



# Scope of Work (SOW) Instructions

For any service provider doing business under their social security number, a Scope of Work/ Independent Contractor form must be completed and approved by Employee Services. This should happen before the service provider completes any work.

Complete instructions on the SOW process are located at

<https://www.cu.edu/employee-services/collaborative-hr-services/cu-campuses/scope-work-sowindependent-contractor>

To begin completing the online SOW Form, follow the above link, scroll down to the “Start a Scope of Work form” button, and click on it. The form will take 10-15 minutes to fill out and must be completed in one sitting. Below is supplemental information to help you complete the form. **All fields on the form with asterisks must be completed.**

## CU Contact Information

1. Department – Environmental Studies
2. Department Number – 10169
3. Are you the same person who will approve this SOW request – YES

## Service Provider Information

4. Name (first and last)
5. Email
6. The other information should be filled out by the service provider once form is routed to them for signature

## Proposed Work Information

7. Provide detailed information about the work to be performed or SOW will be returned to you

## Payment Details

8. Contract begin and end dates must be within the period of performance
9. Total amount must include any covered travel-related expenses - it's prohibited to use other, separate procurement methods (Procurement Card, Travel Card, Marketplace Purchase Order, or Non-Employee Reimbursement form) to cover travel costs for the independent contractor - all covered travel expenses must be detailed on invoices

## Internal Revenue Service Classification Factors Checklist

10. Your answers to these questions will determine if the service provider can be classified as an independent contractor or must instead be classified as an employee (see <https://www.irs.gov/taxtopics/tc762> for more information)



## Service Provider Certification/Authorizations

11. Authorizing name should auto-populate
12. Fill in "Org Unit Authorizing Title" (i.e. Professor, Assistant Professor, Research Associate, etc.)
13. Click the "Submit" button

## Routing for Signatures/Approvals

14. Service Provider Certification (at this step the service provider should add their personal information)
15. Organizational Unit Certification (the SOW requestor should provide this certification)
16. Employee Services Approval

## Next Steps: Purchase Order and Invoicing

This Employee Services approval process can take up to 7 business days. Once Employee Services approves the SOW form, you'll receive a copy with all required signatures. Forward a copy of this document to [lisa.forman@colorado.edu](mailto:lisa.forman@colorado.edu).

Lisa will then determine if a Purchase Order (PO) needs to be created and initiate the PO requisition process. Do not authorize the service provider to perform any work until Lisa provides you with a PO number or tells you that no PO is needed.

The independent contractor must send you an invoice when payment is due. Once you receive and approve an invoice for payment (verifying that the work detailed on the invoice is complete), forward the invoice to [lisa.forman@colorado.edu](mailto:lisa.forman@colorado.edu) for processing.

Invoices must be legible and include the following or Accounts Payable will not process payment:

- The purchase order # (if applicable)
- The supplier name and remit to address
- The name of the university and department receiving the goods or services
- A detailed description of the goods or services
- The date the goods or services were provided
- The total amount owed for this invoice
- An invoice number, unique from all others from the supplier