



TCM: FIU Agreement Templates Procedure

FIU's Independent Contractor Agreement and the Services/Entertainment/Performance Agreement Templates should be used for all service and performance purchases when a written agreement with a supplier is required and in the best interest of the University.

Any supplier that will be entering into an agreement with FIU must be set up as an active supplier in PantherSoft prior to the agreement being processed in TCM.

These templates are stored in the Total Contract Manager (TCM) system and must be entirely filled out and processed within the system, by the requesting department. The agreement templates include:

Independent Contractor Agreement:

- A term Contract that allows for multiple payments to the supplier.
- Used when the supplier is providing services that are not on the [allowable unencumbered payment list](#).

Services/Entertainment/Performance Agreement:

- A one-time payment contract.
- Service/performance must be on the [allowable unencumbered payment list](#).
- Cannot be used for foreign vendors.
- Does not require a requisition or purchase order.

Note: Using one of FIU's agreement templates is highly recommended, however, if a Supplier's agreement is used, it is processed in TCM by selecting **Purchase of Goods or Services** in the **Create Contract** section of TCM. Further instructions can be found starting on page 25 of the [Total Contract Manager System \(TCM\) Manual](#).

Instructions for Processing FIU Agreement Templates in TCM

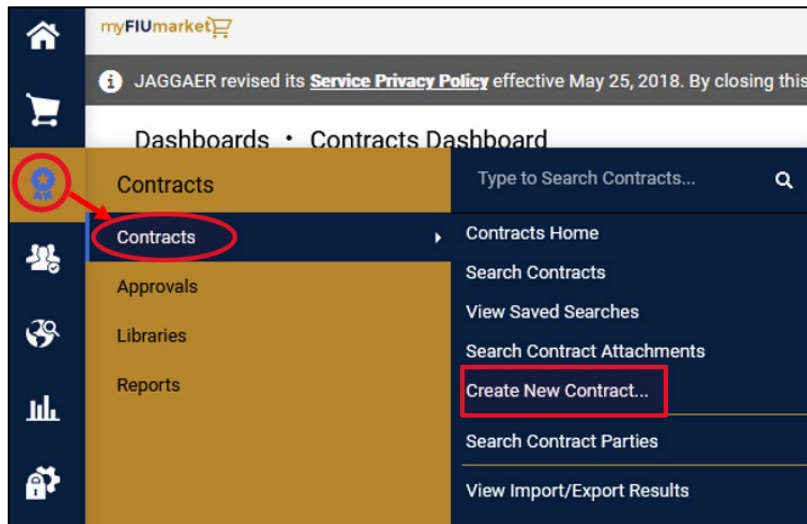
Prior to creating a new contract in TCM, users must first verify that the appropriate Supplier is active and available for selection in TCM.

After confirming that the Supplier is available for selection within TCM, the Contract Manager is ready to initiate a new contract.

Independent Contractor Agreement

1. Creating a New Contract

- a. The link to create a new contract is found through the **Contracts** icon within the left-hand navigation bar.



- b. On **Step 1 of 1** of the **About the Contract** screen, enter all required (*) fields:
 - **Contract Name** – Enter a contract name that is clear and concise and that will be easy and helpful in searching for the contract in the future.
 - **Contract Type** – Click within the box to view selections or type the desired selection within the box.

Create Contract

About the Contract (Step 1 of 1) ?

Contract Name * ⓘ

Contract Type *

* Required Create Contract

- c. Select the required **Contract Type**. In this case select **Independent Contractor Agreement**

Create Contract

About the Contract (Step 1 of 1) ?

Contract Name * ⓘ

Contract Type *

- Independent Contractor Agreement**
In: FIU > Purchasing > Independent Contractor Agreement
- Purchase of Goods or Services
In: FIU > Purchasing > Purchase of Goods or Services
- Services Entertainment Performance Agreement
In: FIU > Purchasing > Services Entertainment Performance Agreement

* Required Create Contract

- d. Since Independent Contractor Agreement template was selected as the Contract Type, the Contract Template field should automatically populate as the same (Independent Contractor Agreement). Select **Independent Contractor Agreement** as the **Main Document** template Select **Create Contract**.

