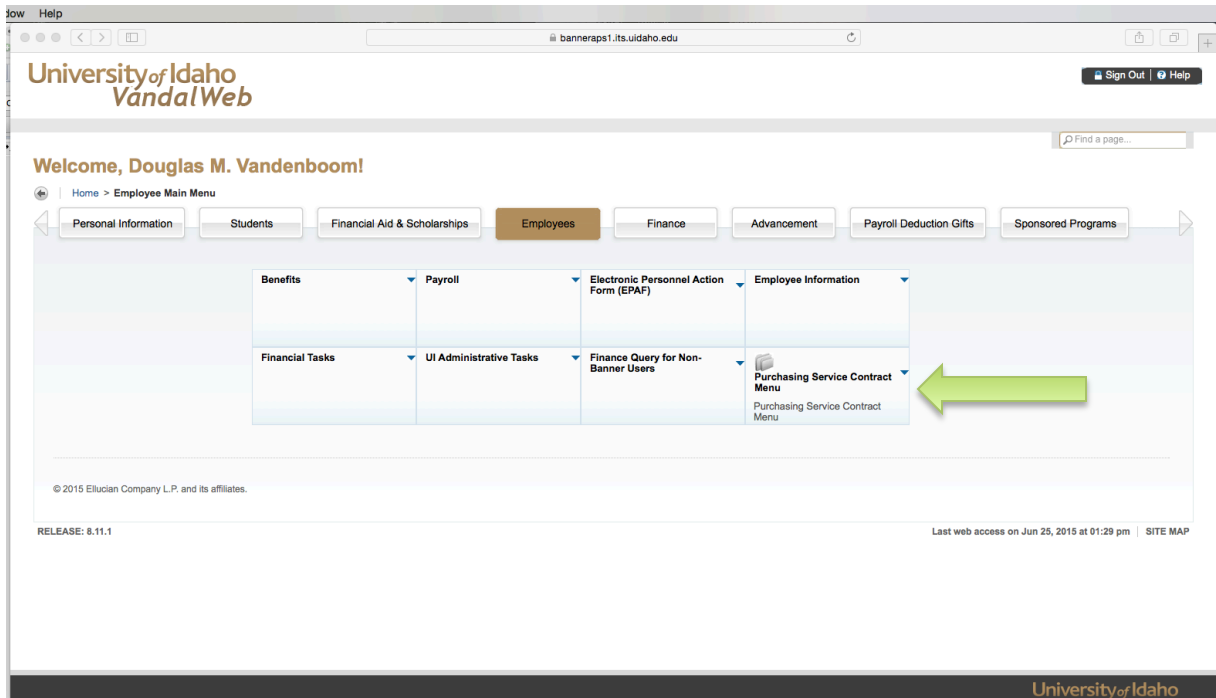


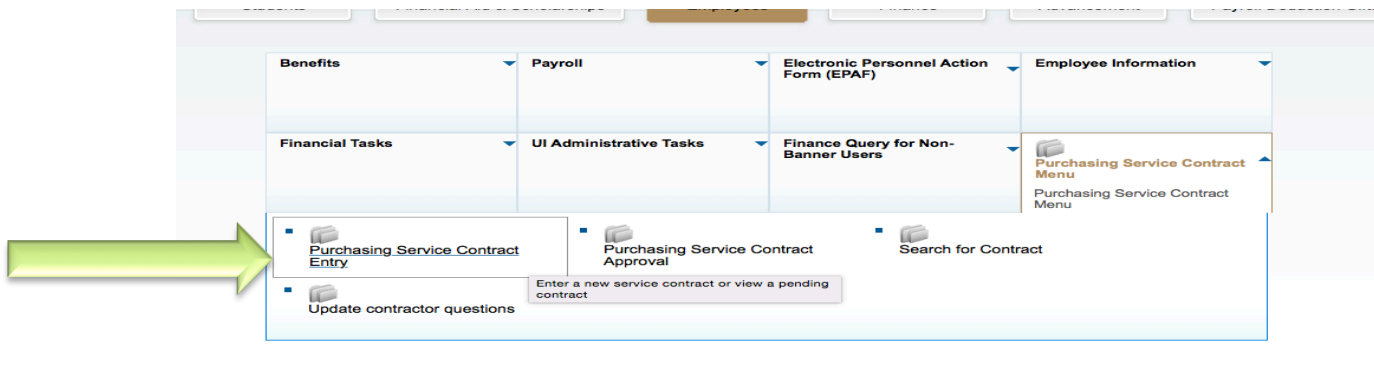
Online Service Agreements Training Instructions

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.

