

Independent Contractor Agreement Contract Request

Please follow the steps below to complete and submit a contract request for an Independent Contractor Agreement. **An Independent Contractor Assessment must be approved prior to submitting this request.** If an assessment has not been completed, please do not move forward with this request and complete the assessment found here: [Independent Contractor Assessment](https://wmsas.qualtrics.com/jfe/form/SV_1HYG68DD04DZPP7) (https://wmsas.qualtrics.com/jfe/form/SV_1HYG68DD04DZPP7).

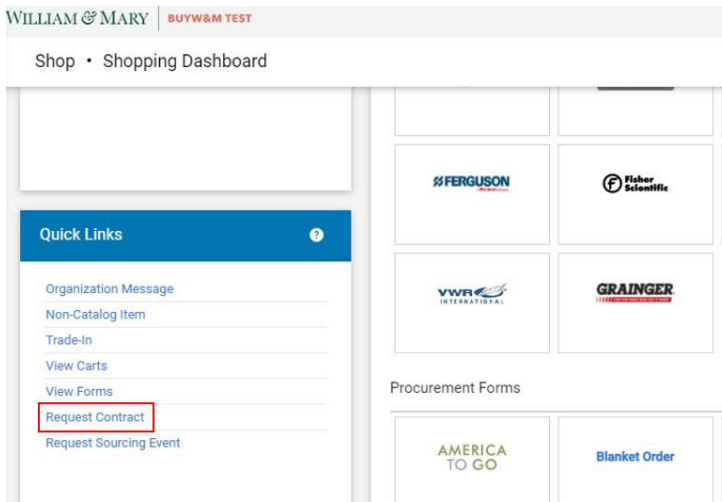
For questions related to your contract requests please submit an issue ticket found on wm.edu/buywm.

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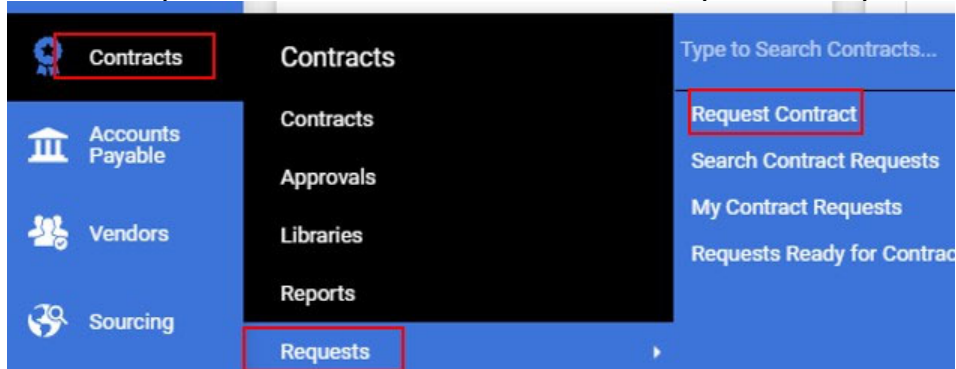
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Contract Request Completion

- From the Shopping Dashboard, locate the “Request Contract” link found under the “Quick Links” menu



- This same option can be found under Contracts -> Requests -> Request Contract



- From the pop up window, enter in the Contract Request Name (this will populate on the agreement form) and select “Independent Contractor Agreement” from the template drop down then select Submit

Create Contract Request

Contract Request Name *

Select a Contract Request Template *

3. The new request form will open on the “Instructions” screen. Once read, please select “Next” to continue.

The screenshot shows the 'Instructions' screen for a contract request. On the left is a sidebar with a menu: 'IC TEST EXAMPLE' (Form Number: 753843, Request Status: Incomplete), 'Instructions', 'Details', 'Attachments' (0), 'Questions' (checked), 'Review and Complete', 'Discussion', and 'Contract Request Workflow'. The main content area is titled 'Instructions' and contains the text: 'Please complete this request to request an Independent Contractor Agreement between William & Mary/VIMS and the contractor approved by the required Independent Contractor Assessment. If an assessment has not been completed, please do not move forward with this request and complete the assessment found here: Independent Contractor Assessment.' Below this is another instruction: 'Please attach the Independent Contractor Assessment response to this request.' At the bottom right is a blue 'Next >' button.

