Review
	-- Select One --	Pending

Previous Finish

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 oneillh@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'Neill	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: Tasks & Files

Section 1

File Category: select Internal

Section 1: Files / Attachments

Upload File(s) Info.

File Notes:

Access Level:
Internal

File Category:
-- Select Category --

-- 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.

Purchasing will receive an Email so they can review the information and make sure the required documents are attached. Once Purchasing approves your request, you will receive an email stating the request has been accepted and know you can forward it for signatures.

Click – click here or log into cobblestone



Below is the information regarding this request:

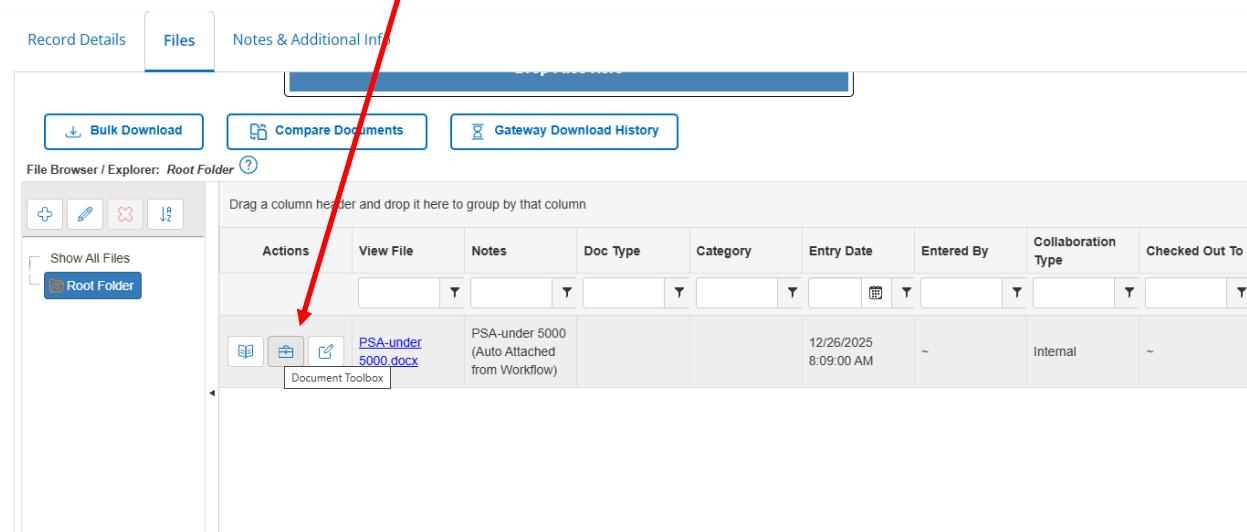
Contract Requestor: Alyssa Duffy Duffy, Alyssa
Vendor/Facility/Company Name: I'm So Facey, LLC
Department: Student Activities
Status: Request Accepted

You can [click here](#) to review this record
or copy and paste the address below:
<https://easternctu.cobblestone.software/Core/default.aspx?navto=ContractRequestDetails.aspx?ID=120>