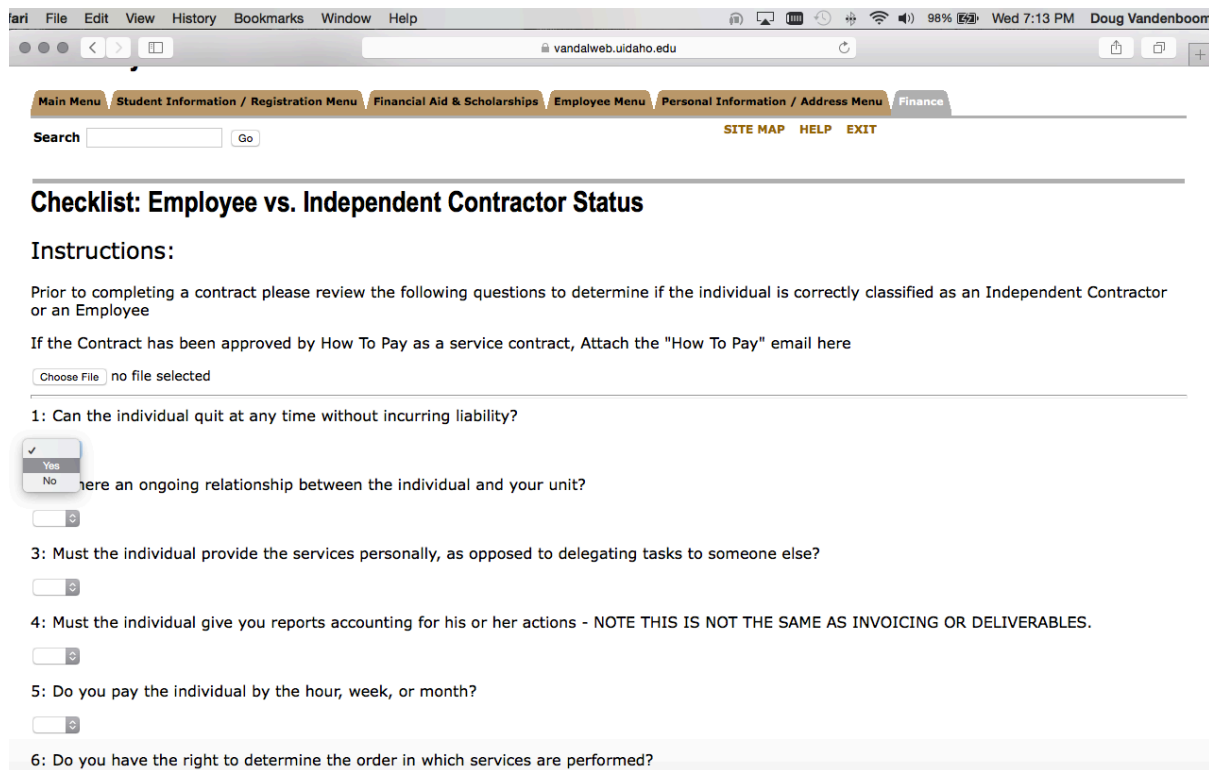
To create a contract, please click on the **Purchasing Service Contract Entry** link.



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.



afari File Edit View History Bookmarks Window Help 98% Wed 7:13 PM Doug Vandenboorn

vandalweb.uidaho.edu

Main Menu Student Information / Registration Menu Financial Aid & Scholarships Employee Menu Personal Information / Address Menu Finance

Search Go SITE MAP HELP EXIT

Checklist: Employee vs. Independent Contractor Status

Instructions:

Prior to completing a contract please review the following questions to determine if the individual is correctly classified as an Independent Contractor or an Employee

If the Contract has been approved by How To Pay as a service contract, Attach the "How To Pay" email here

no file selected

1: Can the individual quit at any time without incurring liability?

