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.

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

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**.
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.
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.

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

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.
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.

   ![Attachments section](image)

   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 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 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.

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

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**.
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
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 (i) symbols and can provide guidance on business policies and processes.