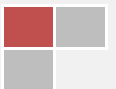


Personnel Services Contracts System

The Quick Start Guide

This document provides a high level summary of the PSC system and steps required for use.



Contents

Table of Contents

Overview	2
Process	2
Step 1: Contractor.....	2
DUO Two Factor Setup	6
Completing the Contract Steps:	11
Step 2: Unit Administrators	12
Step 3: Unit Administrator Review	14
Step 4: VP Review	15

Overview

The Personnel Services Contracts system supports the onboarding process for contractors. The fully electronic process is designed to support unit administrators, contractors, the UC contracting Office, Human Resources and other affiliated groups. Please use the following as a high level reference by role.

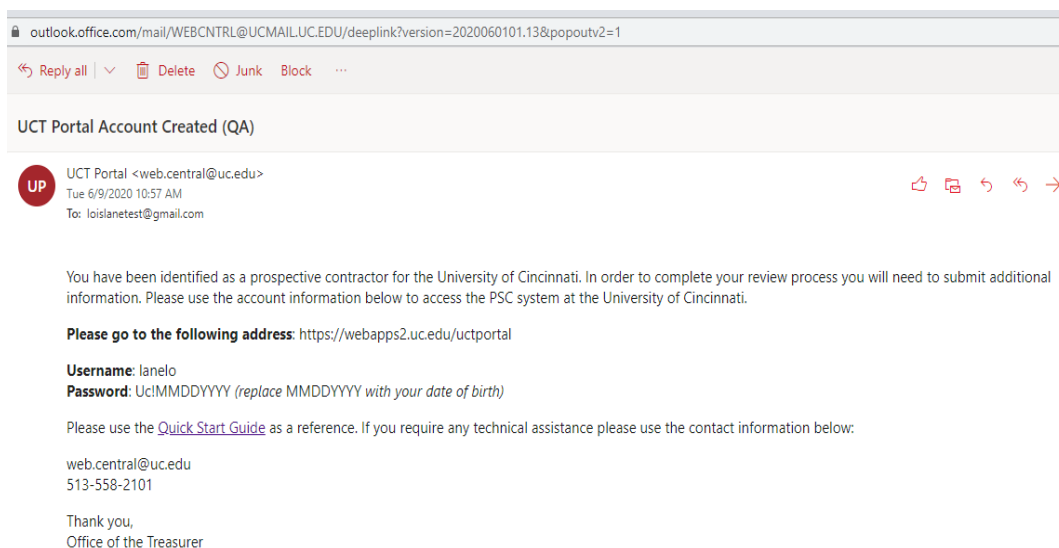
System Location: <https://webapps2.uc.edu/uctportal/>

