

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 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 Back

Add New PSA Record

Details Record Info

Details

*Brief Contract Description <input type="text" value="Title of Request"/>	*Contract Requestor <input type="text" value="Oneil, Heather"/>	*Vendor/Facility/Company Name + <input type="text" value="-- Select One --"/>
*Vendor Contact Name <input type="text"/>	Vendor Contact Phone <input type="text"/>	*Vendor Contact Email <input type="text"/>
*Department + <input type="text" value="Contracts Administration"/>	*Contract Value <input type="text" value="0.00"/>	*Status <input type="text" value="Request Pending"/>
Contract Details scope of work enter scope of work here: <input type="text"/>	*Is the vendor currently a state employee? <input type="text" value="-- Select One --"/>	*Does the vendor have an immediate family member who is a state employee? <input type="text" value="-- Select One --"/>
*Contracted for services with this university during the past 12 months? <input type="text" value="-- Select One --"/>	*Project Director <input type="text"/>	*Project Director Phone <input type="text"/>
*Service Period Start <input type="text"/>	*Service Period End <input type="text"/>	Number of Days to Cancel Contract <input type="text"/>

*The Service Provider / Contractor Agrees To (include special provisions) <input type="text"/>	*Total Agreement Not to Exceed <input type="text"/>	*Payment to be made under the following schedule <input type="text"/>
FEIN/SSN <input type="text"/>	Bid Project Name <input type="text"/>	Bid Number <input type="text"/>
*Banner Index 1 <input type="text"/>	*Banner Index Amount 1 <input type="text"/>	Banner Index 2 <input type="text"/>
Banner Index Amount 2 <input type="text"/>	Banner Index 3 <input type="text"/>	Banner Index Amount 3 <input type="text"/>
Banner Index 4 <input type="text"/>	Banner Index Amount 4 <input type="text"/>	

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 Back to Top ↑

Add New PSA Record

Details

Record Info

Record Info

***Request Type** ⬇

PSA

Date Accepted

Date Entered

12/26/2025 8:05 AM

Request ID

***Purchasing Group** ⬇

Contracts Team

Date Rejected

Entered By

Oneil, Heather

Requested By Vendor

-- Select One --

Date Submitted

12/26/2025

Date Cancelled

Updated By

Oneil, Heather

PSA Review

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 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: Taske & Files

Section 1

File Category: select Internal

Section 1: Files / Attachments

Upload File(s) Info.

File Notes:

Access Level:

File Category:

Draft
Fully Executed
Internal
Other
Partially Executed

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

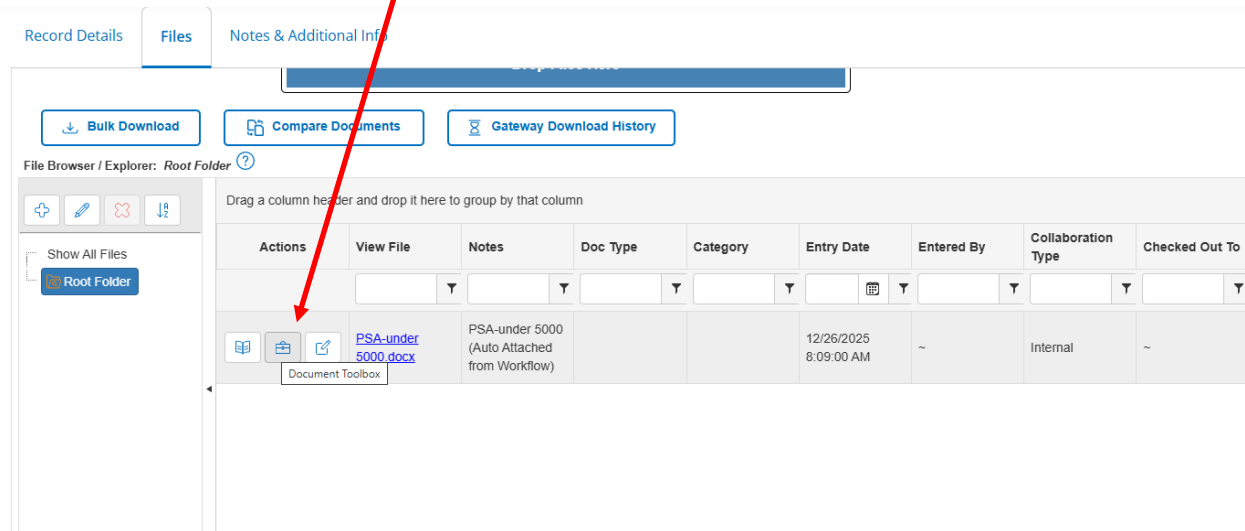
You can [click here](#) to review this record
or copy and paste the address below:

