



## Procurement & Contracts

### INSTRUCTIONS FOR SUBMITTAL OF INDEPENDENT CONTRACTOR AGREEMENT (ICA) AND REQUISITION

#### A. INSTRUCTIONS FOR SUBMITTAL BY REQUESTOR:

1. Read this document thoroughly as it may have changed since you last used the process.
2. After receiving approval via the Contractor Determination Form from Human Resources, Requestor completes the ICA in accordance with these instructions.
  - a. Choose the appropriate ICA template based on whether the Contractor Determination Form requires a background check.
    - i. If a background Check is required choose the following agreement: Independent Contractor Agreement. Background Check Required. Please make sure the IC signs Rider B Background Check Compliance Statement.
  - b. Requestor, with input from the Independent Contractor (IC), enters fillable information on Pages 1 and 2, the agreement face sheet.
    - i. The lump-sum payment should include any travel expenses. Travel expenses will not be paid separately or reimbursed outside of the ICA.
  - c. IC signs and returns the agreement to Requestor.
3. Requestor initiates the Payee Data Record Form 204 and sends it to the IC using the Adobe Sign workflow on Accounts Payable's website at <https://adobesigndynamicworkflow.csusm.edu/ap>, if not already on file. **Please allow five (5) business days for Form 204 processing/supplier setup. Procurement is not able to process the Purchase Order until the supplier setup is complete.**
4. Enter a requisition in CFS with the following attachments: ICA filled out and signed by IC and the HR Contractor Determination form. The requisition should have the supplier number on it or indicate that Form 204 has been routed using the Adobe Sign Workflow. Please do not attach the payee data record to the requisition.
  - a. Enter the IC contact information in the comments.
  - b. Enter the department point of contact in the comments.
  - c. Enter UOM as "LOT."
5. **Submit requisition no later than 10 working days prior to the commencement of services with all required attachments and information.**
6. Procurement will countersign the agreement and issue the Purchase Order (PO).
7. Procurement will email the Requestor and IC a copy of the executed ICA with the PO number on the top right-hand corner and a copy of the PO (for encumbrance purposes only).
8. IC or Requestor will submit an invoice to Accounts Payable in accordance with the ICA.
9. Accounts Payable will remit payment.
10. In the event that the nature of the services is changed, the compensation is changed, or the term is extended, please contact Procurement to create an amendment for the ICA.

**Note:** Non-US Citizen or Permanent Resident Alien: The Office of Global Education must be contacted prior to completing the agreement and requisition in order to verify eligibility to receive payment for services. Additional forms may be required for supplier setup.

**Note:** Please plan your purchase with adequate time for HR review, supplier setup through Accounts Payable, and Independent Contractor Agreement and PO processing through Procurement. Late submittals may require that the services or event be rescheduled to allow time for the supplier setup and issuance of a Purchase Order.