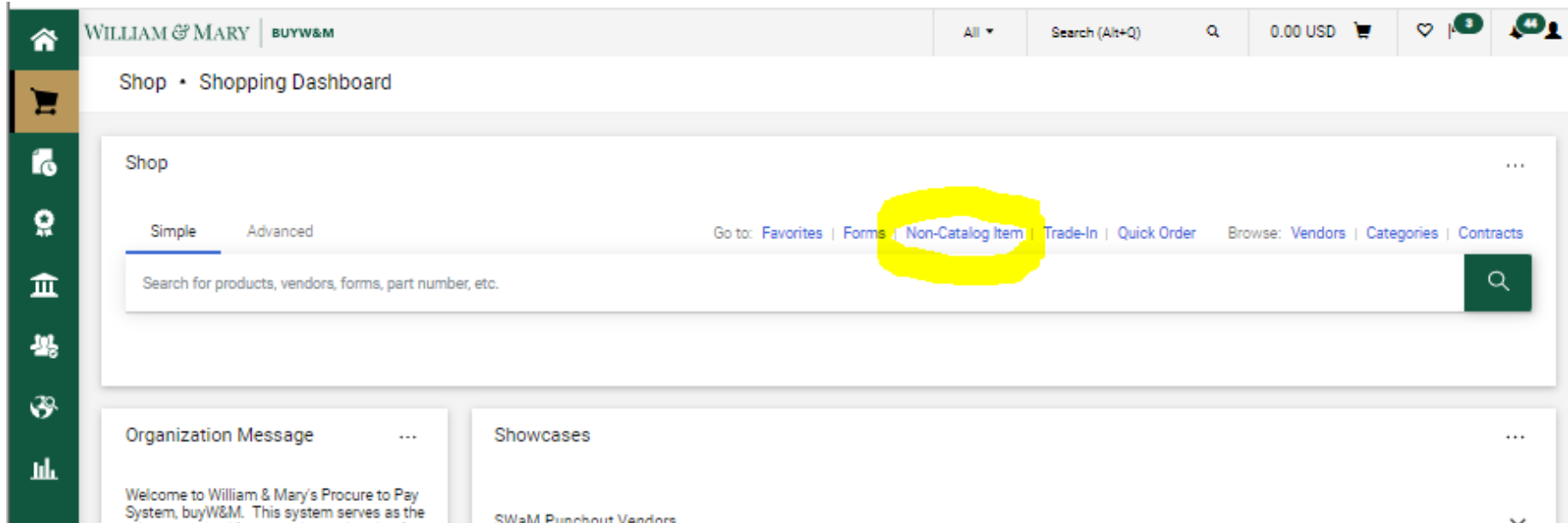


Submitting a Requisition for Independent Contractor Services

Use this instruction guide to complete a requisition for your Independent Contractor in buyW&M

1. From the home page (Shopping Dashboard), click on the 'Non-Catalog Item' shortcut shown below



2. After selecting Non-Catalog Item, a window will pop up. Either type in the vendor name or click on the magnifying glass to select your vendor.
 - a. Enter the Product Description (for example: IC vendor Smith Translation Svcs)
 - b. Leave the Catalog No. field blank
 - c. Enter Quantity (1) and then Price Estimate (total estimated amount)
 - d. Select Save and Add Another until you have added all the necessary items to your shopping cart.
 - e. When complete, select Save.

Add Non-Catalog Item ✕

Existing Vendor

TransOrient Translations ✕ 🔍 TransOrient Translations ✕
Select Vendor Search

Fulfillment Address ∨ **Distribution Methods** >

Fulfillment Center 1 📍 - P. O. Box 9, 10289 Candlewood Way, Oregon House, California 95962 United States