Yes
 No

2: Is there an ongoing relationship between the individual and your unit?

Yes
 No

3: Must the individual provide the services personally, as opposed to delegating tasks to someone else?

Yes
 No

4: Must the individual give you reports accounting for his or her actions - NOTE THIS IS NOT THE SAME AS INVOICING OR DELIVERABLES.

Yes
 No

5: Do you pay the individual by the hour, week, or month?

Yes
 No

6: Do you have the right to determine the order in which services are performed?

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.

No

16: Aside from the money earned on the project, can the individual make a profit or suffer a loss as a result of the work?

Yes

17: Does the individual work for more than one company at a time?

Yes

18: Do you train the individual to do the job in a particular way?

No

19: Can the individual quit at any time without incurring liability?

No

By checking this box, you affirm that you have reviewed the contract for its content; that any deviations from standard form language have been reviewed with and approved by Contracts and Purchasing; and that the information on this Contract Approval Document is correct.

Submit

PSC Menu

[Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Availability | General Ledger/Fund Balance | Incomplete Documents Query | DOAR Report]

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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:

Contract Type	No Form Type Chosen
UI Department, Program or Project	No Department Selected
Source of Funds (budget)	Not entered
Department Contact	Not entered
Contact Information	Phone: Fax: Email:
Does a University employee have a personal or financial relationship with this Vendor?	

[Edit Department Information](#)

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.

University of Idaho VandalWeb

Main Menu Student Information / Registration Menu Financial Aid & Scholarships Employee Menu Personal Information / Address Menu Finance

Search Go

SITE MAP HELP EXIT

FY15-00002

Contract Type	<input type="radio"/> Short Form Service Agreement <input type="radio"/> Long Form Service Agreement <input type="radio"/> Other Party's Agreement <input type="radio"/> Facilities Use Agreement	Please attach Other Party Form if applicable <input type="button" value="Choose File"/> no file selected
UI Department, Program or Project	<input type="text"/>	
Department Contact	<input type="text" value="V00766542"/>	Vandenboom, Douglas M.
Contact Phone Number	<input type="text"/>	
Contact Fax Number	<input type="text"/>	
Contact Email Address	<input type="text" value="doug@uidaho.edu"/>	
Source of Funds	<input type="text"/>	
Conflict of Interest	Does a University employee have a personal or financial relationship with this Vendor? <input type="text"/>	

PSC Menu

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.

University of Idaho VandalWeb

Main Menu Student Information / Registration Menu Financial Aid & Scholarships Employee Menu Personal Information / Address Menu Finance

Search Go SITE MAP HELP EXIT

FY15-00002

Contract Type Short Form Service Agreement Long Form Service Agreement Other Party's Agreement Facilities Use Agreement

Please attach Other Party Form if applicable no file selected

UI Department, Program or Project

Department Contact Vandenboom, Douglas M.

Contact Phone Number

Contact Fax Number

Contact Email Address

Source of Funds

Conflict of Interest

PSC Menu

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 contractor's 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.

The screenshot shows a web browser window with the URL `vandalweb.uidaho.edu`. The page title is "Data Updated". Below the title, the form is for "FY15-00002". The form fields are as follows:

Other Party (Banner ID)	FISSCI
LEGAL name of the other party (if not in Banner)	Fisher Scientific
Liaison	Joe Smith
Liaison Title	Lead Consultant
Phone Number of Other Party	888-888-8888
fax Number of Other Party	999-999-9999
Address of Other Party	Line 1: 1234 Consultant Drive Line 2: Suite 1000 City: Beverly Hills State: California (CA) Zip Code: 90210
Email address of Other Party	purchasing@uidaho.ed
Do you have Contractor Proof of Insurance?	<input checked="" type="radio"/> Yes <input type="radio"/> No
W-9/W-8 Received and Sent to Accounts Payable:	<input checked="" type="radio"/> Yes

Below the form, there are three buttons: "Save and Continue", "Back", and "Back to Summary". A green arrow points to the "Save and Continue" button. To the right of the form, there is a message: "Please attach Proof of Insurance or Insurance Waiver" with a "Choose File" button and a file named "Fake Insurance Cert.pdf". At the bottom left of the form area, there is a "PSC Menu" 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.