Create Contract

About the Contract (Step 1 of 1) ?

Contract Name * ?

Contract Type *
 x Q
In: FIU > Purchasing > Independent Contractor Agreement

Use Contract Template Yes No

Contract Template *
 x Q

Work Group *
 x Q

Main Document Template
 x Q

* Required

2. Contract Header

- a. The questions in the **Contract Header** section will require entry of information pertaining to the contract. All required (*) entries are to be completed. The contract is now initiated and assigned a Contract Number (PUR-#####). More information about completing the contract header section can be found in the [Total Contract Manager System \(TCM\) Manual](#), starting on page 28.

Draft Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party need to be assigned to this contract before it can be made active for shopping. Both a Start and End Date are required to make this contract active for shopping. Contract Actions

🔒 This Contract is currently checked out to You It is locked and cannot be edited by others until you check it in.

PUR-00748

Type: Independent Contractor Agreement

2nd Party:
Version: Renewal 0, Amendment 0

[Lifetime Spend \(USD\)](#)

Summary

Header

Alternative Language (Do ...)

Attachments

Obligations

Review Rounds

Contract Header

Contract Number * PUR-00748

Contract Name *

Contract Type *
 x Q

Work Group *
 x Q

Summary ?
No Text Entered

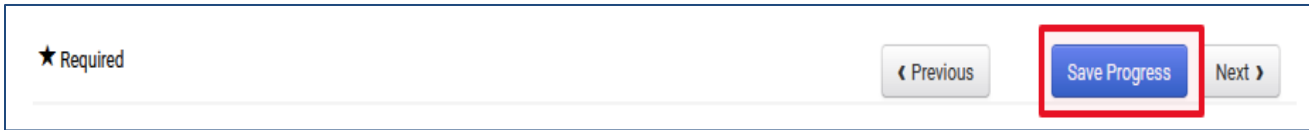
Parent Contract ?
 Q

Use eSignature for this contract? * ?
 Yes No

Show on Supplier Portal ?
 Yes No
 Inherit From General Contract Settings - Current Setting: No

Name	Currently Visible	Type	Contact	Contract Address
The Florida International University Board of Trustees		First Party (Primary)	-	-

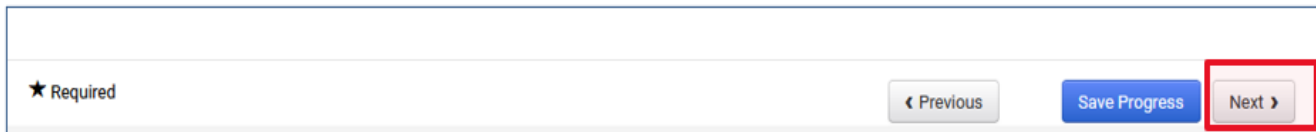
Note: Please save frequently via the **Save Progress** button located at the bottom of the page. The system automatically times out after **15 minutes**, regardless of activity.



★ Required

◀ Previous **Save Progress** Next ▶

- b. Proceed to the next page by clicking **Next** once all items have been completed.