Process

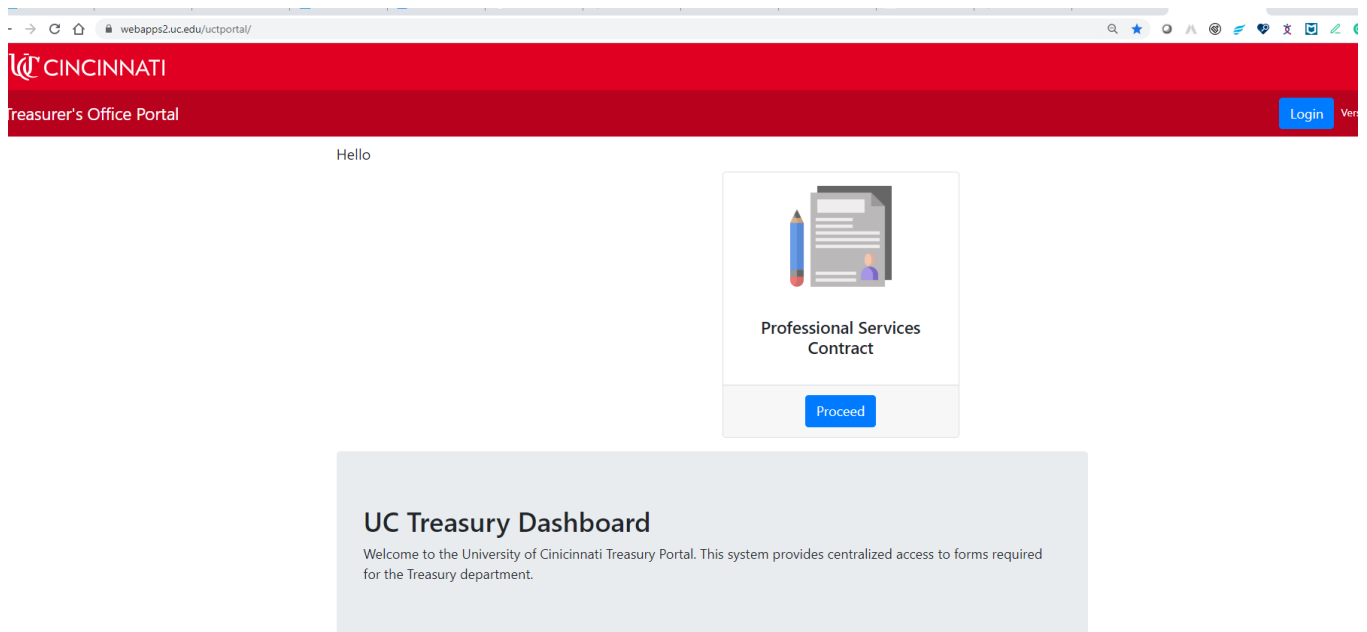
Step 1: Contractor

Once the unit head submits the initial request, an account is generated for the contractor. The contractor receives an email alert along with instructions to access the system. Once the contractor logs in, the contractor will complete the following steps.

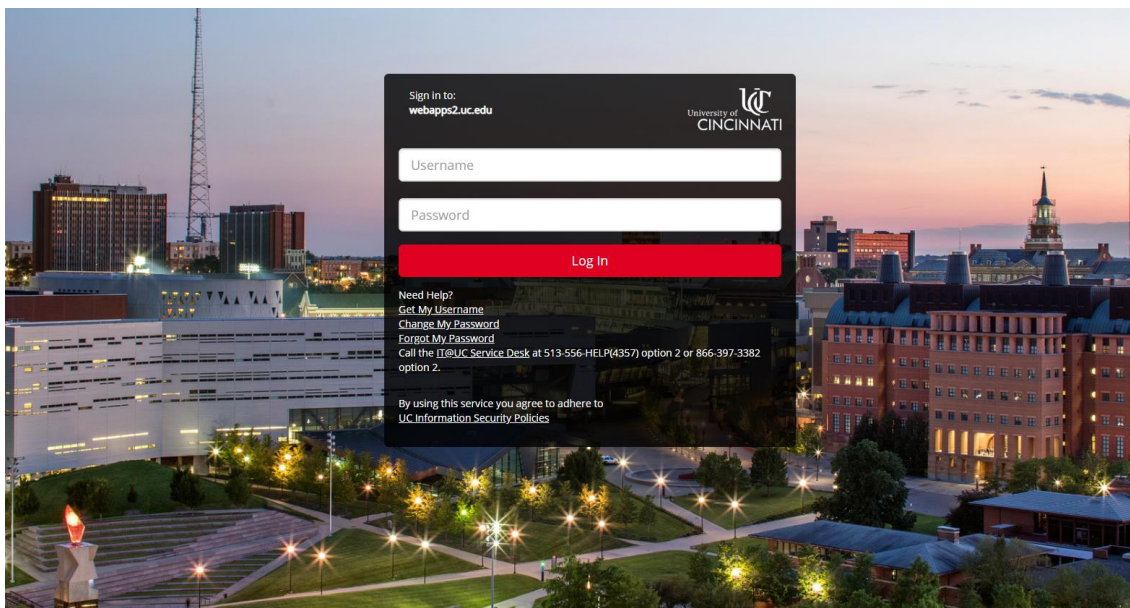
1. The contractor receives an email alert with login instructions:



