PERSONAL SERVICES CONTRACTS START-UP GUIDE FOR WORKDAY

Requisitions will not be used to request contracts in Workday. Instead, the Contract Request will be used to initiate new contracts, contract amendments, and Requests for Proposals.

Prepare and/or collect the required attachments for a Contract Request.

1) Contract Request Form
2) PSC first draft on template

For a new contract, use only the current version of the PSC Template for the first draft. For an amendment, use only the current version of the PSC Amendment Template.

If the work of the Contractor is a form of IT consulting, [e.g., mobile app development, website design, software implementation, etc.] note that an ITS risk assessment is needed.

- Information Services Review Questionnaire
- To submit directly to IT for review: Online Information Services Review Questionnaire

A Supplier ID is required on the form. Perform a Workday search for the Contract with Find Supplier. If the Contractor is not found, obtain a W-9 from the Contractor and submit Create Supplier Request.

Open the Contract Request Form.

Complete page 1 of the Contract Request Form and then on page 2 choose the radio button for either PERSONAL SERVICES CONTRACT or CLIENT SERVICES CONTRACT.

Go to Part A Section 2 and provide answers to questions listed. Save a copy of the completed Contract Request Form.

<table>
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<tr>
<th>2. PERSONAL SERVICES OR CLIENT SERVICES AGREEMENTS</th>
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<td>Professional, technical or creative services provided by an independent contractor. Some examples: management consulting, accounting, auditing, marketing, public relations, research &amp; surveys, web design, communication projects, medical &amp; health services, employee coaching or training, candidate recruiting, employee coaching, and services delivered directly to students. This is not an inclusive list.</td>
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| UPLOADS |
| Supplier’s proposal or a document detailing the scope of work, timeline, and compensation for contractor prepared by the project manager. |
| Draft 1 of the agreement prepared with PSC template. |
| For grant-funded contracts: except from funding proposal indicating Contractor was named in the proposal and that the budget includes a line item for consulting. |
| If not a grant-funded contract: signed and dated sole source justification memo if compensation amount is over $10,000. |
| ITS Risk Assessment Determination, if available. |

| QUESTIONS |
| Does the contractor’s scope of work include web design? |
| Does the contractor’s scope of work include making audio or video recordings of research participants, students or other individuals? |
| Does the contractor’s scope of work include delivering health care services to students, research participants, or others? |
| Does the contractor’s scope of work include work with any data? If so, what types of data? |
| Has an ITS risk assessment been requested? |
| What is the ITS risk assessment ticket number for the request? |
| Has the ITS risk assessment been completed? If so, was the rating low, medium or high risk? |
| Is the contractor currently an employee of the University of Washington or any other WA state agency or institution? |
| Is the contractor a former or retired state of Washington employee? |
Workday Task: On the welcome page select **Requests** from the array of Applications

Choose **All Requests** then choose **Contract Request**. Next click on the Contract Request "**twinkie**" and then on **Request**.

See next page.
PURPOSE OF CONTRACT
NOTE THIS:
NAME OF CONTRACTOR
NEW CONTRACT OR CONTRACT AMENDMENT?
CONTRACT NO. IF KNOWN

IF UNCERTAIN, REFER TO PAGE 2 OF CONTRACT REQUEST FORM.

FIND THE CONTRACT REQUEST FORM AT https://confluence.esg.wsu.edu/display/WKB/Contract+Request

PSC TEMPLATE
AND
A SCOPE OF WORK
AND/OR
CONTRACTOR’S PROPOSAL OR QUOTE

IF THE CONTRACT REQUEST IS FOR A REQUEST FOR PROPOSAL, UPLOAD THE FIRST DRAFT OF YOUR RFP IN THIS SPACE.
Next, in the cloud comment field add:

1) name of contractor (again, please)
2) remarks to your Cost Center Manager who will approve the Contract Request before it comes to Purchasing Services.

In Attachments field add all other applicable documents.

Click on Submit.

See next page to better understand how a contract is created and works its way through Workday processes.

To view your Contract Request – the one you just created, or any others, go back to the welcome page and select Requests from the array of Applications. Then choose My Recent Requests.
# Workday Contract Processes

**Key:**
- blue = occurs within Workday
- lavendar = occurs outside of Workday
- SPC = Supplier Contract

## The Role
### Requester of Contract
- Creates Contract Request
- Submits Request

### Contract Specialist
- Receives & Vets Contract Request
- Reviews, Communicates with Requester if Necessary
- Submits SPC in Workday. Cost Center Mgr, or Gift/Grant/Prog/Proj Mgr Receives SPC for Initial Financial Approval.

### Requester of Contract
- Receives Contract Request Approval Notice via Workflow and Notes SPC# Assigned to Contract
- Waits for Fully Executed Copy of the Contract.

### Cost Center Mgr, or Gift/Grant/Prog/Proj Mgr
- Gives Initial Financial Approval of Worktags and Estimated Cost.
- Approves Request, which is Returned to Contract Specialist via Workflow.

### Contract Specialist
- Receives Notice via Workflow of Initial Financial Approval.
- Closes Contract Request Process.

### Contract Specialist
- Drafting, Redlining, Conferring with Dept Contact and Contractor, Assembling Documentation, Acquire Approval of Final Draft.

### Contract Specialist
- Executes Contract
- Emails Contract to Contractor for Countersignature

### Contract Specialist
- Receives Fully Executed Copy of Contract

### Contract Specialist
- Completes the SPC Record and Uploads All Documentation.
- Submits SPC to Financial Approver