4. From the “Details” page, the end user will be given the option to revise the “Contract Request Name” if needed. Select “Next” to continue.

The screenshot shows the 'Details' screen for a contract request. The sidebar is similar to the previous screen, but 'Details' is selected. The main content area is titled 'Details' and contains the following information: 'Contract Request Name *' (input field with 'IC TEST EXAMPLE'), 'Template' (Independent Contractor Agreement), 'Contract Type' (Independent Contractor Agreement), and 'Description' (-). At the bottom are buttons for '< Previous', 'Save Progress', and 'Next >'.

5. Attachments – please attach the IC Assessment response as well as any other applicable documentation such as a quote on this page. Select “Next” to continue.

The screenshot shows the 'Attachments' screen for a contract request. The sidebar is similar to the previous screens, but 'Attachments' is selected and has a '0' next to it. The main content area is titled 'Attachments' and contains a blue 'Add Attachments' button and a text label 'Add Attachments:'. At the bottom are buttons for '< Previous' and 'Next >'.

6. The “Questions” page is broken out into multiple sections, which all correlate to the Speaker Agreement contract form.
 - a. Independent Contractor Agreement
 - b. Scope of Work
 - c. Reporting

Each section will contain required fields which are indicated by an * and some which can be left blank due to being optional or not applicable to the request.

7. Independent Contractor Agreement:

- a. Requester’s Name (required) – the name of the person submitting the request
- b. Requester’s Email (required) – email of requester
- c. Requester’s Phone (required) – phone number of requester
- d. Department (required) – If department is not listed please put in a buyW&M ticket to request the department to be added (<https://go.wm.edu/V5GyX2>)
- e. IC Assessment Number (required) – ID number generated from the Independent Contractor Assessment (https://wmsas.qualtrics.com/jfe/form/SV_1HYG68DD04DZPP7)
- f. Contractor Name (required) – speaker/presenter/performer associated with the request. Please note that the contractor must be approved and active in buyW&M prior to the request submittal. If not in buyW&M, please submit a vendor request to have this contractor added (reference user guide: [Vendor Request Guide](#))
- g. Additional Second Parties (**IGNORE**) – this cannot be removed from the request as it is a system generated field that is tied to the “Contractor Name” field. ****PLEASE IGNORE****
- h. Background Check (required) – Select “Yes” if a background check is required for this engagement

▼ Independent Contractor Agreement

Requester's Name *

Requester's Email *

Requester's Phone *

Department *

IC Assessment Number * ⓘ

Contractor Name * ⓘ

Additional Second Parties ⓘ

Background Check? *

Yes No

8. Scope of Work:

- a. Deliverables (required) – enter the desired end result(s)
- b. Specific Objectives (required) – If multiple steps, please enter in chronological order
- c. Start Date (required) – the date the contractor will begin
- d. End Date (required) – the date the engagement will conclude

Scope of Work

IC - Deliverables *

age, excessive use
and lack of
maintenance to
some degree.

1888 characters remaining

IC - Specific Objectives * ?

cosmetic
improvement and
touch up 13.
Transportation

1323 characters remaining

Start Date * ?

mm/dd/yyyy
📅

Update Start Date Upon Execution ?

End Date * ?

mm/dd/yyyy
📅

- e. Auto-Renew (**IGNORE**) – this cannot be removed from the request as it is a system generated field that is tied to the two date fields. These could be potentially be used in the contracts module by the responsible Senior Sourcing Specialist for tracking purposes
****PLEASE IGNORE****
- f. Renewal Term (**IGNORE**) – this cannot be removed from the request as it is a system generated field that is tied to the two date fields. These could be potentially be used in the contracts module by the responsible Senior Sourcing Specialist for tracking purposes
****PLEASE IGNORE****
- g. Renewals Remaining (**IGNORE**) – this cannot be removed from the request as it is a system generated field that is tied to the two date fields. These could be potentially be used in the contracts module by the responsible Senior Sourcing Specialist for tracking purposes
****PLEASE IGNORE****

