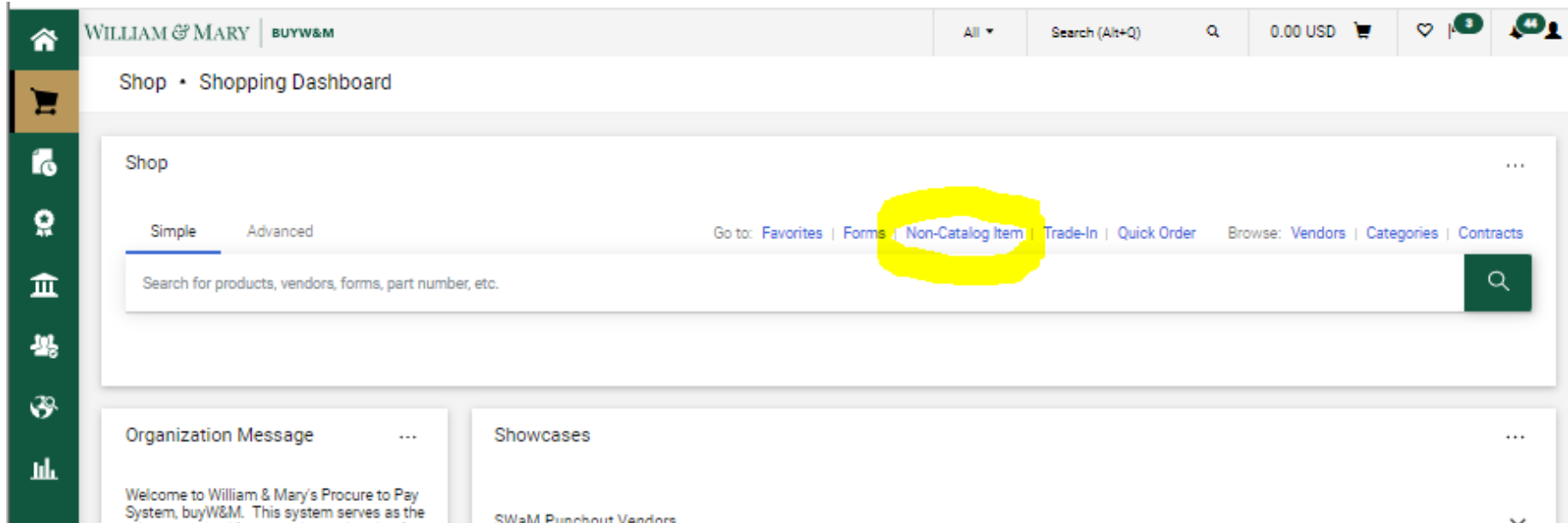# Submitting a Requisition for Independent Contractor Services

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.

3. To proceed with the requisition, select **View My Cart** in the upper right-hand corner of the screen
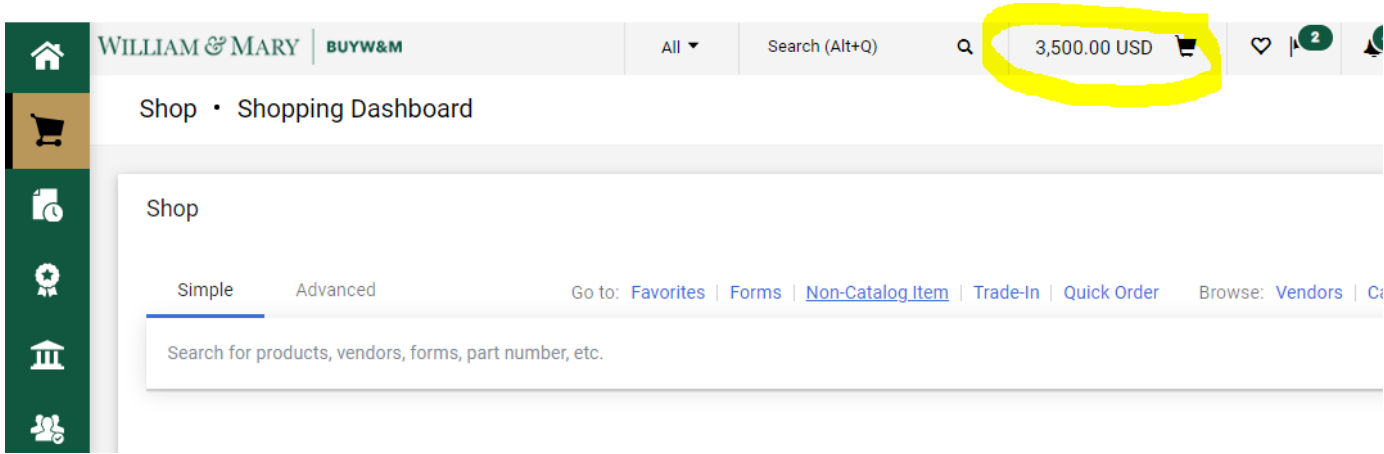
4. A Commodity Code is required for each item in your cart. Search for and add the appropriate Commodity Code for each item in your cart. (Example: 801019 can typically be entered for IC services)
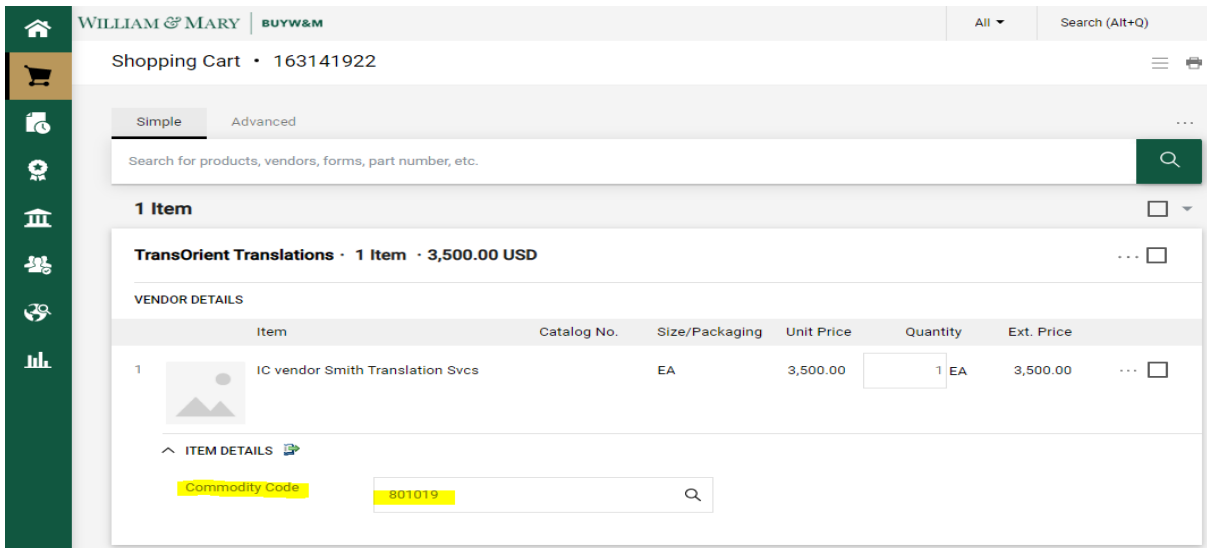
5. Select the **Proceed to Checkout** button on the top right corner of the cart to complete required information.