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

NEXT STEP: SIGNING THE DOCUMENT

Click on the toolbox icon



Record Details Files Notes & Additional Info

Bulk Download Compare Documents Gateway Download History

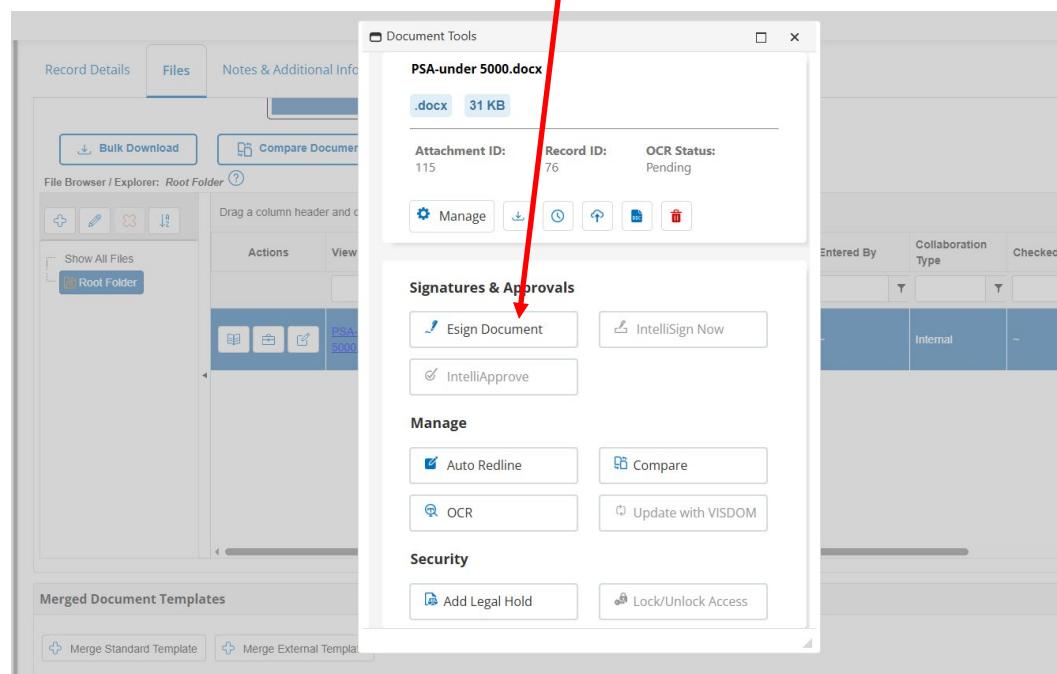
File Browser / Explorer: Root Folder

Drag a column header and drop it here to group by that column

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By	Collaboration Type	Checked Out To
			PSA-under 5000.docx	PSA-under 5000 (Auto Attached from Workflow)	12/26/2025 8:09:00 AM	~	Internal	~

Document Toolbox

Select the Esign Document button



Record Details Files Notes & Additional Info

Bulk Download Compare Documents

File Browser / Explorer: Root Folder

Drag a column header and drop it here to group by that column

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By	Collaboration Type	Checked Out To
			PSA-under 5000.docx	PSA-under 5000 (Auto Attached from Workflow)	12/26/2025 8:09:00 AM	~	Internal	~