Item ∨

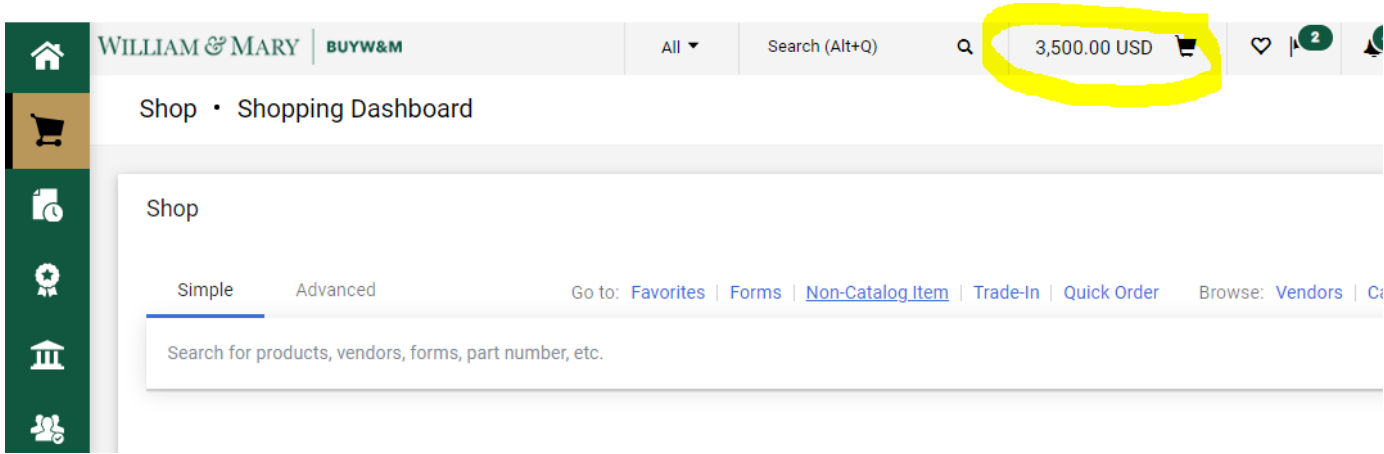
Product Description ★	Catalog No.	Quantity ★	Price Estimate	Packaging
IC Smith Translation Svcs <small>229 characters remaining</small>		1	3,500.00	EA - Each

Additional Details >

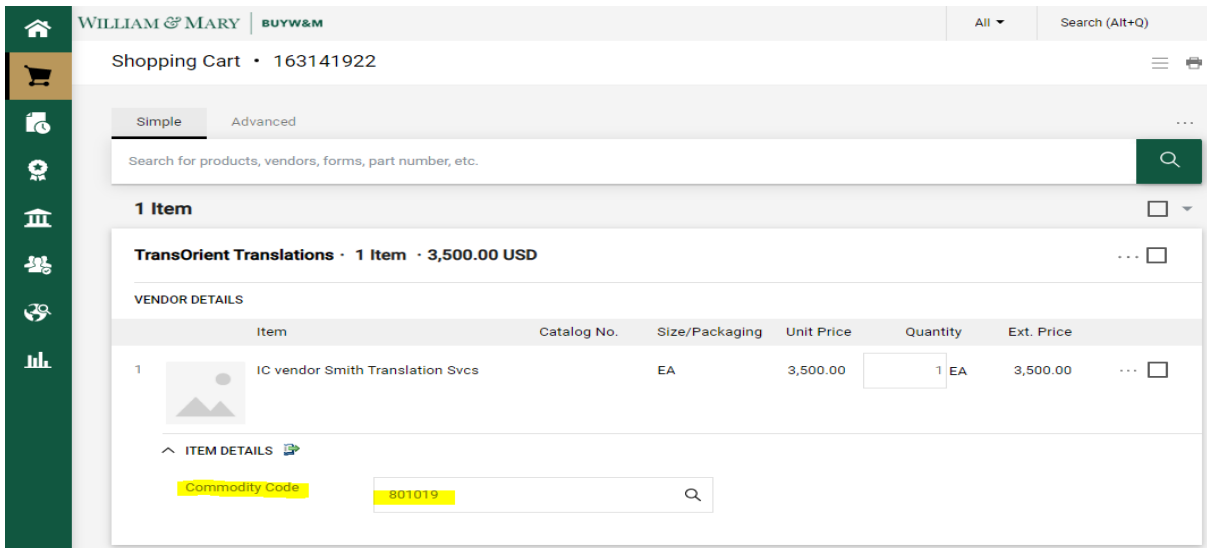
★ Required fields

Save **Save And Add Another** **Close**

3. To proceed with the requisition, select **View My Cart** in the upper right-hand corner of the screen



4. A Commodity Code is required for each item in your cart. Search for and add the appropriate Commodity Code for each item in your cart. (Example: 801019 can typically be entered for IC services)



5. Select the **Proceed to Checkout** button on the top right corner of the cart to complete required information.

WILLIAM & MARY | BUYW&M

Shopping Cart • 163141922

3,500.00 USD

Assign Cart **Proceed To Checkout**

Simple | Advanced

Search for products, vendors, forms, part number, etc.