The screenshot shows a web browser window with the URL `vandalweb.uidaho.edu`. The page title is "University of Idaho VandalWeb". The navigation menu includes "Main Menu", "Student Information / Registration Menu", "Financial Aid & Scholarships", "Employee Menu", "Personal Information / Address Menu", and "Finance". A search bar is present with a "Go" button. The page displays the following information:

- Image uploaded.
- Data updated
- FY15-00002
- Contract Term: Begin Date: 01-Jul-2015, End Date: 30-Jun-2016
- Contract Cost: 9999
- Consideration: UI is paying the other party OR UI is receiving income or other consideration from the other party
- Description of Services To Be Provided: UI is PAYING the Other Party (dropdown), Fees are inclusive of travel and expenses
- Renewal of Expiring Contract: Previous Contract Number: (input field)
- Special Requirements: (text area)

At the bottom, there are buttons for "Save and Continue", "Back", and "Back to Summary". A green arrow points to the "Save and Continue" button. The "OR attach file" section shows "Choose File" and "no file selected".

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.

University of Idaho VandalWeb

Main Menu Student Information / Registration Menu Financial Aid & Scholarships Employee Menu Personal Information / Address Menu Finance

Search Go SITE MAP HELP EXIT

FY15-00002

If the Contract has been approved by How To Pay as a service contract, Attach the "How To Pay" email here:
 no file selected

Enter either V-Number or Banner User ID

Fiscal Officer

Additional Approver

Additional Approver

PSC Menu

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.

expenses

No previous contract specified

Renewal of Expiring Contract

Special Requirements

[Edit Contract Details](#)

Contractor vs Employee questions

All user answers match correct values [View these questions](#)


Approvals

Queue	Approver Name	Approval Date
<input type="text" value="Fiscal Officer"/>	Vandenboom, Douglas M.	Not approved

Select/Change Fiscal Administrator

PSC Menu

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.



University of Idaho VandalWeb

Main Menu Student Information / Registration Menu Financial Aid & Scholarships Employee Menu Personal Information / Address Menu Finance

Search Go SITE MAP HELP EXIT

Purchasing Service Contract

Create a Service Contract

Show Complete Contracts

Contract Number	Fiscal Year	Activity	Status	Department
FY15-00001	2015	20-May-2015	Incomplete	
FY15-00002	2015	20-May-2015	Purchasing Approval Queue	
FY16-00001	2016	21-May-2015	Pending Fiscal Officer or Department Approval	
FY16-00002	2016	27-May-2015	Purchasing Approval Queue	

PSC Menu

[Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Availability | General Ledger/Fund Balance | Incomplete Documents Query | DOAR Report]

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If you would like more approval detail, such as time and date stamps, you can click on the contract number and scroll to the bottom of the summary screen.


Description of Services to be Provided	Renewal of the former contract for a period
Renewal of Expiring Contract	No previous contract specified
Special Requirements	None.

Contractor vs Employee questions

All user answers match correct values [View these questions](#)

Approvals

Queue	Approver Name	Approval Date
Fiscal Officer	Vandenboom, Douglas M.	27-May-2015 01:53:28PM
Purchasing Approval Queue		Not Approved



PSC Menu

[Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Availability | General Ledger/Fund Balance | Incomplete Documents Query | DOAR Report]

RELEASE: 1.0

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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.

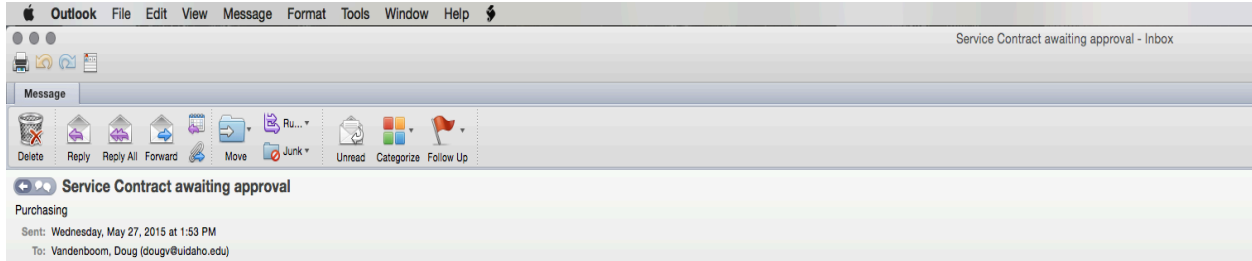
Once the contract has been fully executed by Contracts and Purchasing the originating department and contractor will be emailed a copy of the completed contract.

