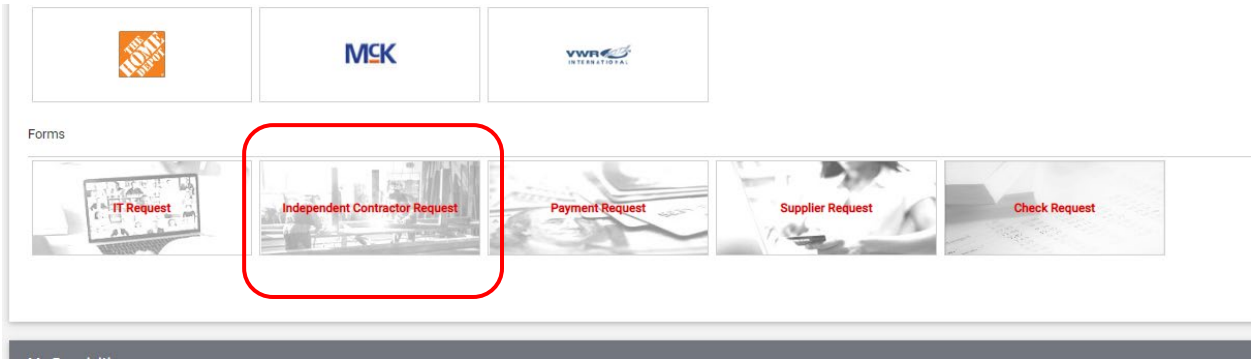
Jaggaer eProcurement System: Process Guides

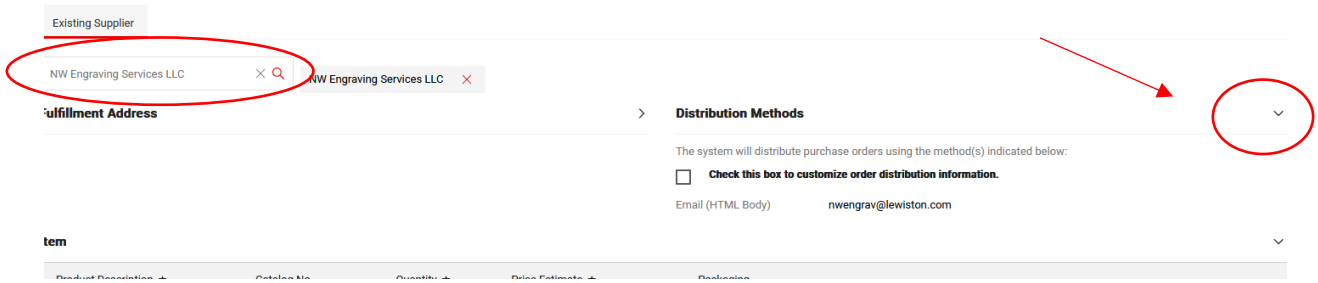
How to enter an Independent Contractor Payment (ICP) Request

Overview: Users with a Requester role have access to enter a request for an ICP. The request must be entered and approved prior to the contractor performing services. The Object code 5-5199 must be used for ICP requests. Using the correct Object code is critical to ensure accurate financial records.

1. Navigate to the Jaggaer site.
2. In the Forms section, select the Independent Contractor Request button.

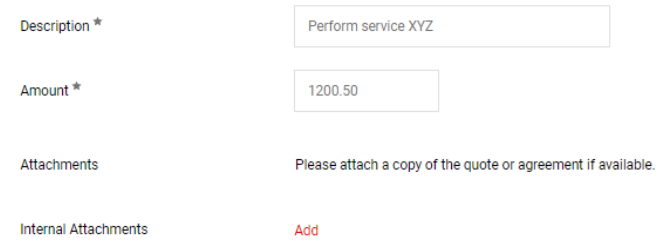


3. Enter the Independent Contractor name into the **Existing Supplier** field to search. Select the supplier. Click the arrow next to **the Distribution Methods** to ensure the supplier has an email address. This step is key as Jaggaer will automatically email the PO to the supplier.