Auto-Renew

Yes No

Renewal Term

▲
▼

▼

Renewals Remaining

▲
▼

- h. Total Compensation Breakdown or Not to Exceed? – select between whether the compensation

will require a break down between travel, service and other

Total Compensation Breakdown or Not to Exceed? *

- Total Compensation Breakdown
- Not to Exceed

Total Compensation Breakdown

Travel Compensation (\$) *

Service Compensation (\$) *

Other Expense (\$) *

Total Compensation (\$) *

or a flat not to exceed value

Total Compensation Breakdown or Not to Exceed? *

- Total Compensation Breakdown
- Not to Exceed

Not to Exceed

Not to Exceed (\$) *

9. Reporting:

If the contractor is required to submit reports please enter in the details in the fields under this section. If the contractor is not required to submit any reports, then enter N/A.

Reporting

IC Reports sent to *

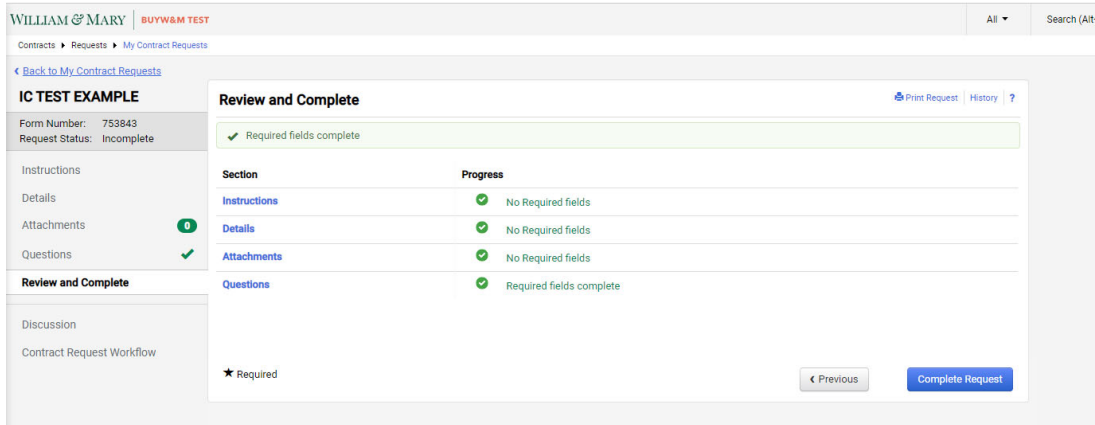
IC Reporting Dates *

- Weekly
- Bi-Weekly
- Monthly
- Quarterly
- Other
- N/A

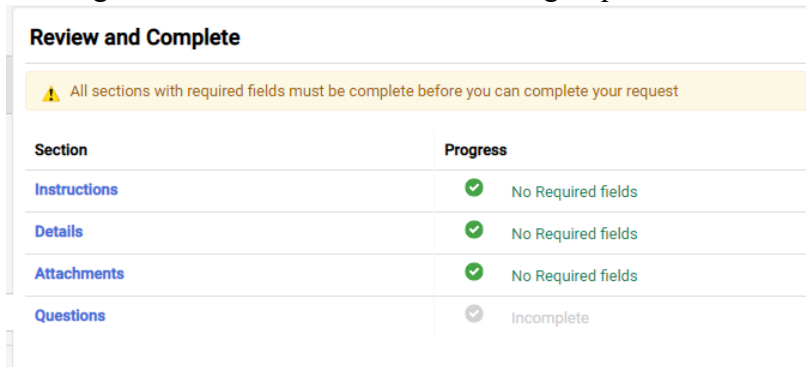
Description of Reports *

2000 characters remaining

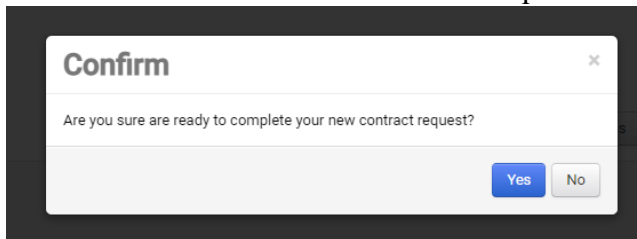
10. Once all questions have been answered, select Next to continue to the “Review and Complete” section. If all items have a green check box then select “Complete Request”