2. Log into <https://webapps2.uc.edu/uctportal/>

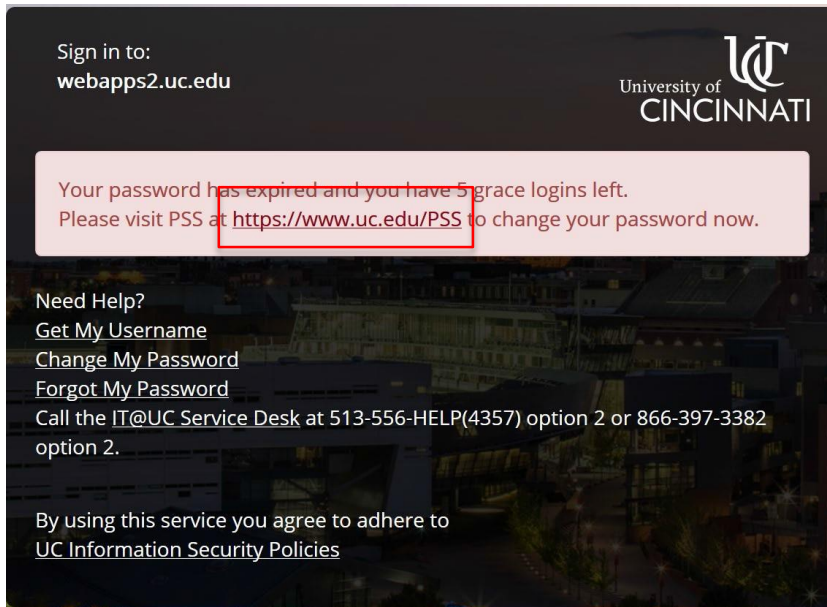


3. You will automatically be taken to a sign in page (below). Use the Username/Password from the email you received to log into the application.

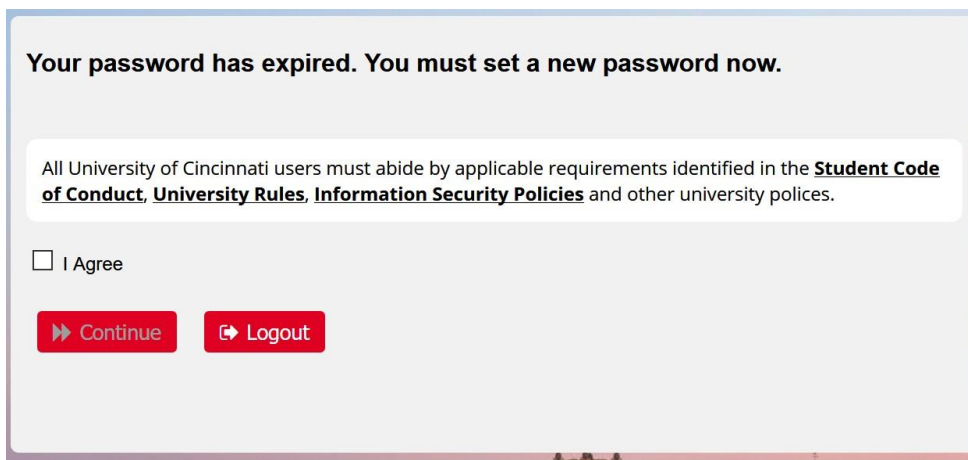


4. Account Creation

5. If this is your first time logging into UC, you will need to update your password after logging in.
6. After Logging in you will receive the message below. Click the Highlighted link to modify your default password.



7. Select I agree



8. Enter a new password following the password rules in the instructions.

9. Reset your UC password

Your password has expired. You must set a new password now.

Please change your password. Keep your new password secure. After you type your new password, click the Change Password button. If you must write it down, be sure to keep it in a safe place. Your new password must meet the following requirements:

- Password is case sensitive.
- Must be at least 8 characters long.
- Must be no more than 24 characters long.
- Must include at least 1 number.
- Must have at least 1 lowercase letter.
- Must have at least 1 uppercase letter.
- Must not include part of your name or user name.
- New password may not have been used previously.

