Online Service Agreements
Training Instructions

The online service agreements application will be housed in VandalWeb under the Employee Information menu. Note: all employees will have access to the application.

Once you enter the main menu, you will have three options available to you: 1) Create a contract; 2) Approve a contract; and 3) Search for a contract.

To create a contract, please click on the **Purchasing Service Contract Entry** link.
To create a contract, individuals will be prompted to answer the IRS independent contractor vs. employee checklist prior to creating a contract. The questions are “yes or no” and must be answered each time you create a contract – no exceptions.

The questions must be answered correctly. Incorrect answers will result in the system locking you out of your current session and will direct you to contact Human Resources for a review and determination regarding whether or not your project should be classified as an employment engagement or independent contractor.

To provide answers for the questions simply click on the drop down boxes and select yes or no as it pertains to your situation.
Upon answering your questions, you will need to click a box affirming the answers you’ve provided are, to the best of your knowledge, accurate and correct. After you check the box and click submit you are ready to move forward.

Each contract will be numbered by the system and the creation of a contract will require several items. Please click on the Edit Departmental information link to begin:

To begin, please select the appropriate contract type. If your contract type is not found, please select “Other Party's Agreement” and upload your contract.
After selecting your agreement type, please enter your department from the drop down menu.

After selecting your department, please enter your phone, fax, and budget numbers in the appropriate boxes. **NOTE: If you are using grant or federal funds for any portion of the contract, list only the Grant or Federal Funds Budget.**

After entering your budget information, please click the drop down box to indicate whether or not a conflict of interest may exist. If a potential conflict exists it must be handled in accordance with the current university conflict of interest policies and procedures.

Once you have completed the conflict of interest check, you are ready to *Save and Continue* onto the next section.
After completing the department information, users will need to enter Contractor Information. All contractor information, including proof of insurance, must be completed. Failure to provide contractor information will result in you being unable to submit your contract for approval.

To enter the contractor information, begin by providing their Banner ID. If the contractors Banner ID is unavailable, please provide the contractor’s legal name. After you provide the contractor’s name, please enter the name of your contact person, their title, phone, fax, mailing address (including city, state, and zip), and their email address. **NOTE: YOU MUST PROVIDE AN EMAIL ADDRESS.** After you've completed the contractor's information you will be required to upload the contractor's proof of insurance. In the event you have been given a waiver of the insurance requirements by Risk Management, please upload a copy of your waiver in .pdf format.

After you’ve completed the insurance information, you will be asked whether or not you’ve requested and submitted a copy of the vendor’s W8/W9 to Accounts Payable. **NOTE: THIS IS NOT A REQUIRED DOCUMENT, JUST A REMINDER TO OBTAIN A COPY OF THE W8/W9 FORM AND SUBMIT IT TO ACCOUNTS PAYABLE PRIOR TO PROCESSING YOUR CLAIM VOUCHER FOR PAYMENT.**
After you’ve answered your question about the W8/W9 you are ready to move onto the contract information by clicking on the Save and Continue link.

After completing the Contractor Information you are now ready to input your Contract Information. All contract information must be completed. Failure to provide the contract information will result in you being unable to submit your contract for approval.

To enter the contract information begin, by selecting the appropriate dates from the drop down calendars. **NOTE: YOU MUST CHOOSE DATES THAT MATCH THE FISCAL YEAR YOU SELECTED FOR YOUR CONTRACT.**

After selecting your contract dates you will be required to enter the cost of the contract. Please use whole numbers only and do not include $, decimal points or commas. **NOTE: THE DOLLAR AMOUNT YOU SELECT MUST MATCH THE CONTRACT TYPE YOU SELECTED. IF THEY DO NOT MATCH YOU CANNOT SUBMIT YOUR CONTRACT FOR APPROVAL.**

After entering the cost of your contract, you will be asked for the consideration. **NOTE: UI SHOULD ALWAYS BE PAYING THE OTHER PARTY. IF THE OTHER PARTY IS PAYING UI PLEASE CONTACT THE OFFICE OF SPONSORED PROGRAMS.**

After selecting your consideration you will be asked to provide a scope of work. This can be done by attaching a Word or .pdf copy of the scope of work document.
After completing your scope of work you will be asked if there are special considerations for the contract. This can consist of notes for your approvers, notes to the Contracts & Purchasing Department, or anything else you deem special.