If there is a warning at the top of the “Review and Complete” page, please go to the section not marked with a green check and address the missing required information

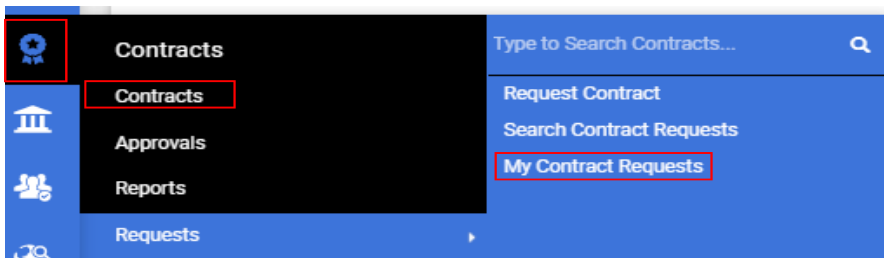


11. Select Yes to confirm and submit the request



Contract Request Tracking and Approvals

All contract requests are trackable by the end user to determine where in the approval process the request resides by navigating Contracts -> Requests -> My Contract Requests



A listing of all contract requests will show with their current status, workflow step and dates. To access a

request to review, select the request name to open.

My Contract Requests

> Filter Contract Requests Create New Contract Request

1-7 of 7 Results 10 Per Page

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
ICA TEST 051421	Independent Contractor Agreement	John Dixon (TEST SHOPPER)	Completed	-	-	5/14/2021 2:31 PM	5/14/2021 2:04 PM	Actions
Myers Knife	Speaker/Presenter/Performing Artist Agreement	John Dixon (TEST SHOPPER)	Under Review	Sourcing Specialist Approval	-	11/5/2021 4:15 PM	11/5/2021 4:08 PM	Actions
Mike Myers Agreement	Speaker/Presenter/Performing Artist Agreement	John Dixon (TEST SHOPPER)	Incomplete	-	-	11/5/2021 4:44 PM	11/5/2021 4:44 PM	Actions
Vescent Photonics Sole Source	Sole Source	John Dixon (TEST SHOPPER)	Completed	-	-	9/9/2021 2:47 PM	9/9/2021 2:37 PM	Actions
Vescent Photonics Sole Source	Sole Source	John Dixon (TEST SHOPPER)	Completed	-	-	9/9/2021 3:08 PM	9/9/2021 2:59 PM	Actions
Vescent Photonics Sole Source TEST	Sole Source	John Dixon (TEST SHOPPER)	Under Review	Department Approval	-	9/9/2021 4:32 PM	9/9/2021 4:29 PM	Actions
John Doe Speaker 110821	Speaker/Presenter/Performing Artist Agreement	John Dixon (TEST SHOPPER)	Under Review	Sourcing Specialist Approval	-	11/8/2021 1:44 PM	11/8/2021 1:38 PM	Actions

1-7 of 7 Results 10 Per Page

1. Once the request is open, select “Contract Request Workflow” from the left menu to view the request’s current workflow step

IC Test 1

Form Number: 749254
Request Status: Completed
Contract: WM-ICA-CHEM-0090-2023

Instructions

Details

Attachments 0


Questions ✓

Discussion

Contract Request Workflow

Show skipped steps

Orientation Horizontal





2. The requester will receive a notification email once the contract has been generated and both parties have signed (Contractor and Procurement) with a copy of the signed agreement.

Completed: Signature request on Contract IC TEST EXAMPLE

DocuSign Demo System <dse_demo@docusign.net>
To: Dixon, John

IC TEST EXAMPLE.pdf
290 KB





Your document has been completed

VIEW COMPLETED DOCUMENT

buy@WM demo
buywm-demo@wm.edu

3. Once the agreement is signed, please download and attach to the **blanket order requisition** in buyW&M.