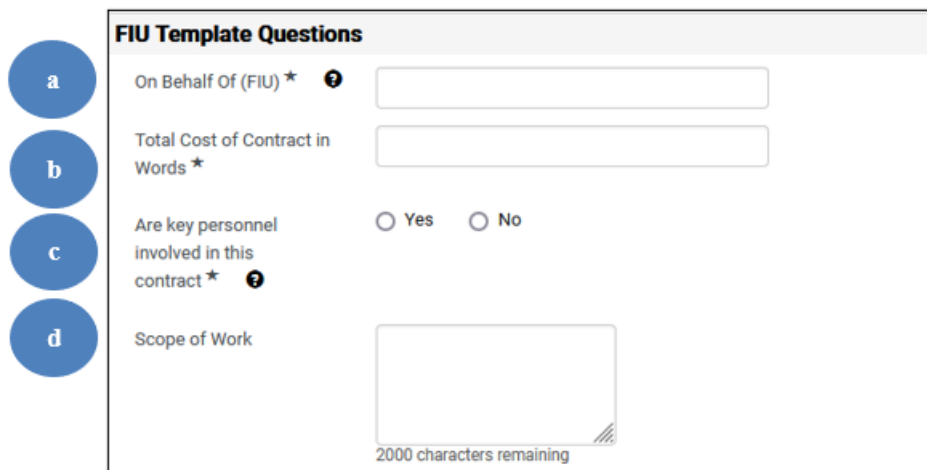


★ Required

◀ Previous Save Progress **Next ▶**

3. FIU Template Questions (For Independent Contractor Agreement)

- a. Enter the responsible FIU department's name.
- b. Enter the total cost of the contract in words.
- c. Enter the Key Personnel for the Supplier – Yes or No can be selected.
- d. Enter the Scope of Work - a detailed description of the services being provided.



FIU Template Questions

a On Behalf Of (FIU) ★ ⓘ

b Total Cost of Contract in Words ★

c Are key personnel involved in this contract ★ ⓘ Yes No

d Scope of Work

2000 characters remaining

4. Alternate Language (Do Not Use)

There is no action to be taken here. Please advance to the **Next** item.

5. Attachments

- a. The completed agreement template can be found in the **Attachments** section as the **Main Document**. It should be entirely filled out. You should thoroughly check the agreement to make certain that all fields have been completed accurately. At this point, the completed agreement must be sent to the supplier via email for review and approval prior to submission for approval in TCM. Once the supplier approves **without changes** to the agreement, the agreement is ready to be submitted for approval.

The screenshot displays the 'Attachments' section for contract PUR-00712. The left sidebar shows the contract details, including the type 'Independent Contractor Agreement' and the dates '5/24/2023 - 5/24/2023'. The main content area shows a table of attachments. The 'Main Document' attachment is highlighted with a red box. The table has the following columns: Print Order, Attachment, Print with Full Contract, Version, Size, and Date Uploaded. The 'Main Document' attachment is listed as '2023-05-24 PUR-00712 - Independent Contractor Agreement (version 1).docx' with a size of 52 KB and a date of 5/24/2023 at 7:40:22 PM. The 'Print with Full Contract' column has a checkmark, and the 'Version' column has the number 1. The 'Date Uploaded' column has the date and time. The 'Print Order' column has the number 1 and a crown icon. The 'Attachment' column has a download icon and the text 'Main Document'. The 'Print with Full Contract' column has a checkmark. The 'Version' column has the number 1. The 'Size' column has the text '52 KB'. The 'Date Uploaded' column has the text '5/24/2023 7:40:22 PM'. The 'Actions' column has a dropdown arrow. The 'Main Document' attachment is also marked as the 'Main Document' with a crown icon. The 'Add Attachments' button is visible above the table. The 'Previous' and 'Next' buttons are at the bottom right of the page.

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	Actions
1	Main Document 2023-05-24 PUR-00712 - Independent Contractor Agreement (version 1).docx	✓	1	52 KB	5/24/2023 7:40:22 PM	Actions

- b. Documents to be printed with the contract can be uploaded as attachments.
- c. Supporting documents are also uploaded as attachments.
- d. For instructions on uploading document as Attachments, go to the Contract Attachments section, starting on page 67 of the [Total Contract Manager System \(TCM\) Manual](#).

6. Obligations

There is no action to be taken here. Please advance to the **Next** item

7. Review Rounds

- a. The Review Rounds feature allows contract managers and administrators to send a contract to selected internal users for review before it is approved.
- b. Only the **Internal** Review Rounds should be used
- c. The workflow must be in Draft status to perform the Review Rounds process.
- d. Click on this [Review Rounds](#) link for instructions if Review Rounds are required.

8. eSignature

- a. Instructions on Assigning Parties for **eSignature** can be found in the **Assigning First and Second Party Signers for eSignature** section of of the [Total Contract Manager System \(TCM\) Manual](#), starting on page 71.

9. Submit for Approval and Approval Workflow

- a. Once all sections are completed, you may click **Submit for Approval**. Instructions on Submitting for Approval and Approval Workflow can be found in the **Submit for Approval and Approval Workflow** section of of the [Total Contract Manager System \(TCM\) Manual](#), starting on page 76.

10. Obtaining eSignature Via DocuSign

- a. Once all approvals have been provided, **the system automatically launches eSignature** to obtain all necessary signatures.

