CWU | Central Washington University
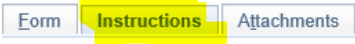
Step-by-Step Guide

Quick Guide for Entering an Online Contract Intake Form

This document provides users with high level instructions on how to enter and submit the contract intake form.

1.	Log into MyCWU.
2.	Click on Main Menu on MyCWU Dashboard Navigation: **Main Menu > Financial Management > Employee Self Service > Procurement > Contract Intake Form**
3.	Click the **Add a New Value** tab. **Search/Fill a Form** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value | Add a New Value
4.	Click the **Instructions** tab to review the instructions on how to correctly fill out and submit the form. Form | Instructions | Attachments **Contract Intake Form** **Instructions for Completing the *Contract Intake* Form** **Definition for:** "**Contract Administrator**": The CWU employee responsible for monitoring and handling CWU's obligations under the agreement. Note: The workflow approval step for appointing authority will be who the employee's appointing authority is.
5.	Click the **Form** tab. Form | Instructions | Attachments Enter the appropriate form fields. **Note:** * indicates a required field. You will not be able to save your form until you fill in all the required fields.
6.	At the bottom of the form is the [Save] button. Click Save. Note: You can not add attachment(s) until you save your form.

If you still need to add additional information, you can find your form by navigating to the forms page and clicking the Search button. Select your form from the search results.

Find an Existing Value | Add a New Value

▼ **Search Criteria**

Sequence Number | = | |
Subject | begins with ✔ | |
Document Key String | begins with ✔ | |
Priority | = | | ✔
Due Date | = | | 📅
Approval Status | = | | ✔

☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

CAUTION

Double check that you have attached your contract materials by clicking the **Attachments** tab. (see highlighted tab below).

Form | Instructions | Attachments

7.

Always scroll to the bottom of the form and **click save** **before you submit** your Contract Intake form.

Save

Return to Search | Previous in List | Next in List | Notify

8.

When you are ready to submit, your form you can click the **Submit** button located at the near the top of the form.

Contract Intake Form

ect This is a test contract request

ity 3-Standard

tus Initial   Preview Approval   Submit

9.

You can preview the approval chain by clicking on the **Preview Approvals.**

Contract Intake Form

ect This is a test contract request

ity 3-Standard

tus Initial   Preview Approval   Submit

Contract Intake Form

Subject Test for Grants/Contracts & Attachments

Review/Edit Approvers

Contract Intake eForm Approval

Contract Intake Form: 3591:Initiated

1

Not Routed	Not Routed	Not Routed	Not Routed	Not Routed
Kristin Leslie Project Fiscal Manager	William Schafer Appointing Authority for eForm	Katherine Frank VP Approver for Contract eForm	Heather Harrell Fund Admin for Contract eForm	Shellie Snyder Contract Office

---

10.

You can notify CWU employees by email that you have submitted a Contract Intake Form by clicking the **Notify** button at the bottom of the form page.

Save

Return to Search   Previous in List   Next in List   Notify

Type in the email addresses of the various individuals that you want to notify. Do not changed the content in the Template section. (see the below screenshot).

If you have any questions, please contact the Contracts Office (509-963-2324) or email cwu.contractsoffice@cwu.edu.

What if my eForm is Denied?
If your Contract Intake eForm is denied, you can follow the below instructions to find out why. *Note:* You can re-submit the eForm even if it is denied once you make the adjustments noted in the Comments section.

1.	The eForm submitter will receive an email notifying them that their eform has been denied. To find the denial comments, click on the **Approver Status** button.
2.	Click on the sideways triangle next to **Comments.** Review the comments section to understand why the eForm was denied.