Using the Contracted Services Form for U.S. Residents

To make payments to U.S. resident independent contractor individuals, submit a completed and signed *Contracted Services Form for U.S. Residents* to Accounts Payable with the invoice and all pertinent documentation. Before submitting the Contracted Services Form, the department/school may need to add the contractor as a vendor.

- If applicable, a completed *Visitor's Expense Report* documenting pre-approved expenses must accompany the *Contracted Services form*.
- For further information about the *Contracted Services Form for U.S. Residents*, go to: [http://www.northwestern.edu/finsys/ps/purchasing/purchasingpaymentother.html#US](http://www.northwestern.edu/finsys/ps/purchasing/purchasingpaymentother.html#US)
- For information about the *Non-U.S. Resident Independent Contractor Payments to Individuals*, go to: [http://www.northwestern.edu/finsys/ps/purchasing/purchasingpaymentother.html#nontravelnonemp](http://www.northwestern.edu/finsys/ps/purchasing/purchasingpaymentother.html#nontravelnonemp)

**Navigation:** The form is located on the Financial Policies and Procedures web site: [http://www.northwestern.edu/finsys/ps/forms/contractedservices.pdf](http://www.northwestern.edu/finsys/ps/forms/contractedservices.pdf)

**Note:** Each time you open this form, a unique identifying number is assigned to the Contracted Services Form for U.S. Residents as the Request number. Mac users should be sure that a bar code appears. If not, call 1-HELP, option 2.

**Step 1:** Complete ALL Contracted Services form fields

A. Complete Requestor contact information.

B. The **Dept Code** is the 3-letter code identifying the department and should be entered in CAPS. This code will be included in the form identifying number automatically. List of department codes: [http://www.northwestern.edu/finsys/ps/forms/DeptCodeLookup.pdf](http://www.northwestern.edu/finsys/ps/forms/DeptCodeLookup.pdf).

C. The **Vendor ID** field information is found in NUFinancials → Vendors → Vendors Information → Review Vendors or by using the Cognos SC014 Vendor Info Query.

D. Select **Check Handling**.

E. Enter Contractor information.

F. Obtain Contractor's signature.

G. Enter services expense information including expenses from Visitor's Expense Report if applicable and chart string.

H. Submit for signature for all levels of approval.

**Step 2:** Print form, submit for signatures for all applicable approval levels, attach original documentation, and submit to Accounts Payable.
What Happens Next?

- Accounts Payable receives and enters the Contracted Services Form for U.S. Residents into NUFinancials.
- The Requester receives an e-mail with a link to the Voucher Entry.

OR the Requester can find the Voucher Entry in the system: from NUFinancials→Accounts Payable→Vouchers→Add/Update→Regular Entry→Find Existing Value

- In the Voucher Entry page, there are tabs along the top to give all information related to the voucher, including payment information. The payment is mailed to the address on the Payments tab.
- The voucher number, not the form number, is used to track payment in the NUFinancials system.

Note: If you want to retain an electronic copy of the Contracted Services form, you can print and scan the completed form back into your computer, thus retaining the unique identifying number or you can set the Zoom feature at a percentage so as to capture the full form and select Ctrl+PrntScrn (or Ctrl+F14 for Mac) and paste in Word document.