Contract and Agreement Routing (CAR) Instruction Sheet

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

- Complete the date, the name of the requester, and the email address of the person that you would like the contract emailed back to. New: All contracts will be emailed back to the requestor; hard copies will no longer be returned.

- 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) sheet along with the contract/agreement.

- Identify the funding source for the services that will be performed, and include the total dollar amount that will be paid to the contractor. Obtain the required signature(s) of those authorized to sign on the indicated GLs.

- Note: 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 Sindic, and the amount is over $1,000, the CAR sheet must also be signed by the Dean of SOLA, or the VP for Graduate Programs.

- If the total is over $3,000, your Department must obtain all additional appropriate signatures within your area.

Step 2 – Identify type of service, when will be performed/completed and payment requirements.

- Select the specific agreement required, based on the type of service that Saint Mary’s will be receiving. Please use the key below to determine which agreement must be completed.

  - Speaker: Agreement for use with Guest Speakers and Artist
  - Performer/Artist: Agreement for use with Guest Speakers and Artist
  - All other services (e.g. consulting, photography, catering, etc): Independent Contractor Agreement.
  - Note: for catering agreements, the Agreement Waive Food Liability and Provide Indemnification Form, and the Food Handling Guidelines Form must also be completed and included with the contract.

- If this is an agreement renewal, please include a copy of the prior year agreement.

- Next indicate when services will begin and when the services will be completed or when the finished product will be delivered.

- Indicate the payment schedule: if there is a deposit amount, and when payment is due. Indicate the final payment amount, and when payment is due.

- Finally, indicate the preferred payment method. New: Please note that the entire contract amount must be paid by one method only (e.g. 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. Please see instructions below on how to complete this request.
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• Payment is due now, please go ahead and process payment. If you are ready to make payment at the time the contract is executed, please be sure to include the payment request with the contract. The Business Office 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. Since the Business Office is aware that there is an agreement in place via the CAR #, the payment can be made on an individual P Card. Purchasing will open up the individual P Card to allow the charge. Please note that services can only be placed on a P Card if we are aware of the contract, and this form is completed.

• Once you have completed Steps 1 and 2, attach the CAR sheet to the contract/agreement that has been signed by your vendor and deliver to Purchasing for processing. New: Please note that only one copy of the contract is required. We no longer require two signed copies.

Step 3 – To be completed by Purchasing Department.

• Once your agreement has been processed by the Business Office, the fully executed agreement and a copy of the CAR sheet 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 number (PO #) was issued.

• The following requirements must be met in order for a PO # to be issued:
  • If the amount is over $3,000 and services will be performed at least 30 days out, the funds will be encumbered to the general ledger account indicated.

• How to initiate the payment request for services performed under the contract:
  • Once you are ready to make payment, complete a Check Request. New: You no longer need to attach a copy of the agreement; however, on the request, please indicate the CAR # that was provided. 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. Submit your Check Request 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 sheet, please contact Purchasing at x4916.