11. Executed Agreement

- a. Once the Agreement is fully signed by all parties and in Executed status, you can open or download the **Executed Agreement** by clicking the

Attachment link on the left-hand side of the page. Then clicking on the **Full Contract PDF** link.

PUR-00712
Lyn Test 4

Type: Independent Contractor Agreement
2nd Party: TSETST
Dates: 5/24/2023 - 5/24/2023
Version: Renewal 0, Amendment 0
[> Lifetime Spend \(USD\)](#)

View Contract ▾

Summary

Header	✓
Conflict of Interest	✓
Information Technology	✓
Alternative Language (Do ...)	1
Attachments	2

PUR-00712
Lyn Test 4

Type: Independent Contractor Agreement
2nd Party: TSETST
Dates: 5/24/2023 - 5/24/2023
Version: Renewal 0, Amendment 0
[> Lifetime Spend \(USD\)](#)

View Contract ▾

Summary

Header ✓



Attachments

Contract was sent for approval on 5/31/2023.

[Full Contract PDF](#) (126 KB)

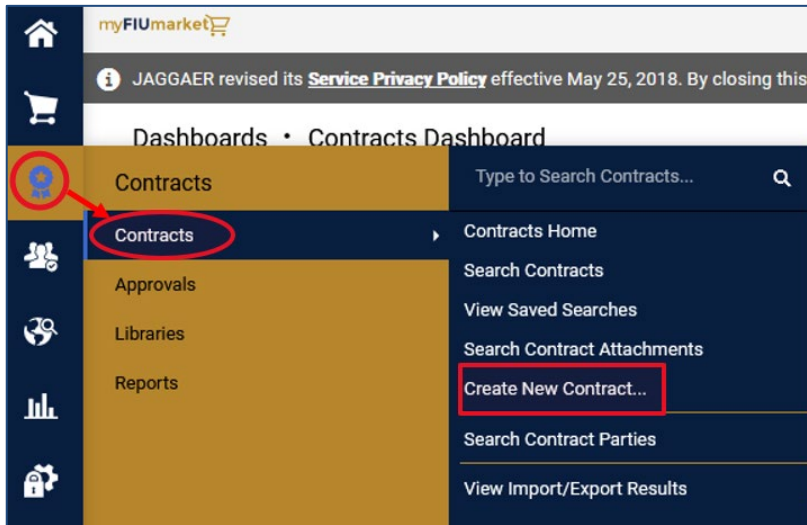
Looking for this contract exported as a PDF? [Go to View Exports...](#)

General (1) Internal Only (0) Obligations (0)

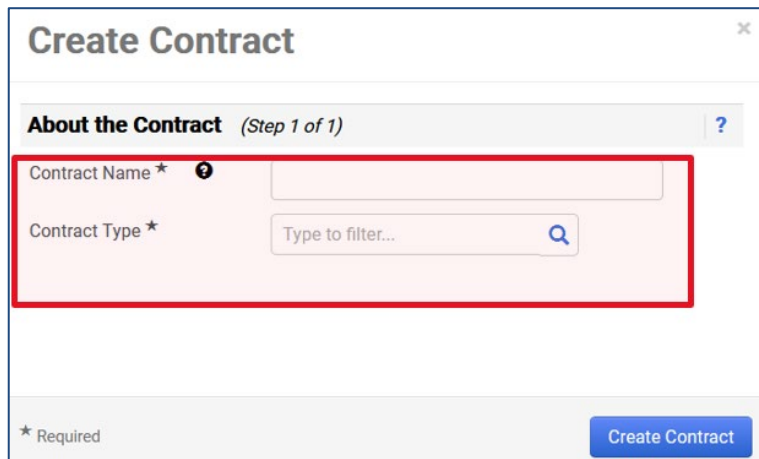
NOTE: Help notes are often available via the question mark  or the information  symbols and can provide guidance on business policies and processes.

12. Creating a New Contract

- a. The link to create a new contract is found through the **Contracts** icon within the left-hand navigation bar.



- b. On **Step 1 of 1** of the **About the Contract** screen, enter all required (*) fields:
 - **Contract Name** – Enter a contract name that is clear and concise and that will be easy and helpful in searching for the contract in the future.
 - **Contract Type** – Click within the box to view selections or type the desired selection within the box.

