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).

For questions related to your contract requests please submit an issue ticket found on [wm.edu/buywm](http://wm.edu/buywm).

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Contract Request Completion

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

   ![Dashboard Screenshot](image)

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

2. 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
3. The new request form will open on the “Instructions” screen. Once read, please select “Next” to continue.

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.

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.
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
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

   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**

   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
- [x] Not to Exceed

**Total Compensation Breakdown**

Travel Compensation ($)

- [ ] 300.00

Service Compensation ($)

- [ ] 1,500.00

Other Expense ($)

- [ ] 250.00

Total Compensation ($)

- [ ] 2,050.00

or a flat not to exceed value

Total Compensation Breakdown or Not to Exceed? *

- [ ] Total Compensation Breakdown
- [x] Not to Exceed

**Not to Exceed**

Not to Exceed ($)

- [ ] 2,050.00

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 *

2,000 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.

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

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.

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