Please type your new password

New Password

Confirm Password

» Change Password

10. You will receive confirmation that the password has been changed.

The password has been changed successfully.


» Continue

11. Once you complete the steps above, you will need to login again and set up your two- factor login for additional security. This additional layer of security is provided to protect your personal information.

<https://webapps2.uc.edu/uctportal/>

12. After logging in you will be prompted to complete your Duo Two Factor Setup.

DUO Two Factor Setup



[What is this?](#) [Need help?](#)

Powered by Duo Security


Protect Your University of Cincinnati Account

Two-factor authentication enhances the security of your account by using a secondary device to verify your identity. This prevents anyone but you from accessing your account, even if they know your password.

This process will help you set up your account with this added layer of security.

[Start setup](#)

Select the device you would like to use. We recommend using the Mobile Phone option.



[What is this?](#) [Need help?](#)

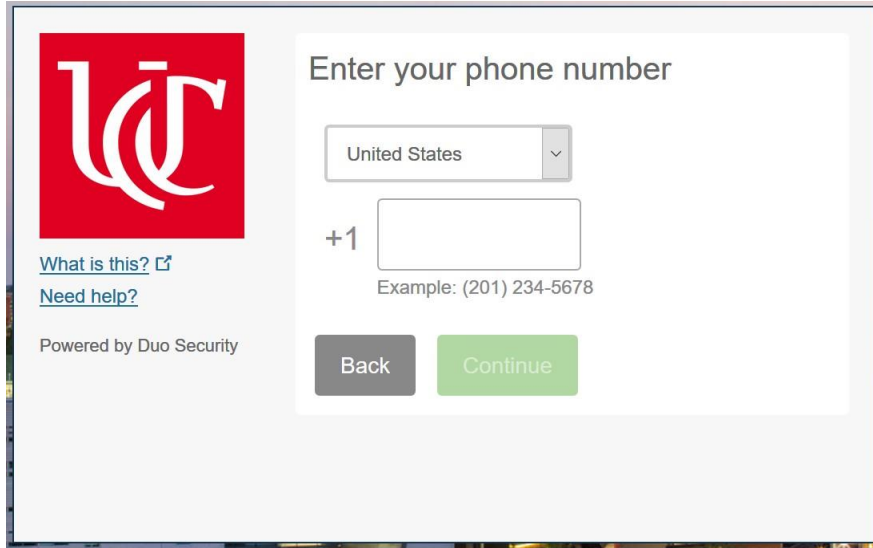
Powered by Duo Security

What type of device are you adding?

- ☒ **Mobile phone** RECOMMENDED
- ☐ **Tablet** (iPad, Nexus 7, etc.)
- ☐ **Landline**
- ☐ **Security Key** (YubiKey, Feitian, etc.)
- ☐ **Touch ID**
Requires Chrome on macOS to use Touch ID.

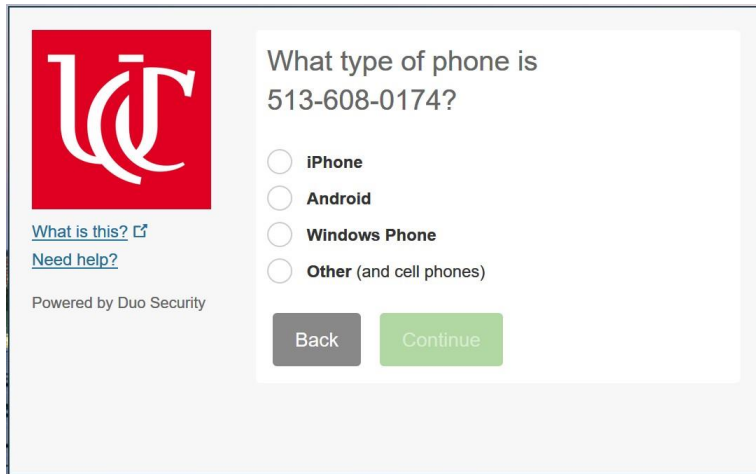
[Continue](#)