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

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..
   a. 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.***
   b. Internal Attachments include the following:
      i. Pdf of the HR approval email for audit purposes (IC assessment response)
      ii. IC agreement (initially the administrator will upload the draft version for Procurement review)
      iii. Any quotes or estimates provided by the contractor
   c. Internal Note: See example below referencing the IC assessment number
   d. Expense ID: Add the appropriate A&S naming convention here (Example: PROF_SMIT_FY23_IC SVCS)

Internal Notes and Attachments		External Notes and Attachments	
Procurement Review - Terms and Conditions	Yes Yes	PO Clauses	Add
Procurement Method	*no value*	Note to all Vendors	*no value*
Procurement Method Notes	*no value*	Attachments for all vendors	Add
Internal Attachments	Add		
Internal Note	See attached IC agreement Draft. IC contractor assessment #4289286E		
Expense ID	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.
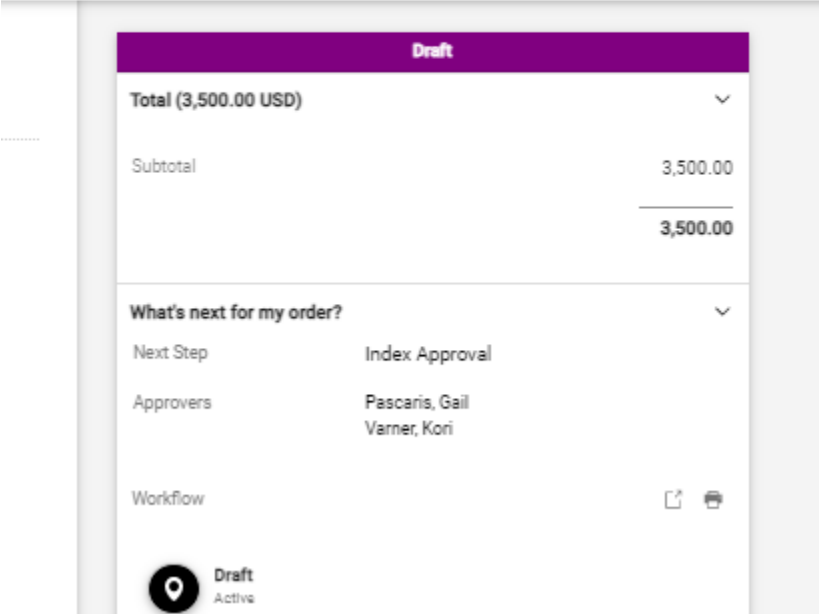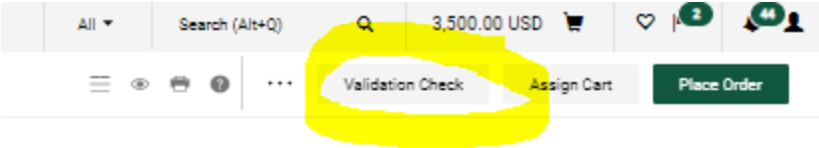
10. Once the Validation Check is complete, select Place Order.

- 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.