



Saint Mary's College of California Contract Approval Routing (CAR) Form Instructions

Please allow 7 to 10 business days for processing.
All sections must be completed. Incomplete CAR forms will result in processing delays.

Purpose of the CAR form

The CAR form is an internal document used in conjunction with an agreement that provides concise information about the contract or agreement and is a necessary document to show that appropriate signatories and delegated signature authority officials have reviewed and approved the contract or agreement.

When to use this Form

This Contract Approval Routing Form is to be used for routing contracts for appropriate review and approval **PRIOR TO** the procurement of equipment, equipment leases, equipment evaluation contracts, goods and services (e.g., maintenance, consultants, contractors, professional trades, speakers), and all associated confidentiality agreements.

Departments are strongly encouraged to use this form for any general procurement contract or lease that requires external review or approval. Completed forms will be archived along with the associated contract.

How to use this Form

This form is an interactive PDF form that allows you to fill in your information online and maintain an electronic file for your records. This form is located on the SMC portal in the Accounts Payable Frequently Accessed Forms, Policies and Procedures section.

The following sections are to be completed by the initiating department:

Requesting Department:

1. Enter the name of the department entering into the contract or agreement.
2. Enter the name of the Contact Person or Contract Liaison.
3. Enter the email and telephone extension of the person listed. The person listed in this section is who the Business Office will contact and/or send correspondence to regarding the contract.

Contractor/Company Information:

1. **Name of Payee:** Enter the full name of the facility/company/university/business/vendor to which SMC is entering a contract. For IRS reporting purposes, please verify that the name on the CAR form matches the name on the W9.
2. **Contact Person:** If contact person differs from name of payee, enter contact name, Email and phone number. If contact is same as payee, enter payee Email and phone number.
3. **Non-California resident?** If the payee is an individual, corporation or partnership that does not reside or have a place of business in California, check the yes box. Any payments in excess of \$1,500 require the completion of form 590 or 587. Both forms should be provided to the vendor for their determination of which is applicable. These forms are located in the portal on the Frequently Accessed Forms page. If necessary, please contact Gary Stewart in the Business Office for further clarification. If the no box is checked, no further action is required.

Contract Description/Information:

1. **Purpose of Contract:** Enter a brief description of the subject content included in the contract or agreement and any commercial, technical or legal issues that need to be addressed or approved.
2. **Term of Contract:** Enter the date the contract starts or becomes effective and the end date of the contract (if applicable).
3. **Contract Amount:** Enter the total contract amount; if a deposit is required, enter the deposit amount; enter the final payment (total contract amount less deposit).
4. **Funding Source:** Enter the GL code to which the funds will be expensed against. Please check the balance in the GL to ensure funds are available. Check the Revenue Generating box if the contract or agreement will generate revenue for SMC (**UBIT check boxes are for Business Office purposes only. Do not check the y or n boxes**); check the Zero Funding box if the contract or agreement has no dollar affect for SMC; check the Pay With My PCard box if payee will accept PCard payment (**Note: once the PCard payment option has been selected, all subsequent payments should be paid by PCard**); check the Payment Request box if payment will be issued by check via Accounts Payable. You have the option to attach the check request or submit it to Accounts Payable at a later date.

Attachment Check List:

1. Check the box that applies and include the applicable form with the contract or agreement.
 - a. W-9 Request for taxpayer Identification number- This is an IRS form that is required to create a vendor in the accounting system. It is necessary to ensure the accurate reporting of payments to vendors.
 - b. Insurance Certificate- This is a vendor provided form to ensure the vendor has appropriate insurance coverage in the event of an unforeseen accident while providing services to SMC. This form must be included with the CAR form.
 - c. Form 590 or 587-This is a California State tax form that requires SMC to withhold and report 7% of the payments to vendors who performs work in California, but does not reside or have a place of business in California.
 - d. Food Waiver Liability Form-This form is required for non-Sodexo vendors who provide food services to SMC for on and off campus events. For off-campus events, the Food Handling Guidelines form must be signed by the vendor. For on-campus events, the Food Handling Guidelines and the Food Waiver form must be completed and signed by the vendor. **The forms must be completed prior to the commencement of the service.**

Contract Certification and Approvals:

1. Authorized approver (includes authority for GL funding) from the originating department who has the authority to make decisions for the department, should review and certify the contract or agreement by printing and signing his/her name.
2. Additional approvers may be necessary based on authorized approver's approval limits.

To Be Completed By The Business Office:

Once the CAR form is reviewed and all approvals are obtained, the requesting department will forward the CAR and all pertinent documents to Ann Tomaselli amt19@stmarys-ca.edu in the business office for review and approval. Ann Tomaselli will contact the requesting department if additional information is needed.

Once the agreement has been approved, Ann Tomaselli will email a copy of the CAR and signed agreement to the requestor. The CAR form will include a CAR number that should be included with all payment requests.