Document Tools

PSA-under 5000.docx

Attachment ID: 115 Record ID: 76 OCR Status: Pending

Manage

Signatures & Approvals

Esign Document IntelliSign Now

IntelliApprove

Manage

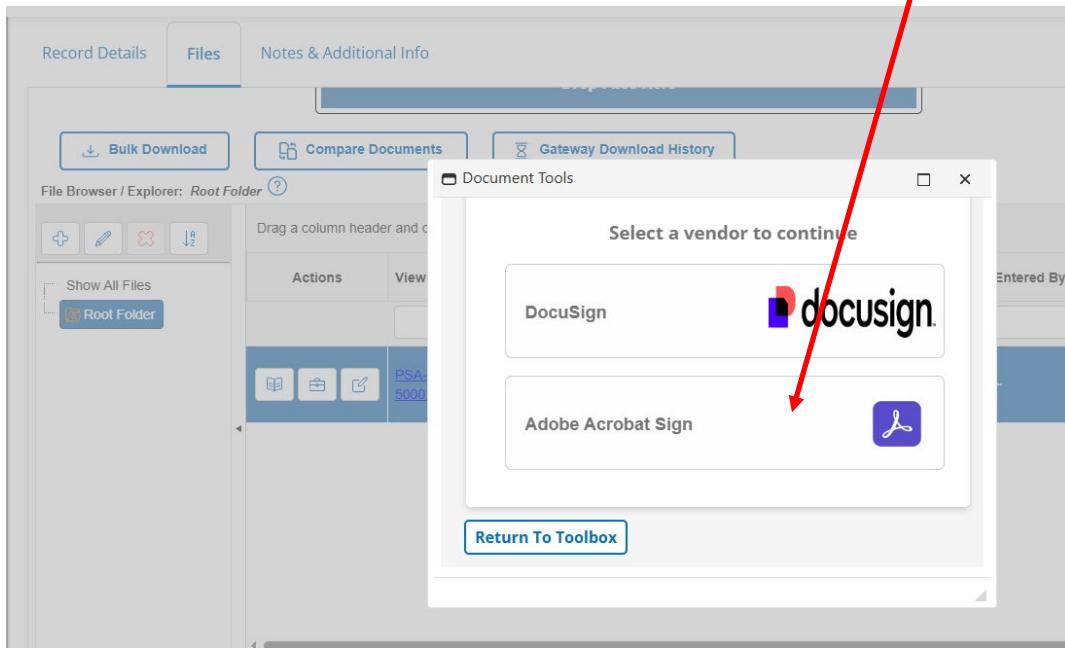
Auto Redline Compare

OCR Update with VISDOM

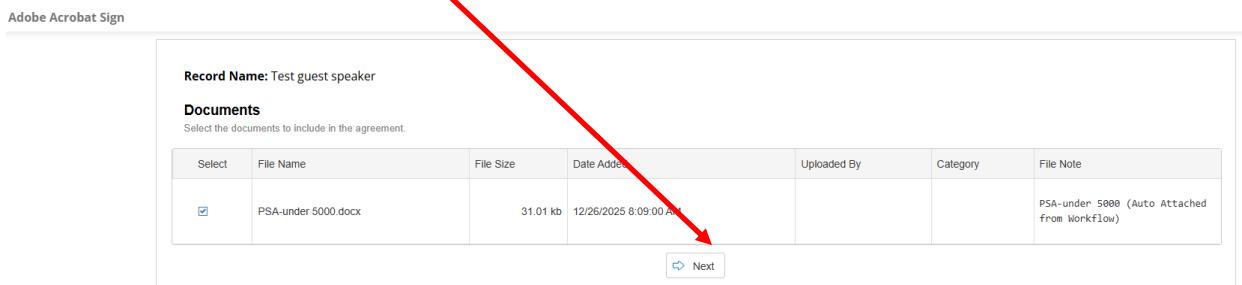
Security

Add Legal Hold Lock/Unlock Access

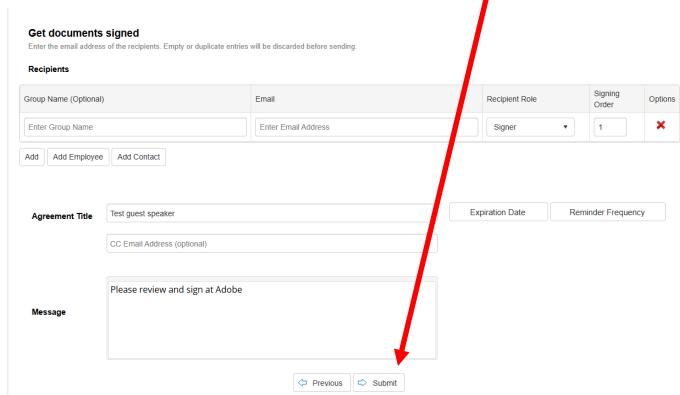
Select the either DocuSign or Adobe Acrobat Sign button



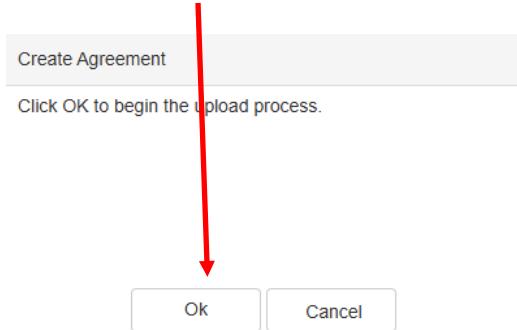
Select the NEXT button



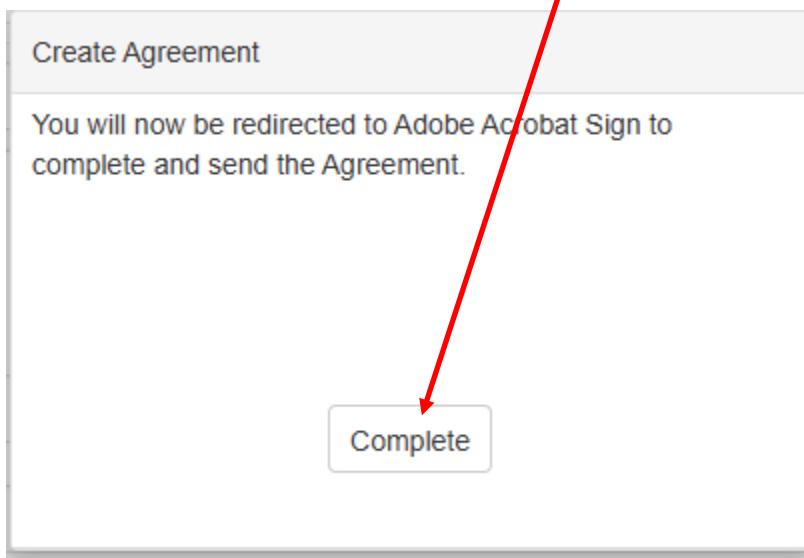
Enter the email addresses that you would like to send for signature (list them in the order they are to be signed), the agreement Title and any message. Then Select SUBMIT Button.



