

Contract and Agreement Routing (CAR) Form Instructions

Allow 7-10 business days for the CAR and Payment Request to be processed.

Step 1 – To be completed by the individual arranging the contract/agreement.

- Complete the date, the name of the requester, phone extension and the email address of the person that you would like the contract emailed back to. All contracts will be emailed back to the requestor; hard copies will no longer be returned.
 - Step 1 replaces the need for a Purchase Requisition to be completed. This pertains to contracts only.
 - Only one signed copy of the contract is required.
- Indicate whether there is a W-9 on file with the Business Office. If you are uncertain, please contact anyone in Accounts Payable or Purchasing. If there is no W-9 on file, please request a [W-9](#) from the vendor and attach to the Contract and Agreement Routing (CAR) form along with the contract/agreement. **The name on the W-9 must match who is being paid in contract/agreement.** This is important as it is how the vendor will be paid and will avoid delays in the payment being received.
- If vendor is an out of state resident and will be paid more than \$1500 please give them instructions to review both [IRS Form 587](#) and [IRS Form 590](#). Both forms should be provided to the vendor for their determination of which is applicable. The completed form should be submitted along with the CAR form.
- **Note:** We will not contract with employees or enrolled students. Please review all 3 pages and complete the [Worksheet on Worker Status](#). If you have any questions regarding the worksheet contact Human Resources or Payroll.
- Give the **total estimated dollar amount** that will be paid to the contractor over the length of the contract.
- Identify the funding source(s) for the services that will be performed.
- Obtain all required signature(s) of those authorized to sign on the indicated funding source GLs. If you are unsure, contact anyone in Accounts Payable or Purchasing. Failure to get all necessary GL approvals will delay the processing of the CAR paperwork.
 - If you are a Department that is under the Dean of the School of Liberal Arts (SOLA), Stephen Woolpert, or the Vice Provost for Graduate Programs, Chris Sindt and the amount is over \$1,000; the CAR form must also be signed by the Dean of SOLA or the VP for Graduate Programs.
 - If the estimated total is over \$3000 and your Department falls under the Provost, the Provost must also sign the CAR form in Step 1.

Step 2 – To be completed by the individual arranging the contract/agreement.

- Select the specific agreement required based on the type of service that Saint Mary's will be receiving. Please note that proof of insurance is required for all agreements. Proof of insurance must be provided or it may be purchased by completing the [General Liability Insurance](#) Form. Contact Coordinator for Administrative Services at x4571 with any insurance questions or concerns.

Use the key below to determine which agreement is required.

- Speaker/Performer/Artist: [Speaker Agreement](#)
- All other services (consulting, photography, *catering, etc): [Independent Contractor Agreement](#)
- [Transportation Agreement](#) please check with Administrative Services or Purchasing to see if a contract is already on file for your vendor or if a new contract is required.
- For Space Rental, Equipment Rental or Hotel use, attach vendor's agreement. A fully executed agreement needs to be returned to Purchasing for our records.

***Additional requirement for Food Service/Catering Agreements:**

- For on-site catering agreements the [Food Liability Waiver](#) titled Agreement Waive Food Liability and Provide Indemnification Form must be completed and included with the contract. This document is required even if insurance is provided.
 - For off-site catering agreements, if insurance is not provided, the [Food Handling Guidelines](#) Form is required to be signed by the vendor and included with the contract.
- Indicate if insurance certificate is attached. If the vendor does not have insurance which can be provided, one day coverage can be purchased for \$100 per event. See [General Liability Insurance](#) for this form. Contact Administrative Services at x4571 with any insurance questions.
 - Indicate when services will begin and be completed or when the finished product will be delivered.
 - Indicate the payment schedule; if there is a deposit amount and when deposit payment is due. Indicate the final payment amount and when final payment is due. Also indicate if it is a one time payment or multiple billings.
 - Lastly, indicate the preferred payment method. Please note that the entire contract amount must be paid by one method only (all by check or all by credit card). This helps with the 1099 tax reporting process. You can choose from the following:
 - Check Request or Invoice will be submitted to Accounts Payable when payment is due.
 - Payment is due now, please go ahead and process payment. I have attached the payment request.
 - If you are ready to make payment at the time the CAR is submitted for processing, please be sure to include the payment request with the contract. This can be an invoice or a completed check request. Leave the CAR field blank if you have not been issued a CAR number for the services. Purchasing will route the request directly to Accounts Payable for processing.
 - Purchasing to place the payment on the College credit card.
 - If the vendor requires a completed credit card authorization form, please be sure to include this with the contract.
 - Requesting to put on my P Card.
 - If cardholder is different than Requestor in Step 1, please indicate. Purchasing will determine if the dollar amount is within appropriate parameters and will open up the requested P Card to allow the charge. **No charges for services should be placed on a P card without first receiving a CAR number.** This number is to be referenced at the time the transaction is signed off by the cardholder.



Once you have completed Steps 1 and 2, attach all necessary paperwork to the CAR form including **all** pages of the signed contract/agreement and deliver to Purchasing for processing. Allow 7-10 business days for the CAR and payment to be processed.

Step 3 – To be completed by Purchasing Department.

Once your agreement has been processed by the Business Office, the CAR form and a fully executed agreement will be emailed back to the requestor. Upon receipt of the email, please look for the following: The CAR #, which needs to be indicated on your payment request and if a Purchasing Order (PO) number was issued.

- A PO will be opened if the amount is over \$3,000 and services will be performed at least 30 days out.

How to initiate the payment request for services performed under the contract:

- Once you are ready to make payment, complete a [Check Request](#). You do not need to attach a copy of the agreement; simply indicate the CAR number that was provided when the CAR was emailed back to you. This confirms that an agreement was put in place and is on file. If you were issued a PO #, please indicate this on the Check Request as well. **Sign the Check Request confirming that the work has been completed** and submit to Accounts Payable. Please note that the check processing timeframe is 7-10 business days, so please allow sufficient time for the payment to be processed.
- If you placed the payment on your P Card, please indicate in the Comments field the CAR # and the PO # (if applicable). Indicating the CAR # helps us easily determine that a contract was put in place.
- If payment method is on the College credit card, no further information is needed to process payment.

****If you have any questions regarding the CAR form or contract process please contact Purchasing at x4916.****