<https://easternctu.cobblestone.software/Core/default.aspx?navto=ContractRequestDetails.aspx?ID=120>

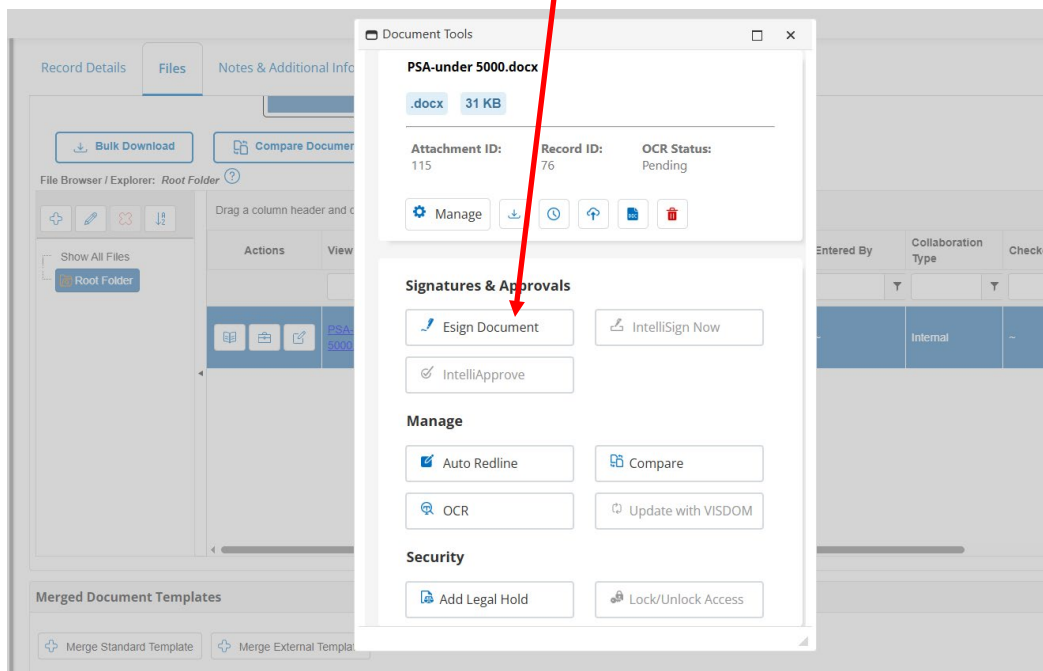
The PSA will automatically generate and will be named PSA-under 5000.docx