Enter your phone number



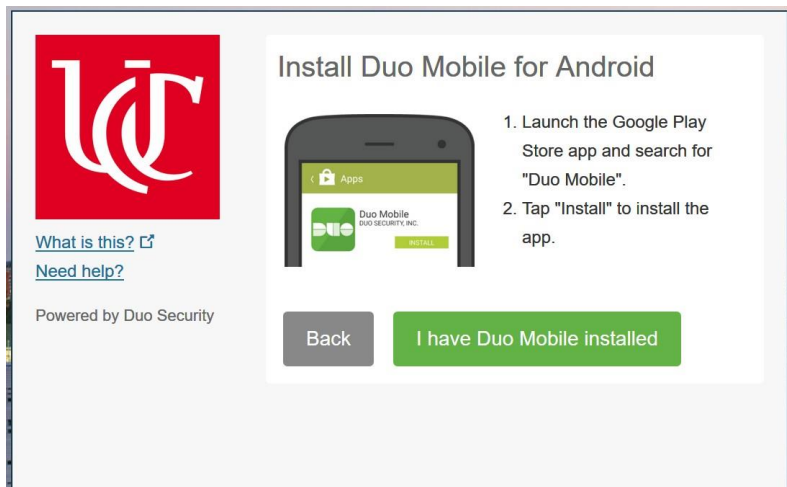
The screenshot shows a Duo Security interface for entering a phone number. On the left, there is a red square logo with a white stylized 'U' and 'C'. Below the logo are two links: 'What is this?' and 'Need help?'. Further down, it says 'Powered by Duo Security'. The main content area on the right has the title 'Enter your phone number'. It features a dropdown menu set to 'United States', a text input field with a '+1' prefix, and an example number '(201) 234-5678'. At the bottom of this section are two buttons: 'Back' and 'Continue'.