1 Item

TransOrient Translations · 1 Item · 3,500.00 USD

VENDOR DETAILS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1		EA	3,500.00	1 EA	3,500.00

ITEM DETAILS

Commodity Code: 801019

Details

For: Kori Varner

Name: 2022-09-28 931012807 01

Total (3,500.00 USD)

Total: 3,500.00

6. Note the messages on the right-hand side about items requiring attention. To add or update information, select the pencil in the appropriate area of the requisition. Be sure to complete all fields highlighted below including the following..

- a. Under 'General', update the description (see example below)
- b. Under 'General', enter the IC assessment authorization number in the **Manual Contract Number** field (for example: 4289286E) -- This was the number referenced in the HR email confirming this vendor's status as an IC
- c. Under 'General', Procurement needs to know if the goods/services will be received in full by 6/30 of the current fiscal year. Select either Yes or No from the drop-down menu
- d. Confirm Shipping AND billing contact information

The screenshot shows a procurement requisition form for 'IC_Smith Translation Svcs' with a total value of 3,500.00 USD. The form is divided into three main sections: General, Shipping, and Billing. The 'General' section includes fields for Cart Name, Description, FAMIS work order/part number, Manual Contract Number, Prepared by, Prepared for, Department, and a question about foreign vendors. The 'Shipping' section includes Ship To, Attn, and Ship Via. The 'Billing' section includes Bill To, Attn, and Billing Options. A draft status message is visible on the right side, indicating that the requisition is in draft status and requires a validation check before proceeding. The 'Manual Contract Number' field is highlighted in yellow, as is the question about receiving goods/services in full by June 30th. The draft message is also highlighted in yellow.

Section	Field	Value
General	Cart Name	2022-09-28 931012807 01
	Description	IC_Smith Translation Svcs
	FAMIS work order/part number	no value
	Manual Contract Number	4289286E
	Prepared by	Kori Varner
	Prepared for	Kori Varner
	Department	Faculty of Arts & Sciences (FAS)
	FOREIGN VENDORS ONLY Is Payment US Source or Foreign Source Income?	no value
	Will goods/services related to this order be received in full by June 30th?	Yes
	Date of Service start date	
Shipping	Ship To	
	Attn:	Kori Varner Dean of Fac. Arts & Sci - Boswell Hall RM305 Department: Faculty of Arts & Sciences 100 Ukrop Way RM305 Williamsburg, VA 23185 United States
	Ship Via	Best Carrier-Best Way
Billing	Bill To	
	Attn:	Kori Varner W&M Dean's Ofc - Arts & Science Department: Faculty of Arts & Sciences PO Box 8795 Williamsburg, VA 23187-8795 United States
	Billing Options	

Draft
Correct these issues.
You are unable to proceed until addressed.
Required: Index
You need to Validation Check before you can proceed.
Total (3,500.00 USD)
Subtotal 3,500.00
3,500.00
What's next for my order?
Next Step: Procurement Review
Approvers: Sherfy, Feleasha Vega, William
Workflow: [Icons]

7. Click on the pencil icon in the **Accounting Codes** section and enter the accounting details for this transaction, which must include the Chart, Index and Account. For this example, we used Chart = W and Account = 712680-W for Skilled Services. Update the index number and select Save Changes.