Select the OK button to begin the upload process



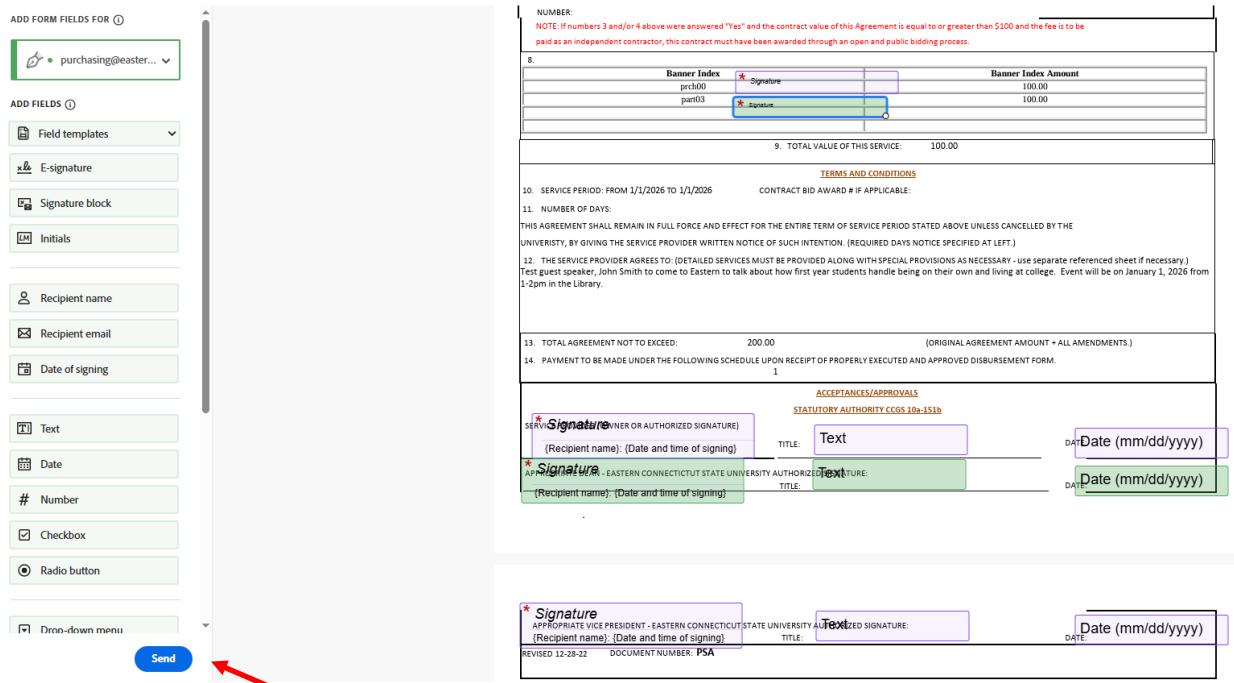
Select the COMPLETE button to be redirected to Adobe Acrobat Sign or DocuSign to complete and send the Agreement.



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 department's Dean name and place the e-sign , title and date in the APPROPRIATE DEAN Section of the PSA.
3. Select the department's 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 (only needed if signing authority is needed for multiple departments.)

5. On page 4 of the PSA Template insert a field so the vendor can place their initials next to the nondiscrimination box.
6. On page 1 of the PSA Template have the SERVICE PROVIDER initial next to lines 3, 4 & 5 to verify these questions are correct.

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



The screenshot shows a digital form interface for a Purchase Service Agreement (PSA). On the left, a sidebar lists various field types: purchasing@easter..., Field templates, E-signature, Signature block, Initials, Recipient name, Recipient email, Date of signing, Text, Date, Number, Checkbox, Radio button, and Drop-down menu. A blue 'Send' button is located at the bottom of this sidebar. The main area displays the PSA template with several sections and fields. A red arrow points from the text 'Select the SEND button' to the 'Send' button in the sidebar.