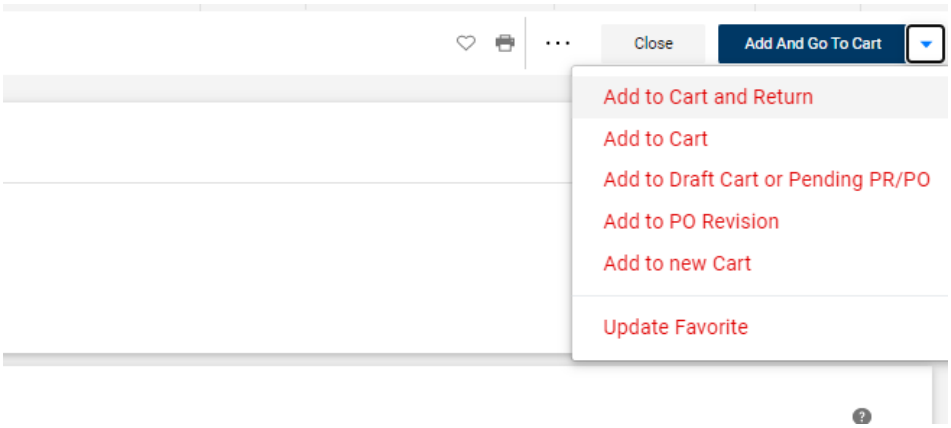


   a. If the supplier does not have an email in their record, and you know the email address, click on the checkbox next to "**Check this box to customize order distribution information"** and enter the email.
   b. If the supplier does not have an email in their record, and you do not know the email address, leave the email field blank and the Purchasing Department will research and update the supplier record.

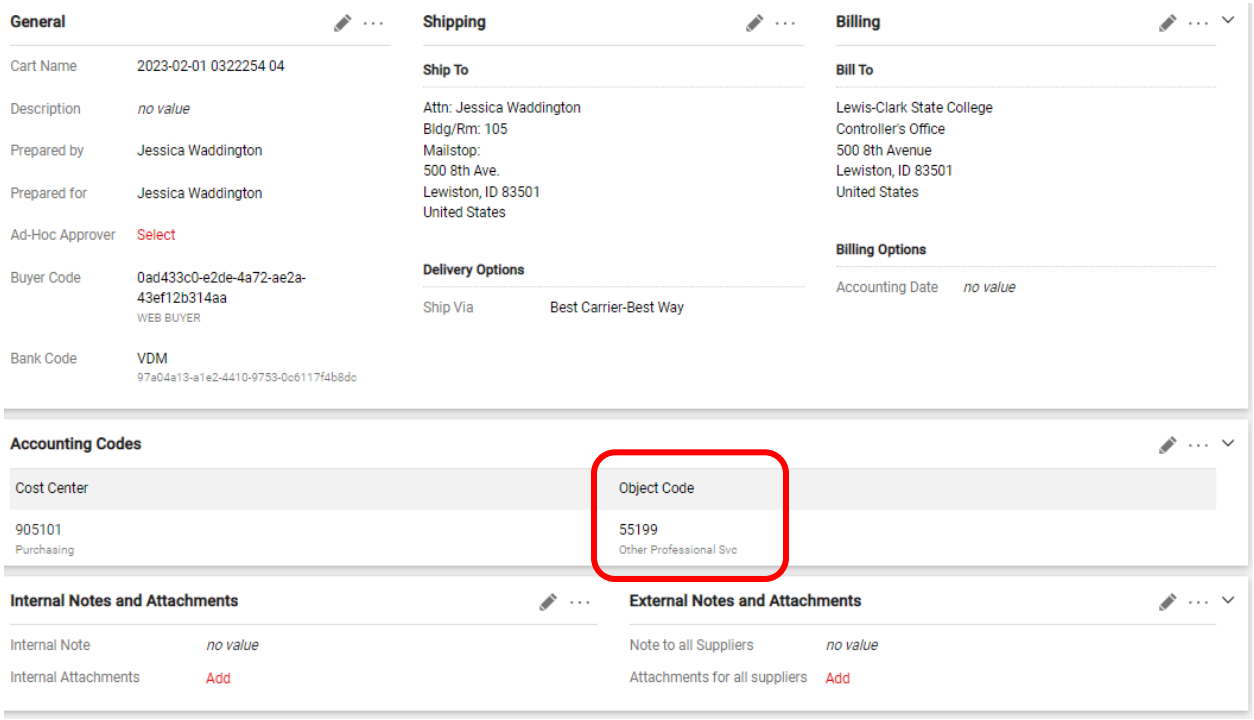
4. Enter the description of the service to be performed, the dollar amount, and attach any applicable documentation.