Select your phone type

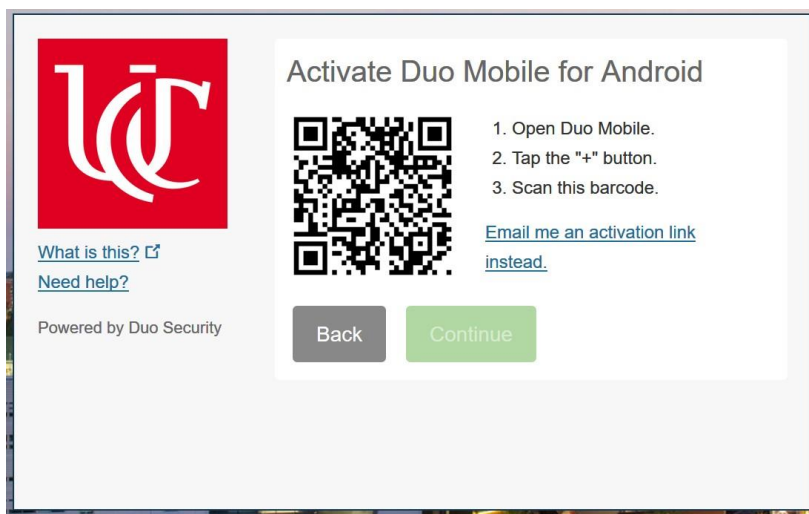


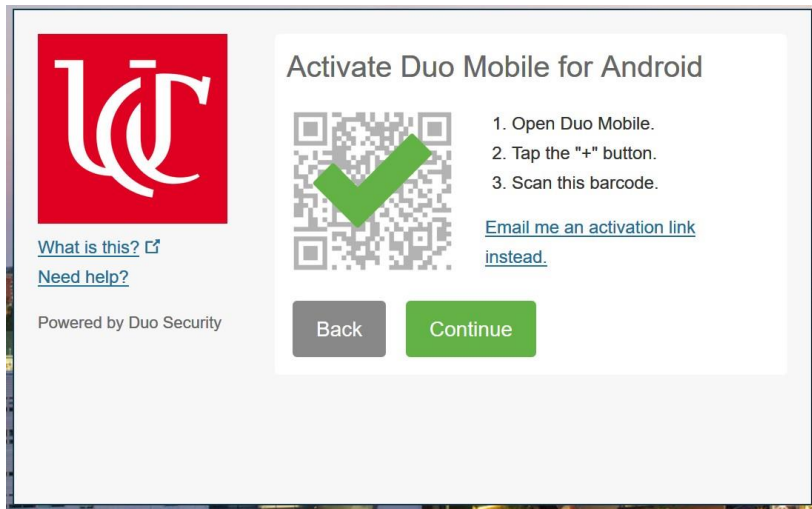
The screenshot shows a Duo Security interface for selecting a phone type. On the left, there is a red square logo with a white stylized 'U' and 'C'. Below the logo are two links: 'What is this?' and 'Need help?'. Further down, it says 'Powered by Duo Security'. The main content area on the right has the title 'What type of phone is 513-608-0174?'. It features four radio button options: 'iPhone', 'Android', 'Windows Phone', and 'Other (and cell phones)'. At the bottom of this section are two buttons: 'Back' and 'Continue'.

Install Duo App

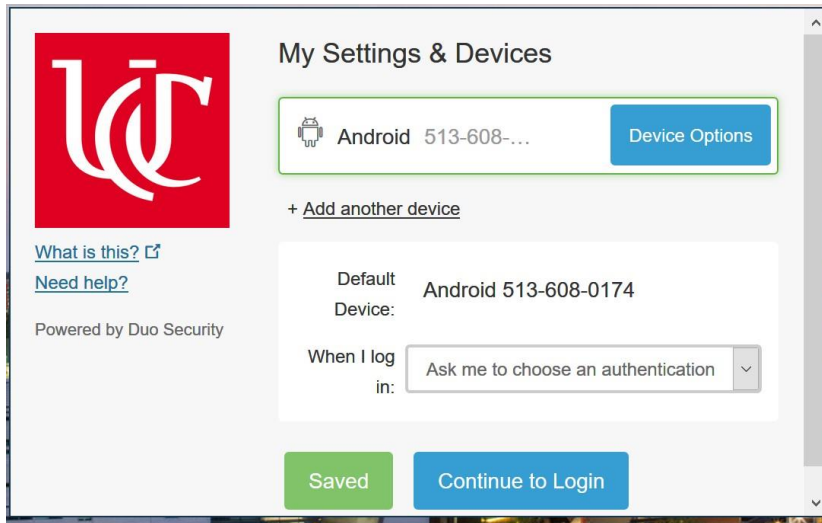


Activate your DUO Account

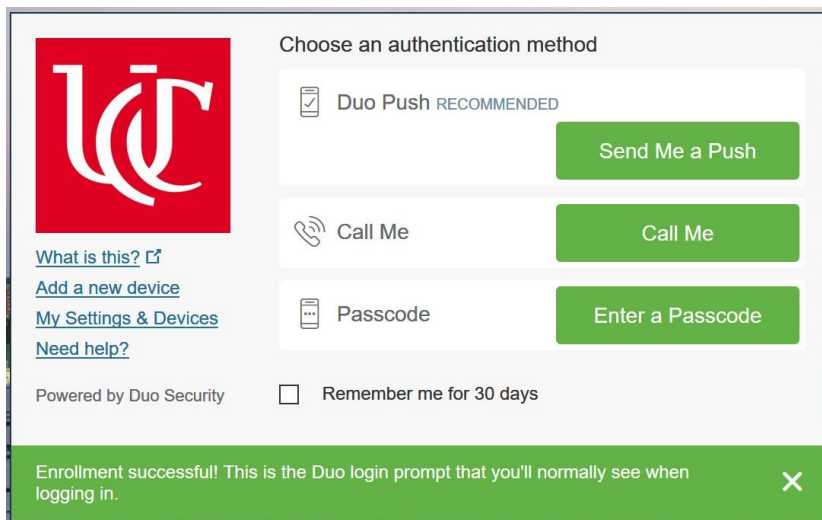




Review your settings and select continue to login to access the system.



