

## 1. Plan

It can take several weeks to get the paperwork needed to contract with a service provider so it is best to start well in advance. TIP: Policy requires that all approvals must be complete and the purchase order issued to the vendor before the service may begin. Contracts or PO's are not issued "after-the-fact"

## 2. Identify

Use HR's "[Decision Tree](#)", to determine the correct process for engaging services.



## 3. Get the forms

Independent Contractors are processed in uShop (other service providers are not).

There are two places to get the forms you'll need: the uShop Home page (look for the above image) and the Purchasing website.

## 4. Complete the forms & send to vendor

See the instructions on the forms for details. Call if you need help or clarification.

## 5. Vendor returns the signed forms

### Vendor faxes W-9 to 910/962-7006

This is A/P's secure fax extension. Don't attach the W9 to your uShop requisition.

### Vendor emails/faxes/mails the PUR.140 (+ other documents, if any) to your department.

Save the document(s) as PDF files for upload.

TIP: An electronic signature is ok on the PUR 1.40

## 6. Create the uShop Requisition

### Use the uShop Special Processing Form for Independent Contractors

Query the supplier's name. If the name is not in the system select "**Independent Contractor**".

Follow directions and upload the PUR 1.40 file (and other documents, if any). Add to cart.

Complete the delivery date, FOAPAL (acct code 921990 is most often used), adding Internal Notes as needed. Click "Place Order".

## The Documents:

Form	Less than \$600	Between \$600 and \$10,000	Greater than \$10,000
<input type="radio"/> W-9 Request for Taxpayer ID number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> PUR 1.40 UNCW Application for Independent Contractor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> uShop Special Processing Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Sole Source Justification		<input checked="" type="checkbox"/> If over \$5000	<input checked="" type="checkbox"/>
<input type="radio"/> Personal Service Contract			<input checked="" type="checkbox"/>
<input type="radio"/> Immigration & Tax Documents	Varies – Contact Tax Office for details		
<input type="radio"/> Criminal Background Check			
<input type="radio"/> Consultant Services	Contact Purchasing to coordinate Chancellor Office Approval		



# The Support Team

Hiring an independent contractor is a collaborative process! Please don't hesitate to contract any of us for help:

## **uShop Administration**

Jody Leber  
X 23400

## **Human Resources**

Caroline Dellinger  
X 23162

## **Controller's Office**

Lisa Eakins  
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## **Purchasing Services**

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UNCW Purchasing Services

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# UNCW Quick Guide for Engaging Independent Contractors

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An overview of UNCW's process for successfully engaging personal services