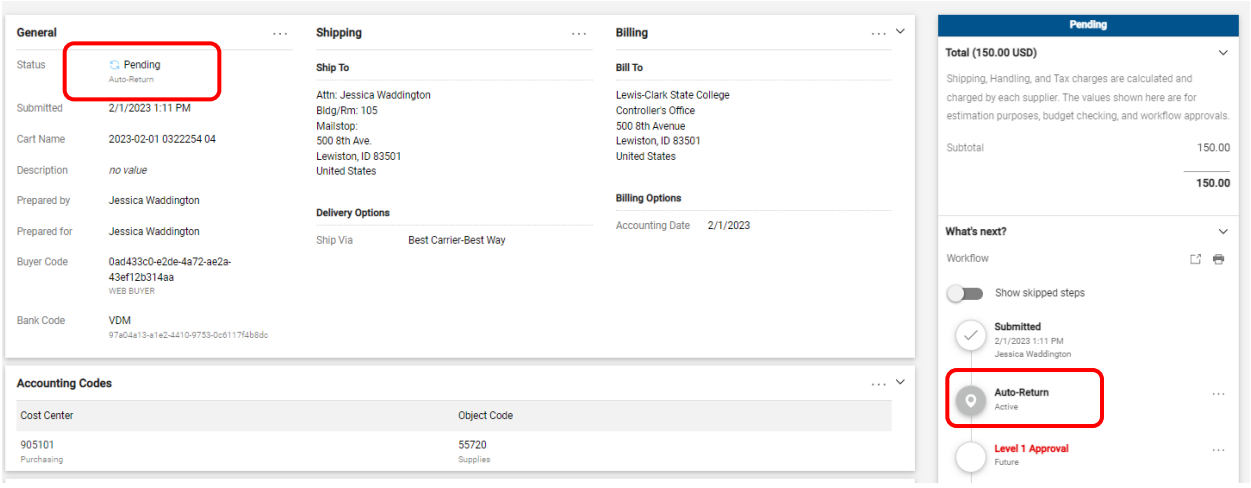
5. If there is only 1 line to add, click the **Add and Go to Cart** button. If additional lines need to be added, click the down arrow next to the **Add and Go to Cart** button, then select **Add to Cart and Return**.



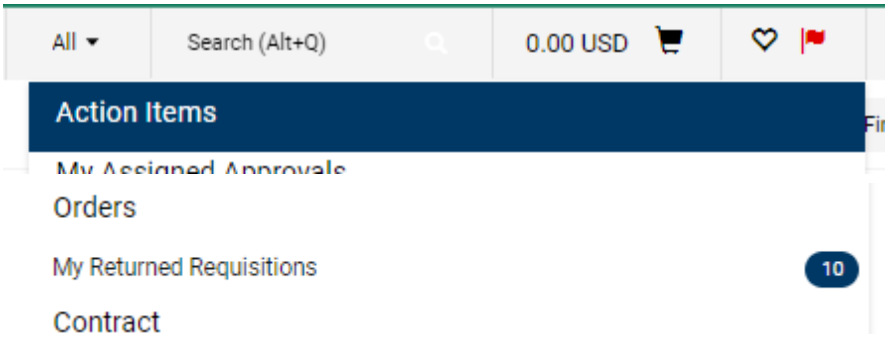
6. Once all of the lines have been added, click the Proceed to Checkout.
7. In the Checkout screen, the following information can be reviewed and updated if needed. Click on the pencil icon to edit.
    a. Shipping – Ship To address can be updated to the appropriate campus location
    b. Accounting Codes – Cost center and Object code can be edited at the entire cart level, or on each line item.
    c. **The Object code 5-5199 MUST be used for Independent Contractor Payment requests.**
        i. **If this Object code is not used, the requisition will be returned to the requester for correction, and will not move forward in the approval workflow.**
    d. Internal Notes and Attachments – Add an internal note and any attachments, if needed. Internal Notes will appear in the approval email sent to the next level approvers.