NEXT STEP: SIGNING THE DOCUMENT

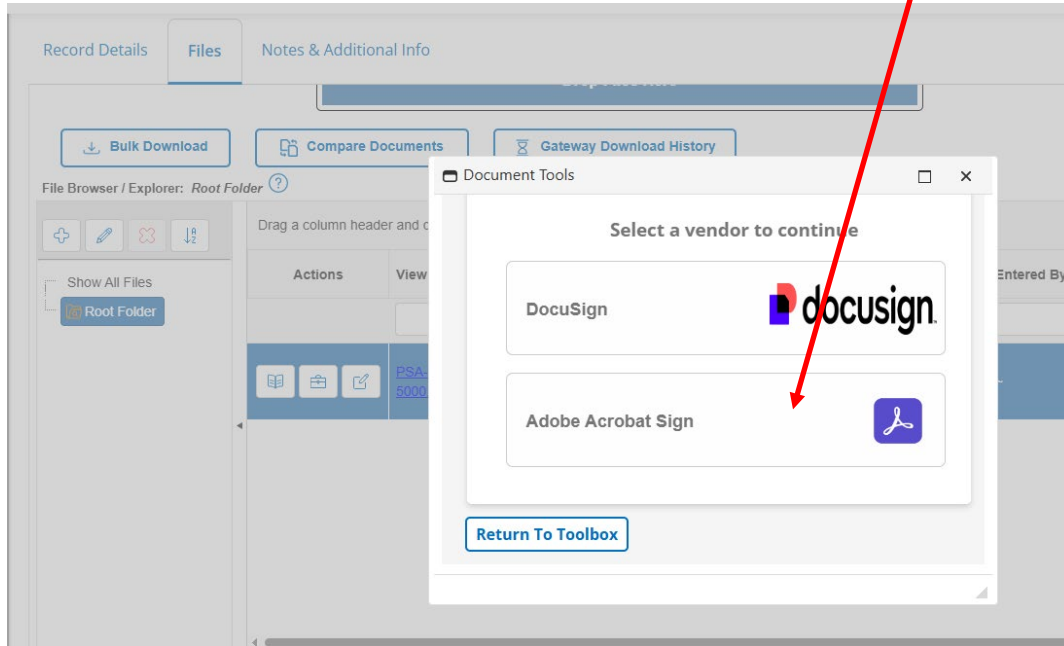
Click on the toolbox icon



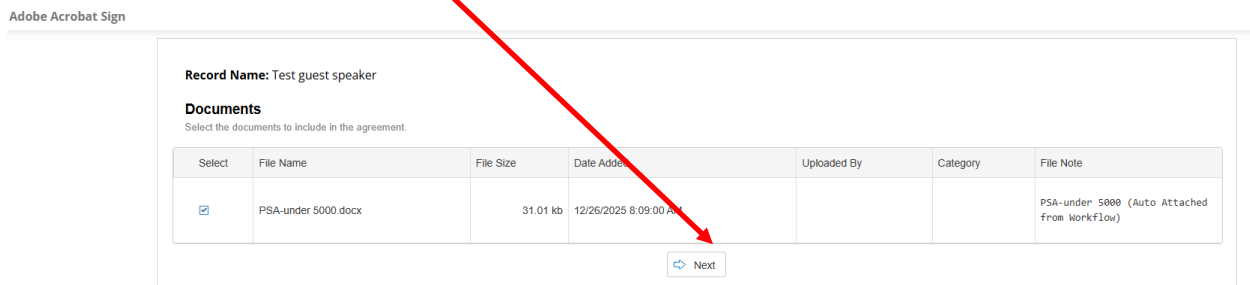
Select the Esign Document button



Select the either DocuSign or Adobe Acrobat Sign button



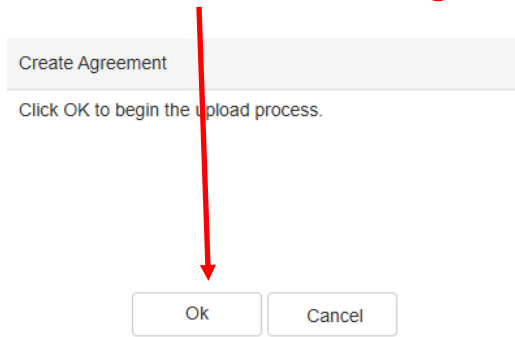
Select the NEXT button



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.

The screenshot shows the 'Get documents signed' form. It has a title 'Get documents signed' and a subtitle 'Enter the email address of the recipients. Empty or duplicate entries will be discarded before sending.' Below this is a 'Recipients' section with a table. The table has columns: 'Group Name (Optional)', 'Email', 'Recipient Role', 'Signing Order', and 'Options'. There is one row with 'Enter Group Name' in the 'Group Name' column, 'Enter Email Address' in the 'Email' column, 'Signer' in the 'Recipient Role' column, '1' in the 'Signing Order' column, and a red 'X' in the 'Options' column. Below the table are buttons for 'Add', 'Add Employee', and 'Add Contact'. Below the recipients section is an 'Agreement Title' section with a text input field containing 'Test guest speaker', a button for 'Expiration Date', and a button for 'Reminder Frequency'. Below that is a 'Message' section with a text input field containing 'Please review and sign at Adobe'. At the bottom of the form are 'Previous' and 'Submit' buttons. A red arrow points from the text above to the '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.)

- On page 4 of the PSA Template insert a field so the vendor can place their initials next to the nondiscrimination box.
- 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

ADD FORM FIELDS FOR ①

purchasing@easter...

ADD FIELDS ①

- Field templates
- E-signature
- Signature block
- Initials
- Recipient name
- Recipient email
- Date of signing
- 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.

Banner Index	Signature	Banner Index Amount
perch00		100.00
perch03		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.

ACCEPTANCES/APPROVALS

STATUTORY AUTHORITY CC65 10a-351b

SERVICE PROVIDER OR AUTHORIZED SIGNATURE: _____ DATE: (mm/dd/yyyy)

(Recipient name): (Date and time of signing)

TITLE: Text

APPROPRIATE VICE PRESIDENT - EASTERN CONNECTICUT STATE UNIVERSITY AUTHORIZED SIGNATURE: _____ DATE: (mm/dd/yyyy)

(Recipient name): (Date and time of signing)

TITLE: Text

APPROPRIATE VICE PRESIDENT - EASTERN CONNECTICUT STATE UNIVERSITY AUTHORIZED SIGNATURE: _____ DATE: (mm/dd/yyyy)

(Recipient name): (Date and time of signing)

TITLE: Text

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 **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
Task Action ▲	View Please Submit when file is sent for signature	Heather Oneil	12/26/2025	12/27/2025	0	1	12/26/2025	Open	

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

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	Last Vis
📄 📁 🔗	SIGNED_Test guest seaker.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	-	-