

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 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 current version of [PSC Template](#) for 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, [ie 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 SupplierID is required on the form. Perform a Workday search for the Contractor with **Find Supplier**. If Contractor is not found, obtain W9 from 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 radio button for either PERSONAL SERVICES CONTRACT or CLIENT SERVICES CONTRACT.

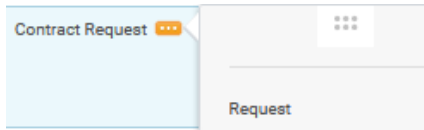
Go to Part A Section 2 and provide answers to questions listed. Save a copy of the completed [Contract Request Form](#).

2. PERSONAL SERVICES OR CLIENT SERVICES AGREEMENTS		
<i>Professional, technical or creative services provided by an independent contractor. Some examples: management consulting, accounting, auditing, marketing, public relations, research & surveys, web design, communication projects, medical & health services, employee coaching or training, candidate recruiting, employee coaching, and services delivered directly to students. This is not an all-inclusive list.</i>		
UPLOADS	<ul style="list-style-type: none">• 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: excerpt 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.

← Contract Request

If you are unsure which office will need to process your request, please refer to <https://policie.s.wsu.edu/prf/index/manuals/10-00-contents/10-11-processing-university-contracts/>

If this request is related to a software or IT-related contract, please ensure the ITS Questionnaire is completed and attached.

Describe the Request *

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

This questionnaire will be used to route your contract to the appropriate contracting authority. Complete the questionnaire to the best of your ability.

Does this contract request need to be routed to Purchasing Services or REBO? (Required)

- ☐ Purchasing Services
☐ REBO

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

Attach a copy of the contract request form. (Required)

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

Drop files here

or

Select files

Attach a copy of the contract. (Required)

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

Drop files here

or

Select files

IF THE CONTRACT REQUEST IS FOR A REQUEST FOR PROPOSAL, UPLOAD THE FIRST DRAFT OF YOUR RFP IN THIS SPACE.



enter your comment

Attachments

Submit

Save for Later

Cancel

Next, in the cloud comment field add:



enter your comment

- 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**.



Search

← Requests

Actions

Create Request

View

All Requests

My Requests

My Recent Requests

View Request Types

Requests In Progress

Workday Contract Processes

Key: blue = occurs within Workday

lavendar = occurs outside of Workday

SPC = Supplier Contract

THE ROLE	THE TASK	THE ACTION
REQUESTER OF CONTRACT	CREATES CONTRACT REQUEST	SUBMITS REQUEST
CONTRACT SPECIALIST	RECEIVES & VETS CONTRACT REQUEST	REVIEWS, COMMUNICATES WITH REQUESTER IF NECESSARY
CONTRACT SPECIALIST	CREATES SPC RECORD	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	MANAGES CONTRACTING PROCESSES OUTSIDE OF WORKDAY. NO SIGNIFICANT CHANGES TO LEGACY PROCESSES.	DRAFTING, REDLINING, CONFERRING WITH DEPT CONTACT AND CONTRACTOR, ASSEMBLING DOCUMENTATION, <u>ACQUIRE APPROVAL OF FINAL DRAFT</u>
CONTRACT SPECIALIST	EXECUTES CONTRACT	EMAILS CONTRACT TO CONTRACTOR FOR COUNTERSIGNATURE
CONTRACT SPECIALIST	RECEIVES FULLY EXECUTED COPY OF CONTRACT	DISTRIBUTES FULLY EXECUTED COPIES TO REQUESTER OF CONTRACT, THE CONTRACT MANAGER AND PROJECT MANAGER.
CONTRACT SPECIALIST	COMPLETES THE SPC RECORD AND UPLOADS ALL DOCUMENTATION.	SUBMITS SPC TO FINANCIAL APPROVER