Select the SEND button

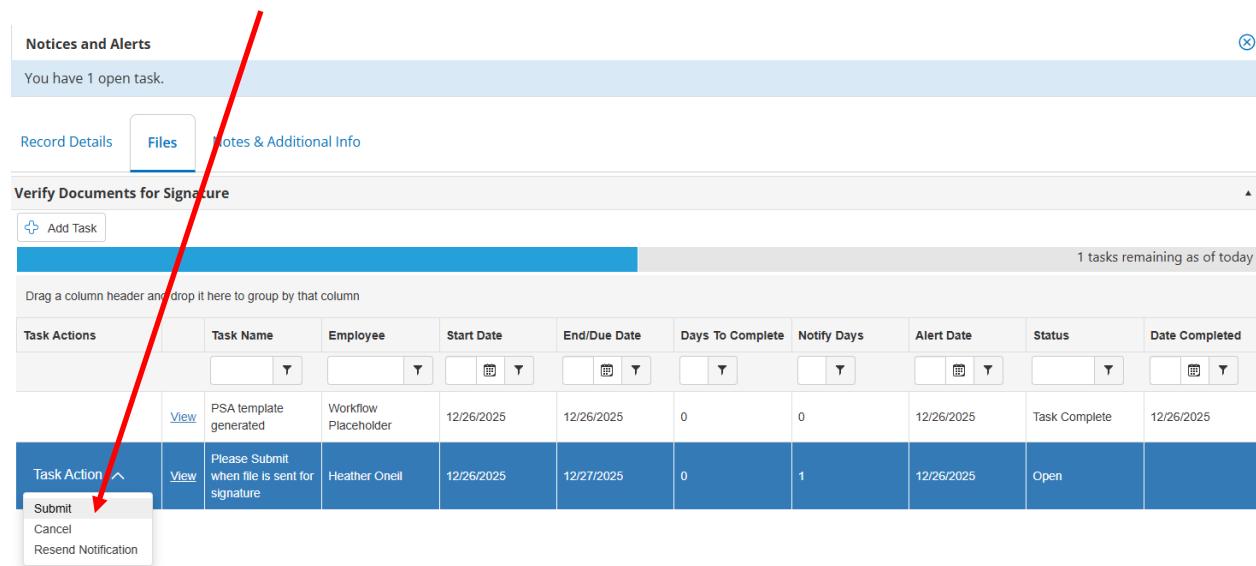


Test guest speaker was successfully sent for signature

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

Click Tab 2: File

Select the Task Action drop down and click submit.



Notices and Alerts

You have 1 open task.

Record Details Files Notes & Additional Info

Verify Documents for Signature

Add Task

1 tasks remaining as of today

Drag a column header and drop it here to group by that column

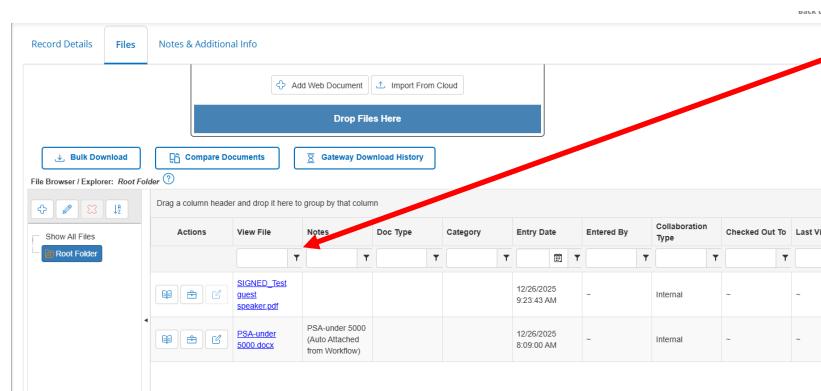
Task Actions	Task Name	Employee	Start Date	End/Due Date	Days To Complete	Notify Days	Alert Date	Status	Date Completed
View	PSA template generated	Workflow Placeholder	12/26/2025	12/26/2025	0	0	12/26/2025	Task Complete	12/26/2025
View	Please Submit when file is sent for signature	Heather O'Neil	12/26/2025	12/27/2025	0	1	12/26/2025	Open	

Task Action ▾

- Submit
- Cancel
- Resend Notification

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.



Record Details Files Notes & Additional Info

Add Web Document Import From Cloud

Drop Files Here

Bulk Download Compare Documents Gateway Download History

File Browser / Explorer: Root Folder

Show All Files Root Folder

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By	Collaboration Type	Checked Out To	Last View
SIGNED_Test_purch_speaker.pdf					12/26/2025 9:23:43 AM	-	Internal	-	-
PSA-under 5000.docx		PSA-under 5000 (Auto Attached from Workflow)			12/26/2025 8:09:00 AM	-	Internal	-	-