A screenshot of the 'Create Contract' form. The title is 'Create Contract' with a close button (X). Below the title is a section titled 'About the Contract (Step 1 of 1)' with a help icon (?). The form contains two required fields: 'Contract Name *' and 'Contract Type *'. Both fields are highlighted with a red box. The 'Contract Name' field is a text input, and the 'Contract Type' field is a search input with a magnifying glass icon. At the bottom left, there is a legend: '* Required'. At the bottom right, there is a blue button labeled 'Create Contract'.

- c. Select the required **Contract Type**. In this case select **Service Entertainment Performance Agreement**.

Create Contract [Close]

About the Contract (Step 1 of 1) [Help]

Contract Name * ⓘ Armani Test 3

Contract Type *
Type to filter... [Search]

- Independent Contractor Agreement
In: FIU > Purchasing > Independent Contractor Agreement
- Purchase of Goods or Services
In: FIU > Purchasing > Purchase of Goods or Services
- Services Entertainment Performance Agreement**
In: FIU > Purchasing > Services Entertainment Performance Agreement

* Required

Create Contract

- d. Since Service Entertainment Performance was selected as the Contract Type, the Contract Template field should automatically populate as the same (Service Entertainment Performance). Select **Service Entertainment Performance Agreement** as the **Main Document Template**. Select **Create Contract**.

Create Contract [Close]

About the Contract (Step 1 of 1) [Help]

Contract Name * ⓘ test

Contract Type *
Services Entertainment Performance Agreement [Remove] [Search]

Use Contract Template Yes No

Contract Template *
Services/Entertainment /Performance Agreement [Remove] [Search]

Work Group *
Procurement FIU [Remove] [Search]

Main Document Template
Services Entertainment Performance Agreement [Remove] [Search]

* Required

Create Contract

13. Contract Header

Follow **Step 2** above.

14. Contract Compliance Questions

Follow **Step 3** above.

15. FIU Template Questions (for Service/Entertainment/Performance Agreement)

- a. Enter the responsible FIU department's name.
- b. Enter the Scope of Work – the Scope of Work
- c. Enter the Supplier ID
- d. Enter the Supplier's address.
- e. Click on **Add New Table** - Enter the date, time, and length of the performance.
 - i. Additional tables can be added if needed.
- f. Select whether the Total cost is a **Fixed Fee** or **Not to Exceed Payment** amount.
 - i. If **Not to Exceed** is selected, a payment calculation is required.
 - ii. If Yes, a description of expenses is required.
- g. Will FIU compensate vendor for expenses?
 - i. Select Yes or No
- h. Enter Payee name only if different than the Supplier's name. If inapplicable type N/A
- i. Enter Special Payment Term. If inapplicable type N/A
- j. Equipment and/or Personnel made available for Performance.
 - i. Detail any equipment that FIU must to provide to the Supplier for the Supplier's performance of the Services. If inapplicable, type N/A
- k. Enter FIU Contact Name

- l. Enter FIU Contact Address
- m. Enter FIU Phone Number
- n. Enter FIU Contact Email

FIU Template Questions

a On Behalf Of (FIU) * ⓘ

b Scope of Work
2000 characters remaining

c Supplier ID *

d On-Premises Location *
2000 characters remaining

e **Performance Date and Time table (0)**
Add New Item
This table is currently empty. [View Table Columns](#)

f Fixed Fee or Not to exceed payment * Fixed Fee Not to Exceed Payment

g Will FIU compensate vendor for expenses * Yes No

h Payee *

i Special Payment Terms * ⓘ

j Equipment and/or Personnel made available for Performance ⓘ
2000 characters remaining

k FIU Contact Name *

l FIU Contact Address *

m FIU Contact Phone *

n FIU Contact Email *

16. Alternate Language

There is no action to be taken here. Please advance to the **Next** item.



17. Attachments

Follow **Step 6** above.

18. Obligations

There is no action to be taken here. Please advance to the **Next** item

19. Follow **Step 8** to **Step 12** above.

NOTE: Help notes are often available via the question mark  or the information  symbols and can provide guidance on business policies and processes.