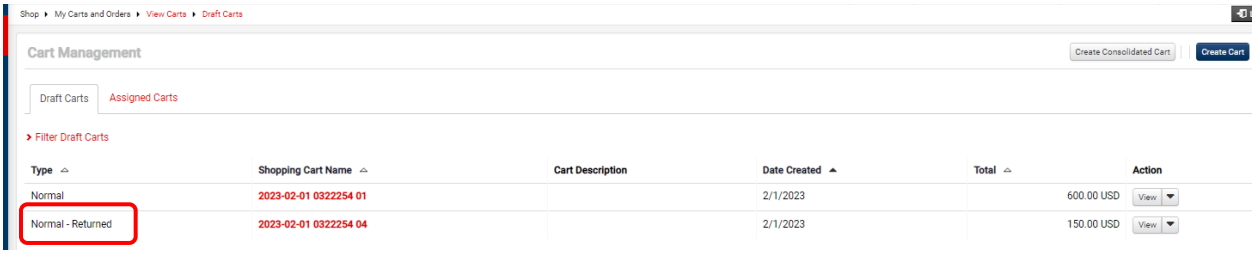
8. Once the order has been reviewed and any updates made, the Requester clicks on the Place Order button. If any Object code except 55199 was used, the requisition will automatically route back to the requester, and the status will show as **Pending** in **Auto-Return**.



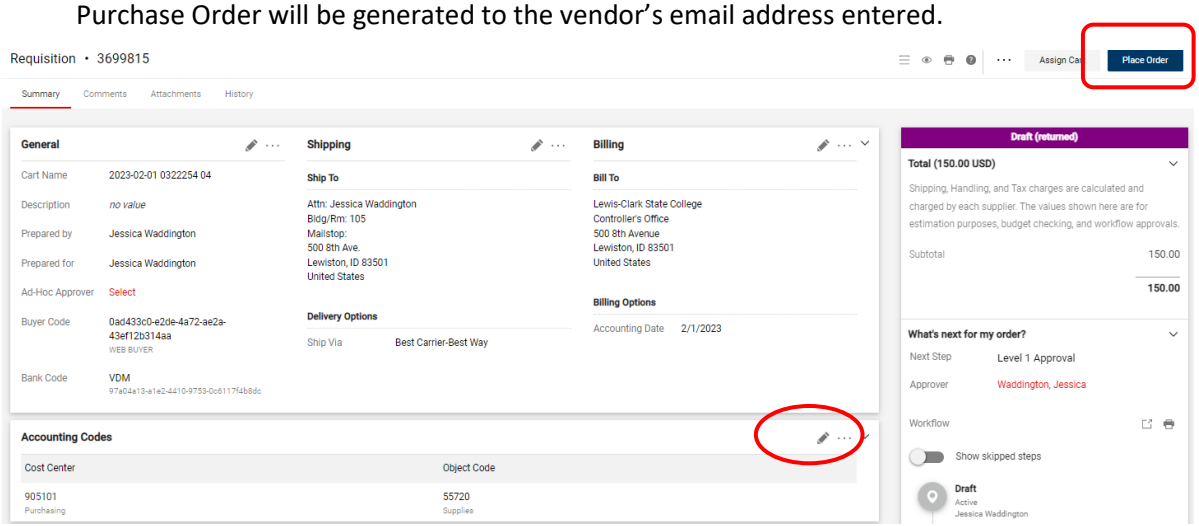
9. The requisition will be displayed under My Returned Requisitions in the **Action Item** flag at the top right of the Jaggaer screen.



10. The requisition can be accessed by clicking on the My Returned Requisitions link in the Action Item flag section.
11. The Cart Management section will open, and the requester will click on the returned Shopping Cart Name link to open the requisition for edits.



12. The requester will edit the Object code by clicking on the pencil icon in the Accounting Codes section and entering the correct Object code. Once corrected, the requester will click the Place Order button. The requisition will route to the Next level approver. Once fully approved, a Purchase Order will be generated to the vendor's email address entered.



13. When the services have been rendered, enter a receipt on the PO.
14. Follow the How to Enter Receipts process guide on the Jaggaer Resource site.
    a. If you have received the invoice from the Independent Contractor, upload it to the attachment section of the receipt. Do not email or send through campus mail.