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.

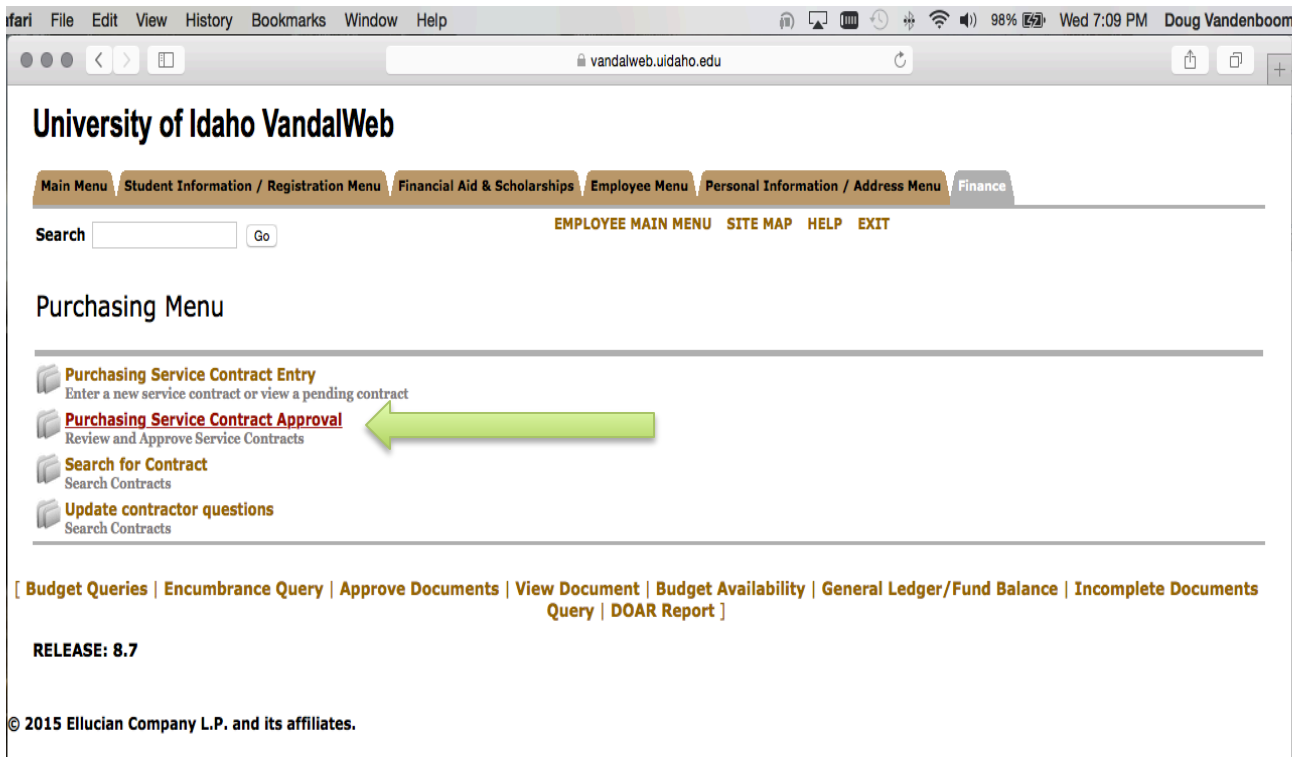
Contracts and Purchasing will also upload a copy of the completed agreement to the university imaging database.

