PERSONAL SERVICES CONTRACTS START-UP GUIDE FOR WORKDAY

Open the Contract Request Form. Requisitions will not be used to request contracts in Workday. This form will be also be accepted to initiate a Contract Amendment and also Requests for Proposals for competitively awarded contracts.

A SupplierID is required on the form. Perform a Workday search for the Contract with Find Supplier. If Contractor is not found, obtain W9 from Contractor and submit Create Supplier Request.

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.

Then prepare the required attachments for Workday. Use only current version of PSC Template for first draft. [insert REBO’s link]

Workday Task: On the welcome page select Requests from the array of Applications

Choose View Request Type then choose Contract Request. Next click on the Contract Request “twinkie” and then on Request.
In the field labeled **Describe the request** enter **name of contractor**, and if applicable **existing contract no. and amendment number**. Or, indicate the request is for a **Request for Proposals**.

Choose the following responses to the six questions. Below are typical responses for a new personal services or client services contract.

<table>
<thead>
<tr>
<th>Question</th>
<th>Response Options</th>
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<tbody>
<tr>
<td>Which of the following describes the request? (Required)</td>
<td>Revenue, Non-monetary, Spend</td>
</tr>
<tr>
<td>Is the agreement for the purchase of land or facilities? (Required)</td>
<td>Yes, purchase or rental of land or facilities</td>
</tr>
<tr>
<td>Is the agreement for services? (Examples include equipment maintenance contracts, bus charters, catering, speakers/performers, etc.) (Required)</td>
<td>Yes,Speakers/Performer, Training or Education, Yes,Speakers/Performer, Entertainment, Yes, Services, No Speaker/Performer, No, The request does not include services</td>
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<tr>
<td>Does the agreement pay for wages of workers, laborers, or mechanics who are skilled in the trades of construction, Alteration, repair, or improvement? Examples include carpenters, masons, electricians, painters, roofers, etc. (Required)</td>
<td>Yes, prevailing wages, No, prevailing wages</td>
</tr>
<tr>
<td>Is the agreement for goods or software? Examples include equipment, maintenance, copier lease, software license, etc. (Required)</td>
<td>Yes, includes goods or software, No, does not include goods or software</td>
</tr>
<tr>
<td>Is the request for a new contract, renewal, or amendment? (Required)</td>
<td>New, Renewal</td>
</tr>
</tbody>
</table>

Then, upload the required documentation you’ve prepared and collected.

Upload the completed **Contract Request Form** in the next field.

In the next field for required attachments upload:

1. **FOR NEW CONTRACTS**: Your first draft of the contract prepared with PSC Template, or
2. **FOR CONTRACT AMENDMENTS**: a first draft.
3. **The supplier’s proposal or a document detailing the scope of work, timeline and compensation, if any**
4. **FOR REQUEST FOR PROPOSAL**: first draft. Email purchasing@wsu.edu for a suitable model for the draft.

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.