



# Scope of Work (SOW) Instructions

Before ANY work takes place, a Scope of Work/Independent Contractor form must be completed and approved by Employee Services for all service providers who operate under a social security number.

All information regarding the SOW process may be found here:

<https://www.cu.edu/employee-services/collaborative-hr-services/cu-campuses/scope-work-sowindependent-contractor>

Scroll down to the “start a scope of work form”. The form will take 10-15 minutes to fill out and must be completed in one sitting. Here is some helpful information for when you’re filling out the form:

**\*\*everything on the form with asterisks must be filled out\*\***

## CU Contact Information

1. Department – Environmental Studies
2. Department Number – 10169
3. Are you the same person who will approve this SOW request – YES

## Service Provider Information

4. Name (first and last)
5. Email
6. The other information may be filled out by the service provider once form is routed to them for signature

## Proposed Work Information

7. Provide enough detailed information about the work to be performed or SOW will be returned

## Payment Details

8. Contract begin and end date must be within the period of performance, if paying with a fund 30.
9. Total amount needs to include travel-related expenses.
  - a. It is prohibited to use other, separate procurement methods (Procurement Card, Travel Card, Marketplace Purchase Order, or Non-Employee Reimbursement form) to cover travel costs for the independent contractor. Rather, they must include these expenses on their invoice(s).

## Internal Revenue Service Classification Factors Checklist

10. Questions will determine if the service constitutes as an independent contractor or an employee

## Service Provider Certification/Authorizations

11. Authorizing name will auto-populate
12. Fill in “Org Unit Authorizing Title” (i.e. Professor, Assistant Professor, Research Associate, etc.)
13. Click the “Submit” button.



## The form will then automatically route for all signatures (certification)

14. Service Provider Certification
  - b. At this step the service provider will be able to fill in their personal information
15. Organizational Unit Certification (SOW requestor)
16. Employee Services Approval

## What happens now

The form now takes time to get the approvals (up to 7 business days). After Employee Services approves the SOW form, you will receive a copy with all signatures.

The independent contractor will need to send invoices to be paid. Purchase Orders (PO's) are set up for multiple payments (invoices) to the independent contractor over time, while one-time services are paid on a payment voucher. See the [Procedures for Processing Invoices](#) document for information.