APPROVALS

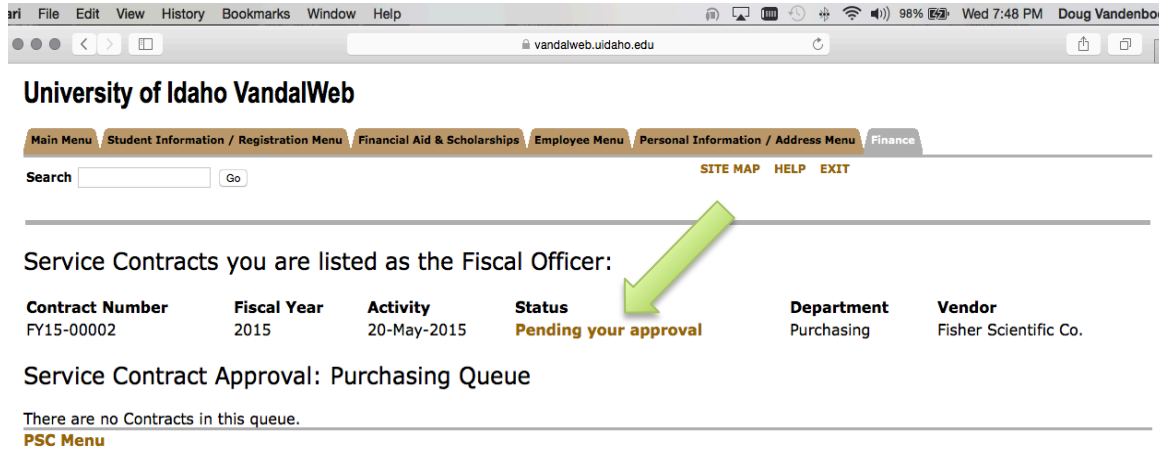
Approvers will be notified via an email from purchasing@uidaho.edu if a contract has been submitted for their approval.



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.



University of Idaho VandalWeb

Main Menu Student Information / Registration Menu Financial Aid & Scholarships Employee Menu Personal Information / Address Menu Finance

Search Go SITE MAP HELP EXIT

Service Contracts you are listed as the Fiscal Officer:

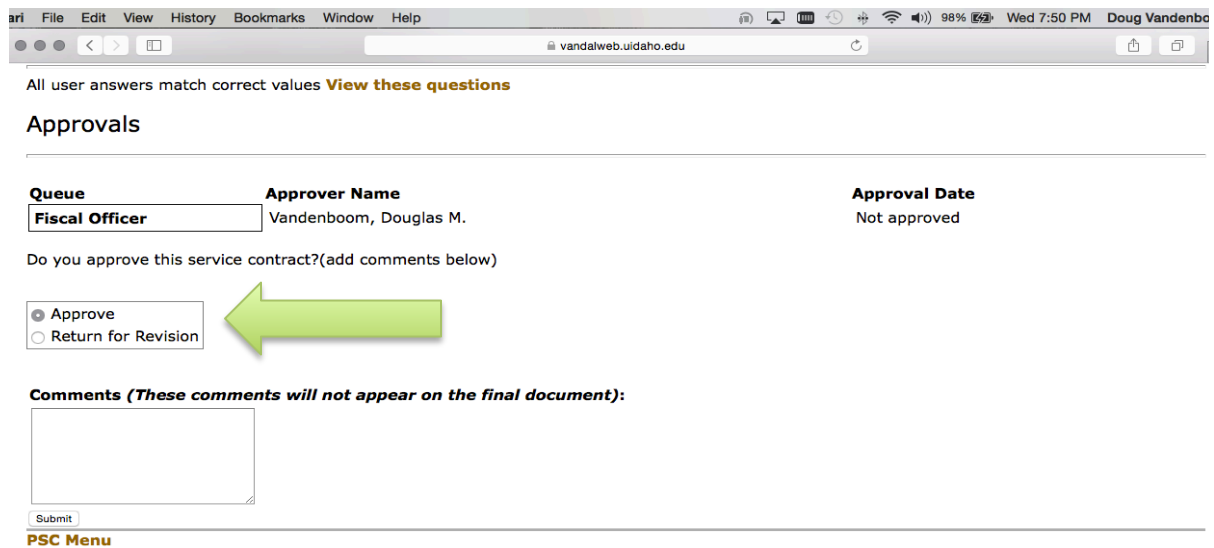
Contract Number	Fiscal Year	Activity	Status	Department	Vendor
FY15-00002	2015	20-May-2015	Pending your approval	Purchasing	Fisher Scientific Co.

Service Contract Approval: Purchasing Queue

There are no Contracts in this queue.

