

SUBMITTING A CONTRACT IN CMM

What to gather before you get started:

- Name, email address, and mailing address for the person (or company) we are contracting
 - What type of service, performance, etc. are they performing?
 - Does it require a Certificate of Insurance (i.e. are they performing work on WWU campus premises)? If so, let them know that we require one sent in to our office:
 - Contract Administration Office/Western Washington University
 - Business Services
 - 516 High St., MS-1420 Bellingham, WA 98225
 - What are the date/dates of the contract?
 - Is it a one-day performance?
 - Does it take place over a few days, weeks, months?
 - What is the cost of the service, performance, etc.?
 - Is it a one-time payment?
 - Will there be an itemized list of payments? (i.e. for ongoing service work)
 - Is the contract over multiple payment terms (multiple-payments)?
- IMPORTANT NOTE: HONORARIUM MEANS SOMETHING DIFFERENT IN THE CONTRACTING WORLD – IT MEANS NO PAYMENT NECESSARY**
- Are we paying any travel expenses?
 - Hotel, airfare, meals, etc.
 - Per diem reimbursement or are we adding it into the overall cost? (meaning it won't be separated from the overall contract cost)

YOUR MOST IMPORTANT BUTTON IS THE “SAVE AS DRAFT”!

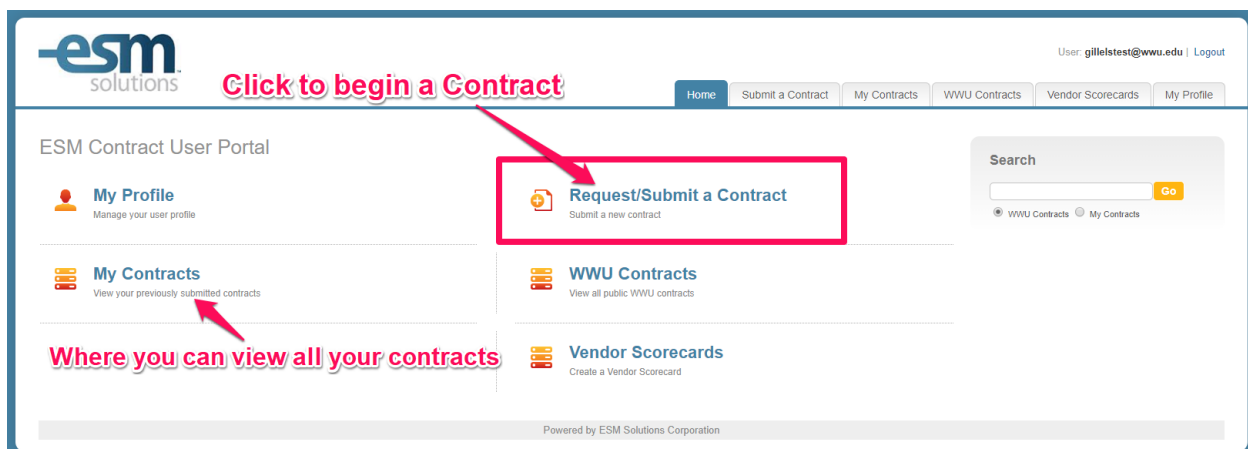
Use this all the time – do NOT use “Save” until you are ready to submit



The following pages provide a breakdown step-by-step of the process and each tab you need to fill out.

Your first step is to log into the CMM System via the MyWestern link or on our website here:

<https://www.wvu.edu/bservices/contracts/cmm.shtml>, then click “Request/Submit a Contract”





Contract Details Tab 1

The first tab you need to fill out is the “Contract Details” tab. This is where you will fill out who the contract owner is, provide a descriptive title and scope of work, fill in the contracting party details, and outline the payment and travel costs.

Fill in the Contract Owner details. This is the Department and Person who is ultimately responsible for this contract.

The Title and Description/Scope should be specific and contain all of the details necessary to understand the work that is being performed or the service provided. Please put as much detail as possible in this area.



Next you will fill in the individual or company's details. Use the spyglass to search and see if they are already set up in our system.

If they are not, we require a New Vendor Setup so we can assign them a W# for payment processing.

Then fill in the Contract Start and Contract End dates. These cover the period that work is performed or a service is given. If a single date of performance, the start and end dates can be the same.

For Renewal Type, you should choose either "None" (if a one-time service/event/etc.) or "Manual Renewal". We no longer accept Automatic Renewals.

Submit a Contract

Click the spyglass to search and see if they are already set up as a vendor in our system

Fill in all the person or company's details

Start Date is when the work will begin and End Date is the last work day or date the contract will expire

Performances/etc. are most often "NONE"
If renewals are available, use 'Manual Renewal'

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The final part of Tab 1 Contract Details is where you will fill in the costing. How much they contractor will be paid for the service, how they are being paid (i.e. Check Request), and if there is any travel associated with the contract. If yes to travel, more options will appear for you to add in greater detail.

There is also room to add in additional funding or payment information, for example if you are splitting the cost between Chart 1 and Chart 2 funds.