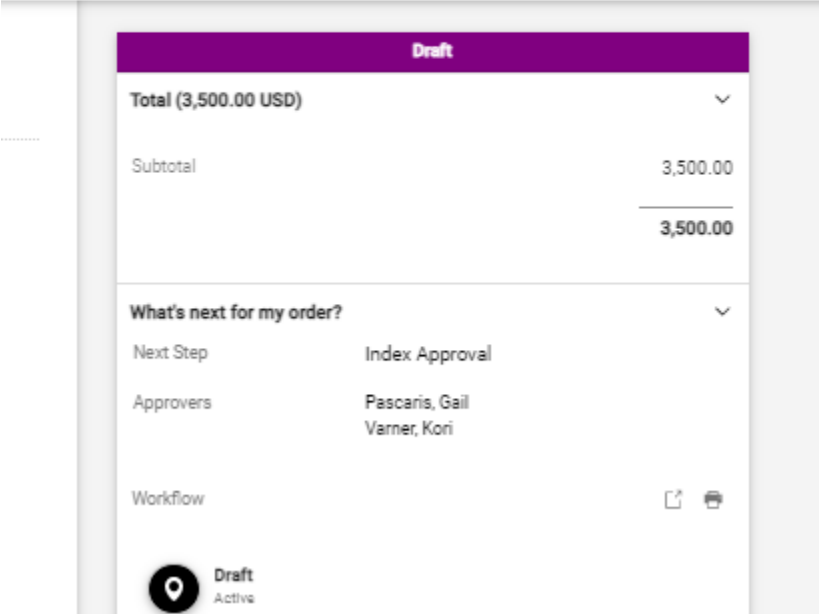
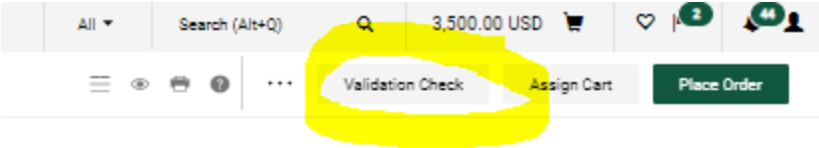
Accounting Codes			
Chart	Index	Account	Activity
W The College of William and Mary	120121-W Dean of Faculty of Arts & Sciences	712680-W Skilled Services	no value

8. Click on the pencil icon in the **Internal Notes and Attachments** section and complete the following..
- Procurement Review - Terms and Conditions: Must select 'Yes' from the drop down. This will prompt Procurement to review the drafted IC contract, and either recommend changes or approve. If approved by Procurement, the entire requisition will be returned to the administrator (as a draft) so that the IC contract can be shared with the contractor for their signature. Once the contractor returns the signed contract, the administrator should upload the signed contract in the requisition (which should still be in draft status) and resubmit to Procurement for processing. The countersigned agreement will be completed with the approval of the requisition. **Note: Procurement is the designated authority to countersign the IC agreement.**
 - Internal Attachments include the following:
 - Pdf of the HR approval email for audit purposes (IC assessment response)
 - IC agreement (initially the administrator will upload the draft version for Procurement review)
 - Any quotes or estimates provided by the contractor
 - Internal Note: See example below referencing the IC assessment number
 - Expense ID: Add the appropriate A&S naming convention here (Example: PROF_SMIT_FY23_IC SVCS)

Internal Notes and Attachments		External Notes and Attachments	
<u>Procurement Review - Terms and Conditions</u>	Yes	PO Clauses	Add
Procurement Method	no value	Note to all Vendors	no value
Procurement Method Notes	no value	Attachments for all vendors	Add
<u>Internal Attachments</u>	Add		
<u>Internal Note</u>	See attached IC agreement Draft. IC contractor assessment #4289286E		
<u>Expense ID</u>	ENTER NAMING CONVENTION HERE		

NOTE: If the contractor requests to make changes to W&M’s standard contract terms, Procurement would need to review and approve *prior* to the administrator submitting the requisition. In this case, rather than uploading the draft IC contract via buyW&M, administrators should email the draft contract - with proposed changes - directly to Sherrene Moore (svmoor@wm.edu) or Bill Vega (wavega@wm.edu) for further review.

9. Once the required data has been entered along with other desired updates, select **Validation Check** to perform a real time check of the budget in Banner.



10. Once the Validation Check is complete, select Place Order.

- You will receive confirmation that the requisition has been submitted for approval.
- Once approved, the requisition will complete the requisition workflow resulting in the creation of a Purchase Order (PO).
- Once PO is created, email a pdf copy to the contractor for their records and make them aware that they will need to provide an invoice upon completion of services, in order to receive payment. Be sure to let the contractor know who the department contact person is, as well as the appropriate email address for invoices to be sent.

11. NOTE: The contractor *must* submit an invoice to receive payment once the work has been completed. The contractor will submit their invoice directly to the department/program for payment, and the administrator will need to do the following:

- a. Request approval to process the invoice -- check with the faculty member/PI to confirm whether deliverables have been completed before processing any payments.
- b. Once approval is received, administrator will invoice against the PO in buyW&M.