PSC Menu

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.



All user answers match correct values [View these questions](#)

Approvals

Queue	Approver Name	Approval Date
Fiscal Officer	Vandenboom, Douglas M.	Not approved

Do you approve this service contract?(add comments below)

Approve Return for Revision

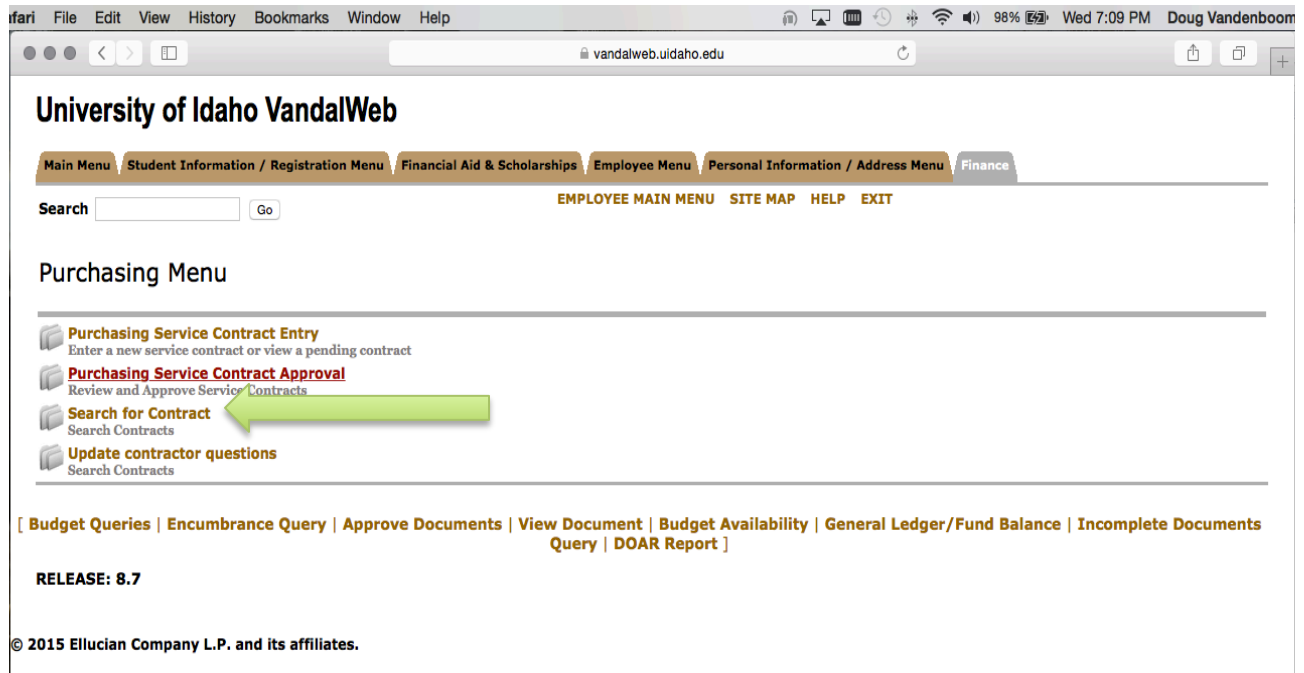
Comments (These comments will not appear on the final document):