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User: gilleltest@wwu.edu | Logout

Home Submit a Contract My Contracts WWU Contracts Vendor Scorecards My Profile

Submit a Contract

Contract

Save Cancel 1. Contract Details 2. Compliance 3. Documents 4. Approvals 5. Emails 6. Related Contracts

Cost for Goods and Services

*Cost Type: Expense

*Payment Structure: [dropdown]

*Annual Cost: \$ [input] *Total cost over entire Term of Contract: \$ [input]

*Method of Payment: [dropdown]

Chart: Choose one Org Code: [input]

Additional Payment Terms/Funding Info, including Split Funding: [text area] Add any additional payment/funding notes here

Cost for Travel / Accommodations / Meals

Travel?: ☒ Yes ☐ No Travel Expenses Detail: [input]

*Authorized travel includes: ☐ Per diem lodging ☐ Mileage ☐ Per diem Meals ☐ Airfare ☐ Ground Transportation ☐ Exempt from per diem limits (Chart #2 funds)

*Travel Not to Exceed: \$ [input] If yes to Travel, fill out what we are including in the contract as well as the "Not to Exceed" limit

Additional Contract Information or Instructions

Please Provide Additional Information: [text area]

Contract Requester Information

Submitter Name: Shawna Test Gilleland Test Submitter ID: 25263

Submitter Email: gilleltest@wwu.edu Submitter Phone: [input]

Submitter Division Title: Academic Affairs

Submitter Link Title: [input]

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That completes Tab 1.

Click Save as Draft.

Save as Draft



Compliance Tab 2

The second tab is solely focused on compliance. Check any box which may arise during the contract. This is a requirement so we can know where we may need to bring in additional review or ask for specific documents from the contractor.

Contract

Save Cancel 1. Contract Detail 2. Compliance Documents 4. Approvals 5. Emails 6. Related Contracts << >>

Collapse All Save as Draft

ID: 2380

*Record Type: Contract

Contract Visibility: Private

*WWU or Contractor's Form?: ☐ Western Document ☐ Contractor Document

Contract Unit: College of Fine and Performing Arts Contract Unit Code: 4200

Contract Department: Contract Department Code:

Contract Owner/Financial Manager: Contract Owner/Financial Manager ID:

Contract Owner/Financial Manager Email: Contract Owner/Financial Manager Direct Phone:

Clone Contract

Compliance Information

Please mark the boxes below indicating which, if any, of the compliance areas have been involved in your contract review.

If your contract involves items listed you are required to review the contract with the appropriate University compliance owner. Click this [link](#) for more information on these compliance review elements.

*Compliance Review:

<input type="checkbox"/> Personal Health Information (e.g. HIPAA)	<input type="checkbox"/> Student Educational Records (e.g. FERPA)	<input type="checkbox"/> Personal Financial Information (e.g. credit cards) Cash Handling
<input type="checkbox"/> Hazardous Materials	<input type="checkbox"/> Children/Minors on and off campus	<input type="checkbox"/> Serving Alcohol
<input type="checkbox"/> Special Event Stakeholder Review	<input type="checkbox"/> Conflict of Interest review or Disclosure	<input type="checkbox"/> Use of a Non-State Facility Space
<input type="checkbox"/> Potential Prevailing Wage requirements	<input type="checkbox"/> Work will not violate WWU union agreements	<input type="checkbox"/> Use of Human Participants or Subjects
<input type="checkbox"/> Intellectual Property	<input type="checkbox"/> Copyright or Patents	<input type="checkbox"/> Use of University Logos and Trademarks by Contractor
<input type="checkbox"/> Purchase of a Controlled or Prohibited Item	<input type="checkbox"/> Non-Disclosure or Confidentiality requirement	<input type="checkbox"/> Potential permanent utilization of WWU space
<input type="checkbox"/> Current/Former Employee	<input type="checkbox"/> Accessible Technology	<input type="checkbox"/> None

Compliance Review Notes:

Please note if there are any of these issues or points which may arise from the contract



Documents Tab 3

This final tab is where you will either create the contract on one of Western's approved templates or upload any documentation provided from the contractor.

If we are creating the contract document (the preferred method), choose the contract type from the dropdown menu then click on Create Document from Template. This will pull the information from Tab 1 into an approved template.

If you have a document from the contractor, at the bottom of tab 3 there is a New button. Click that to open a new window where you can choose the type of document you are adding, write a descriptive title for it, then attach the document. Once attached, you can hit Save to be directed back to the Documents Tab.

Document

Save Cancel Document Contract Info << >>

[Collapse All](#)

ID: 1099

Contract Title:

Document Type: Drafts

*Document Name: Example Document Title Here

Attached File: Drag&Drop files

Include in Approval Packet: Yes

[Notes](#)

Notes:

If all of your documents and information are in order, click on Save as Draft one last time. Then near the bottom of Tab 3 you will see a green button labeled "Submit". Click on this button to send your contract to the Contract Administration team for review.

IMPORTANT NOTE: Once you click Save or Submit, you can no longer edit your documents so always use the Save as Draft button.

Status: Contract #2380 successfully updated.

Contract: Descriptive Title Here for Performance Date

Save Cancel 1. Contract Details 2. Compliance 3. Documents Approvals 5. Emails 6. Related Contracts 7. History << >>

ID: 2380 Status: Draft

*Record Type: Contract

Contract Visibility: Public

*WWU or Contractor's Form?: ☒ Western Document ☐ Contractor Document

Contract Unit: College of Fine and Performing Arts

Contract Department: Music Department

Contract Owner/Financial Manager: Patrick Roulet

Contract Owner/Financial Manager Email:

Contract Unit Code: 4200

Contract Department Code: 4240

Contract Owner/Financial Manager ID: 24673

Contract Owner/Financial Manager Direct Phone: 360-650-3394

Clone Contract

Contract Type and Template Information

Contract Type: [Dropdown]

Document Template Title: [Dropdown]

Create Document from Template

Contract Documents

Once uploads are complete be sure and select the Submit Button

Submit

Documents:

Select New to upload vendor contracts, attachments, exhibits, riders that are part of the contract or documents required to be submitted with the contract. Do Not Attach W-S's or SSN number info.

Status: No records.

New

If we are generating the contract document, you can choose which template to use and generate it here

Once you are happy with the information, click "SUBMIT" to send to Contract Admin

If you have received a document from the contractor, you can add it here