Speaker/Presenter/Performing Artist Agreement Contract Request

Please follow the steps below to complete and submit a contract request for a Speaker, Presenter, or Performing Artist. For questions related to your contract requests please submit an issue ticket found on wm.edu/buywm.

A video for this process can also be found: https://www.youtube.com/watch?v=LtZCcHeBHSs&feature=youtu.be

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Contract Request Completion

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

   ![Quick Links Menu]

   - 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 “Speaker/Presenter/Performing Artist 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 are not required, but if there is an estimate, quote, or a document that is associated with this request please upload 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.
   - Contractor Information
   - Engagement
   - Compensation
   - Contractor’s Responsibilities
   - Additional Requirements

   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. **Contractor Information:**
   - Requester’s Name (required) – the name of the person submitting the request
   - Requester’s Email (required) – email of requester
   - Requester’s Phone (required) – phone number of requester
   - 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)
   - 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**
   - Agreement Date (required) – the date on which the agreement is made
• W&M department/group hosting or sponsoring Contractor (required) – choose the department associated with this request. If the department is not listed, please contact a buyW&M Administrator to have the department loaded.

8. **Engagement:**

• Name and Address of Place of Engagement (required) – the name and address of the premises where the engagement will take place
• Start Date (required) – the date the engagement will begin
• End Date (required) – the date the engagement will conclude
• 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**
• 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**
• 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**
• Start and Finish Times of Engagement (optional) – if the engagement has agreed upon starting and ending times, please include in this field
• Summary of Engagement / Services Provided (required) – a description of the engagement / services
9. **Compensation:**
   - Total Compensation (required) – the sum of both the service fee and travel (if applicable)
   - Compensation Options (required) – select the option that applies to this engagement. If there are questions or need more information please select the **?** to open the help text and link to the Travel Policy.
   - Service Compensation (required) – the fee the contractor will be charging (minus travel) for the engagement
   - Travel Compensation (required) – enter in the cost for travel if applicable for the engagement. If no travel is included or if included in the Service fee then enter in 0.00.
10. **Contractor’s Responsibilities:**

- Contractor consists of the following individual(s) (required) – enter in the name(s) of all applicable contractors associated with the engagement.
- Contractor will provide the following equipment for the Engagement (optional) – list any equipment the contractor will provide if applicable
- W&M will provide the following equipment and technical needs for the Engagement (optional) – list any equipment W&M will provide if applicable

11. **Additional Requirements (select Yes or No):**

- Background Check? (required) – Select “Yes” if a background check is required for this engagement
- Insurance? (required) – If “Yes”, the Contractor must have valid insurance in effect at the time of the performance. W&M requires a certificate of insurance with minimum liability limits of $1,000,000.00:
  i. The University must be named as an additional insured and so endorsed on the policy.
  ii. Certificate must be issued in advance of the date of the event(s) and show specific event(s) and date(s).
  iii. The Certificate must indicate that, at a minimum, general liability coverage, workers compensation coverage, and employers liability coverage are carried.
- Parking? (required) - Vendors/Contractors requiring access to a parking space for more than an hour at a time are required to purchase parking credentials on a daily, monthly or annual basis. For current policies, exceptions and pricing go to:
12. Select “Next” to continue to the “Review and Complete” section
13. Once all required fields have been completed and the end user feels all questions are answered correctly, select “Complete Request” to enter the request into the approval workflow.

- If there are required fields that have not been completed the system will not allow for the request to be completed. A warning error will show, the checkmark next to “Questions” will not be green, and the “Complete Request” button will not be selectable. Return to the “Questions” page and address any missing information then return to the “Review and Complete” page to submit.
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.

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

Select “View approvers” to see who is currently in the approval step for contact information.
Contract Request Notifications

The following email notifications will be received throughout the process. The end user can manage these notifications by going into their profile and selecting “Notification Preferences -> Contracts”. From here the various notifications can be edited to meet the end user’s needs.

To determine the type of notification focus on the subject line of the email:
• Request – Pending Approval: the request has been submitted into the workflow and has yet to be approved.

• Request – Approval: the request has been approved and moved to the next step in the approval workflow.

• Request – Completed: the request has completed the workflow and is currently in contract creation. This is where the agreement is generated by the responsible Sourcing Specialist.
• Contract – sent to the eSignature Application: the agreement has been generated and has been sent to the contractor to be signed via DocuSign

• Contract - Competed and Executed – the agreement has been signed and now the contract is executed. This is the last step in the generation of the Speaker Agreement. From here the end user can locate the agreement via the steps below to upload to their invoice payment request.

To view the contract and download the agreement, Click on the “View Contract” button in the email or from your notifications in buyW&M
From the summary screen, select “Attachments”

Select “Full Contract PDF” to download the signed Speaker Agreement to attach to the direct payment request submital.
Contract Request Approval and Contract Creation – Procurement Action

These steps will be accomplished by the Senior Sourcing Specialist who is assigned to the requester’s department. Complete the steps below to approve the contract request, create the Speaker Agreement and submit for signature.

1. Once the Request has been submitted, the department’s associated Sourcing Specialist will receive an action notification to approve.

2. After assigning the approval, open the request for review and approval. Select the “Approve/Complete” action from the “From Request Actions” drop down.

3. The Request will then flow to “Contract Creation”. This step is where the Sourcing Specialist will approve and generate the Speaker Agreement in the Contracts module. Approve via the same steps above.
4. Once approved, the “Request Actions” button will appear to allow for contract creation.

5. Select “Request Actions” then “Create Contract”.

6. The “Create Contract” pop up window will appear. Complete the required (*) fields and select “Speaker/PresenterPerforming Artist/Contractor Agreement” from the “Main Document Template” dropdown. Select “Create Contract”.

   * It has been agreed on that the “Contract Name” should mirror what is listed as the Contract Request title.
7. From the Draft contract page, complete the “Final End Date” to reflect what is in the “Renewal Date” field.

8. Select “Attachments” from the side menu and download the agreement to ensure all the fields are populated correctly. If any changes are made be sure to check out and check in the document to apply the edits.
9. Select “eSignature” from the side menu to set up the signature process

10. Select “Add Signer”
11. Select the contractors name from the “Contract Party” drop down then select the “Primary Remittance” contact from the drop down. Once all are applied, select “Save Changes”

12. Lastly, select “Submit for Approval” from the side menu and select “Submit for Approval” button
13. After the contractor signs, the contract status will change to “Executed”