Requester – Logging In

1. How to get to Independent Contractor/Employee web form
   a. Visit website for extra information and documents
      http://www.creighton.edu/hr/contractorpolicies/index.php
   b. Open Link below to begin Creating/Reviewing Requests

2. Log in using your Net ID as the Username and Blue Password.

3. You will be directed to the Home Screen as seen below.

4. Click on the “Requests” tab to create a new request or view previous requests made.
Requester – Create New Request

*All fields noted with a red asterisk "*" are required*

1. **Click on “Add Request”**

2. **Enter Requester Information:**
   
   ![Requester Info Image]

   a. “Requester Net ID” Auto Populated
   b. “Requester Name” Required Field
   c. “Requestor Email” Auto Populated
   d. “Requester Phone” Ex: 402-280-XXXX

3. **Enter Payee Information:**
   
   a. “Payee Name” Ex: John A. Doe
   b. “Payee Net ID” and “Payee @number” (Optional)
      
      ![Payee Info Image]
   
      i. Information found in BANNER http://banprod.creighton.edu/
      ii. @Number allows us to skip further steps if
   
   c. “Description of Work Being Preformed” (Required)
      
      ![Description of Work Being Performed Image]
   
      i. Click inside the text box
      ii. Type the description of work being performed (500 characters max)
iii. The Text box can be enlarged
   1. Place cursor on bottom right corner of text box circled in red (shown above)
   2. Click and hold mouse button
   3. Drag the Text Box to your liking

d. Select the type of service in the “Is the Service one of the following” field

   * Is the service one of the following:

   - Honorarium/Guest Speaker
   - Proctor
   - Preceptor if paid through a company
   - Entertainer
   - Athletic Official
   - Standardized Patient/Stipend for research participation
   - None of the above
   - TRIO Program

   i. Click on Drop down arrow
   ii. Select option that best applies from drop down list
   iii. After your selection is made, the CUBuyplus Information appears

4. CUBuyplus Information:

   - Remit To Address
   - * Line 1
   - Line 2
   - Line 3
   - * City
   - * State
   - * Zip

   - * Payee Email
   - * Payee Phone
   - * Do you want BSC to obtain ACH/Tax information?
   - * Is it ok for us to contact the person directly with questions?
   - * Is this a US Resident?
   - * Is this a Nebraska Resident?
   - Contract Begin Date
   - Contract End Date

   We prefer to pay everyone as direct deposit (ACH) to send payments faster, please attach the ACH form here if applicable

   Download Blank ACH Form

   a. Enter “Remit To Address” (Required) Line 1, City, State, Zip
   b. Enter “Payee Email” (Required)
   c. Enter “Payee Phone” (Required) Ex: XXX-XXX-XXXX
   d. Enter “Do you want BSC to Obtain ACH/Tax Information?”
i. If Yes - Required Tax Forms obtained by the Business Service Center (BSC)
   1. No Forms will be required to submit Request
ii. If No - Required Tax Forms have already been obtained
   1. You will be prompted to attach the tax forms directly below the “Download Blank ACH Form” tab. Required Tax Forms will differ depending on answers to particular questions.

e. “Is it ok for us to contact the person directly with questions?”
   * Is it ok for us to contact the person directly with questions?

   i. Yes - BSC will contact for information/questions
   ii. No - Requester will contact for information/questions
f. “Is this a US Resident?”
   * Is this a US Resident?

   i. Yes - W9 Needed
   ii. No - W8BEN Needed
   * Is this a Nebraska Resident?

g. “Is this a Nebraska Resident?”
   i. Yes - Go to next step “h. Contract Begin Date”
   ii. No – Answer the following question

   * Is the work being performed in the state of Nebraska?

   1. “Is the work performed in the state of Nebraska?”
      a. Yes - W4NA Needed
      b. No - Go to Next Step “h. Contract Begin Date”
h. Select the “Contract Begin Date”
   i. Select the contract begin date by clicking on \text{dd-mon-yy}

i. Select the “Contract End Date”
   i. Select the contract end date by Clicking on \text{Calendar}

j. “We prefer to pay everyone as direct deposit (ACH)” (Optional)

   i. If Payee has already completed Direct Deposit (ACH) form Click “Browse” to retrieve saved form

   ii. If Payee would like to receive payments via Direct Deposit (ACH) Click “Download Blank ACH Form” and have Payee complete the form and send back to you.
Requester – Required Tax Forms

*Required Tax forms depend on resident and obtaining information questions*

1. **Uploading W9 Tax Form:**
   
   a. If Payee has already completed W9 tax form Click “Browse” to retrieve form
   
   b. If access is needed to the form so Payee can complete information Click “Download Blank W9 Form” and have Payee complete the form and send back to you

2. **Uploading W8BEN Form:**
   
   a. If Payee has already completed W8BEN tax form Click “Browse” to retrieve form
   
   b. If access is needed to the form so Payee can complete information Click “Download Blank W8BEN Form” and have Payee complete the form and send back to you
3. **Uploading W9 and W4NA Forms:**

<table>
<thead>
<tr>
<th>Required Tax Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Upload W9 Form" /></td>
</tr>
<tr>
<td><img src="image" alt="Upload W4NA" /></td>
</tr>
<tr>
<td><img src="image" alt="Download Blank W9 Form" /></td>
</tr>
<tr>
<td><img src="image" alt="Download Blank W4NA Form" /></td>
</tr>
</tbody>
</table>

a. If Payee has already completed tax form Click “Browse” to retrieve form

b. If access is needed to the forms so Payee can complete information Click “Download Blank W9 or W4NA Form” and have Payee complete the form and send back to you

c. When both the W9 and W4NA are required as in the example above you must complete the listed steps for both the W9 and W4NA
1. **To Upload Contract:**
   
a. If Payee has already completed Contract Click “Browse” to retrieve form

   ***If contract is not attached now it must be submitted when payment is requested to the BSC***
Requester – Submit Request

1. **Submit to Business Service Center (BSC):**
   a. This option is given when:
      i. On exception list (Not an Employee)
      ii. Individual has already gone through this particular process
   b. Click on Icon below to submit payment request
      
      ![Submit to Business Service Center Button]

2. **Submit to Human Resource (HR)**
   a. This option is given when:
      i. Not on exception list
      ii. Possibility of Creighton University employment
   b. Click on Icon below to submit payment request
      
      ![Submit to Human Resources Button]

3. **Conformation of Submission:**
   a. Upon Submission to the Business Service Center (please see above)
b. Upon Submission to **Human Resource** (please see above)
1. At any time you can save your request and come back to finish it later

   a. If you would like to come back later and finish some other time Click “Create New Request (Come back later to finish)”

      i. You will receive conformation that the request was created

***This will not submit your request to the Business Service Center (BSC) or Human Resources (HR) therefore make sure to log back in and finish your request at a later date.***
Requester – Status of Request

2. **Status:**
   
   a. Shows where the request is at in the process of determining whether the individual is an employee or an independent contractor
   
   b. Word (under “Status” column) corresponds with a definition of each

Requester – Reference ID

1. **Reference ID:**
   
   a. Each request will be given a distinctive number that corresponds with your given request
   
   b. This number can be found in the email that was sent to you for confirmation of the request