Submit

PSC Menu

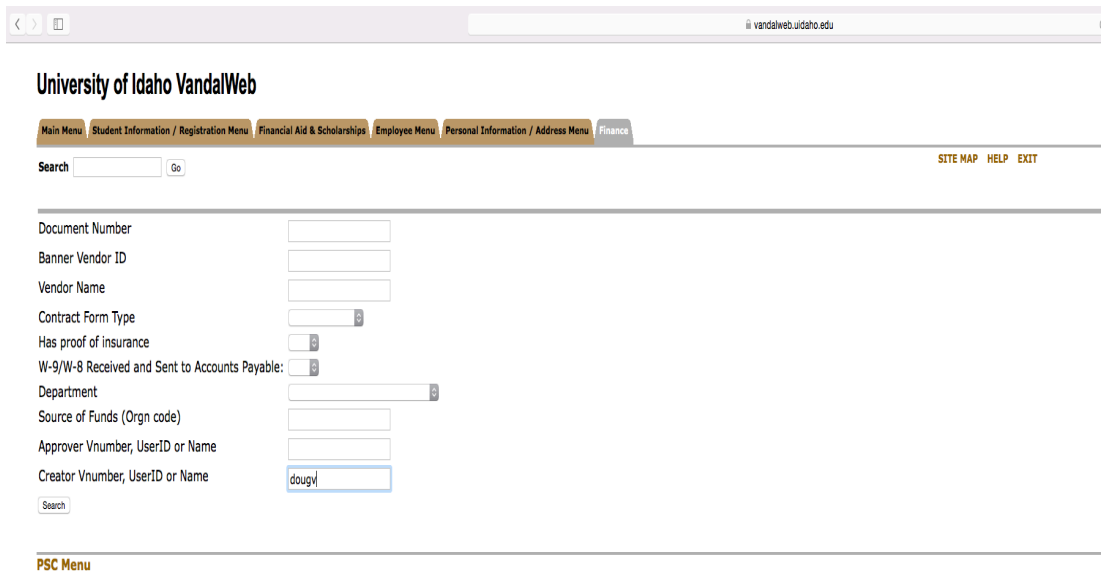
SEARCHING FOR A CONTRACT

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



The screenshot shows the University of Idaho VandalWeb interface. At the top, there is a navigation menu with links for Main Menu, Student Information / Registration Menu, Financial Aid & Scholarships, Employee Menu, Personal Information / Address Menu, and Finance. Below the navigation menu is a search bar with a 'Go' button. The main content area is titled 'Purchasing Menu' and contains four links: 'Purchasing Service Contract Entry', 'Purchasing Service Contract Approval', 'Search for Contract', and 'Update contractor questions'. A green arrow points to the 'Search for Contract' link. Below the links is a footer with various queries and a copyright notice for 2015 Ellucian Company L.P. and its affiliates.

To search for a contract click on the ***Search For A Contract*** link and enter the appropriate search criteria.



The screenshot shows the search criteria form on the University of Idaho VandalWeb. The form includes fields for Document Number, Banner Vendor ID, Vendor Name, Contract Form Type, Has proof of insurance, W-9/W-8 Received and Sent to Accounts Payable, Department, Source of Funds (Orgn code), Approver Vnumber, UserID or Name, and Creator Vnumber, UserID or Name. The 'Creator Vnumber, UserID or Name' field contains the text 'doug'. A 'Search' button is located at the bottom of the form. Below the form is a 'PSC Menu' link.

For example, a search by user name will generate a list of all contracts created by that particular user.

The screenshot shows the University of Idaho VandalWeb interface. At the top, there is a navigation menu with links for Main Menu, Student Information / Registration Menu, Financial Aid & Scholarships, Employee Menu, Personal Information / Address Menu, and Finance. Below the menu is a search bar with a 'Go' button. The main content area contains a search form with the following fields: Document Number, Banner Vendor ID, Vendor Name, Contract Form Type (dropdown), Has proof of insurance (checkbox), W-9/W-8 Received and Sent to Accounts Payable (checkbox), Department (dropdown), Source of Funds (Orgn code), Approver Vnumber, UserID or Name, and Creator Vnumber, UserID or Name (with 'doug' entered). A 'Search' button is located below the form. Below the search form is a table with the following data:

Document Number	Document State	Form Type	Department	Vendor	Source of Funds	Created By	Last Changed
FY15-00001	Incomplete					Vandenboom, Douglas M.	20-May-2015
FY16-00001	Pending Fiscal Officer or Department Approval	Short Form	Purchasing	Fisher Scientific Co.	SGX009	Vandenboom, Douglas M.	21-May-2015
FY15-00002	Purchasing Approval Queue	Short Form	Purchasing	Fisher Scientific Co.	SGX009	Vandenboom, Douglas M.	20-May-2015
FY16-00002	Purchasing Approval Queue	Short Form	Purchasing	Fisher Scientific	SGX009	Vandenboom, Douglas M.	27-May-2015

Below the table is a 'PSC Menu' link. At the bottom of the page, there is a footer with the following text: [Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Availability | General Ledger/Fund Balance | Incomplete Documents Query | DOAR Report]

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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.