After entering any special considerations, you are ready to *Save and Continue* and enter in your approver(s) information.

After completing the *Contract Information*, you will be able to select up to three levels of departmental/unit approval. To enter your approver(s) please provide either the V number or User Name for whomever is responsible for approvals in
your area. At a minimum, you should include your Fiscal Officer and anyone else
your department or unit may require.

In addition to your department and unit approvals, all contracts will be reviewed
and approved by Contracts & Purchasing Services. All contracts utilizing grant
funds will also be reviewed and approved by the Office of Sponsored Programs.

Once the approvers have been entered you are ready to **Save and Continue** and the
contract is ready to be submitted for approval.
Once the contract has been submitted for approval you can track the status of your contract by clicking on the **Purchasing Service Contract Entry** link on the main menu.

### Purchasing Service Contract

<table>
<thead>
<tr>
<th>Contract Number</th>
<th>Fiscal Year Activity</th>
<th>Status</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY15-00001</td>
<td>2015</td>
<td>28-May-2015</td>
<td>Incomplete</td>
</tr>
<tr>
<td>FY15-00002</td>
<td>2015</td>
<td>20-May-2015</td>
<td>Purchasing Approval Queue</td>
</tr>
<tr>
<td>FY16-00001</td>
<td>2016</td>
<td>21-May-2015</td>
<td>Pending Fiscal Officer or Department Approval</td>
</tr>
<tr>
<td>FY16-00002</td>
<td>2016</td>
<td>27-May-2015</td>
<td>Purchasing Approval Queue</td>
</tr>
</tbody>
</table>

### Contractor vs Employee questions

All user answers match correct values. View these questions

### Approvals

<table>
<thead>
<tr>
<th>Queue</th>
<th>Approver Name</th>
<th>Approval Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Officer</td>
<td>Vanderbos, Douglas M.</td>
<td>27-May-2015 01:53:28PM</td>
<td>Not Approved</td>
</tr>
<tr>
<td>Purchasing Approval Queue</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Once the contract has been approved at all levels, the system will generate the appropriate contract and automatically send it to the vendor for signature.

The vendor will receive the contract via email and will be requested to review, sign, and return the agreement to Contracts and Purchasing Services.

Once the contract has been fully executed by Contracts and Purchasing the originating department and contractor will be emailed a copy of the completed contract.

After you’ve received a fully executed copy of the agreement you can initiate a claim voucher process for payment as agreed in your contract.

Contracts and Purchasing will also upload a copy of the completed agreement to the university imaging database.
APPROVALS

Approvers will be notified via an email from purchasing@uidaho.edu if a contract has been submitted for their approval.

Approvers will need to log into Vandal Web and access their approval queue on the Purchasing Services Contract Menu.
After clicking on the Purchasing Service Contract Approval link you will be presented with a list of contracts requiring your approval. To approve the contract please click on the Pending Your Approval link. The link will take you to a summary of the contract that you can review.

After reviewing the contract summary you can scroll to the bottom of the summary and either approve or disapprove the agreement. If you disapprove the agreement please provide specific reasons/feedback for your disapproval so your end users are aware of what corrections are required for approval. Corrections/Revisions must be completed by the original contract preparer.
SEARCHING FOR A CONTRACT

All users will need to log into Vandal Web and access *Purchasing Services Contract Menu* to search for a contract.

To search for a contract click on the *Search For A Contract* link and enter the appropriate search criteria.
For example, a search by user name will generate a list of all contracts created by that particular user.

If you have any questions about how to use the service agreements application or you encounter any problems please contact us at purchasing@uidaho.edu or by phone at 885-6116.