Now that your Duo account is set up, to login click Send me a Push. The notification will pop up on your phone. Click the notification, then click the enable button. This will take you to the login screen.



Login using your username from the email, and the new password you changed.

U CINCINNATI
Treasurer's Office Portal Active Archive [Logoff](#)

Professional Services Contract - Active Items

[Create New Professional Services Contract](#)

Search Term: Status: College:

Show 10 entries [Previous](#) [1](#) [Next](#)

Title	Created	Department	Workflow Step
Your Name	Tuesday, June 9, 2020	COM Medical Education	Contractor Reviews and Signs Contract

Showing 1 to 1 of 1 entries [Previous](#) [1](#) [Next](#)

Completing the Contract Steps:

- Log into the PSC system using the URL Link provided in the email.
- Select Your Name / the initiated contract request.
- Use the wizard to complete the requested information:
 - Demographics
 - Employment Information
 - Foreign visitor form (if applicable)
 - A summary of the work and compensation info
 - Sign & Submit

U CINCINNATI
Treasurer's Office Portal Active Archive [Logoff](#) Ver: 2.0.0 11/11/2019

1. Demographics 2. Citizenship & Employment 2a. Foreign Visitors Form 3. Review Work Info

4. Review Compensation 5. Sign & Submit

[Previous](#) [Next](#) [Save](#) [Submit Form](#) [Return to Previous Step](#)

First Name * Middle Name Last Name *

SSN or ITIN * Birth Date * Email *

US Address *

Please take care of issues:

City * State * Zip Code *

Please take care of issues: Please take care of issues: Please take care of issues:

If foreign address, please enter here:

[Previous](#) [Next](#) [Save](#) [Submit Form](#) [Return to Previous Step](#)

Issues:

- 1. Demographics
 - US Address is Required
 - City is Required
 - State is Required
 - Zip Code is Required

Workflow:

- Unit Admin Initiation Process (Internal Longs Policy)
- Contractor Reviews and Signs Contract (Exam Date 6)
- Unit Admin Signs Contract (3)
- VF Signs Contract (1)
- University Contracting Office Reviews Contract (3)
- University Contracting Office Signs Contract (3)

Complete the contract by signing and submitting the contract.

Disclaimer

I hereby certify that, in performing these services, I am not an employee of the University of Cincinnati, nor am I conducting business with the university through a corporation, partnership, limited liability company, or other form of business entity.


I further understand and agree that in providing these services, I am at all times an independent contractor, and not an employee of the University of Cincinnati. I understand and agree that I am not eligible for employee benefits, including but not limited to retirement benefits based on work or activity contemplated under this agreement.

I further agree to abide by relevant provisions of the Revised Code of Ohio, the Bylaws and Rules of the University of Cincinnati, the official actions of the Board of Trustees, and any other UC policies that may apply to independent contractors. This contract may be cancelled by the University of Cincinnati upon three days written notice of cancellation mailed to the Contractor (me) at the address given in the Contractor Information section.

I understand that no service may begin until this agreement is consummated, as evidenced by the signatures of the organizational unit approver, the Vice President (if required), the Human Resources approver (if required), the Contracting Officer, and the Contractor (me).

I understand that I am required to submit invoices or time sheets for work already performed, to the organizational unit so that they may begin to process my payment requests.

Contracted

I have reviewed the information and attest that it is accurate. 

Contract (Mollie Burk)


- Unit Admin Signs Contract ()
- University Contracting Officer Reviews Contract ()
- University Contracting Officer Signs Contract ()

Step 2: Unit Administrators

Unit administrators initiate the process by completing relevant information including a high level summary of the position, contractor, and salary expectations.

Unit Administrator:

1. Log in to the PSC system
2. Select the button labeled "Create New Professional Services Contract."


CINCINNATI

Treasurer's Office Portal
Active
Archive
Logoff
Version 1.3.0.0

Professional Services Contract - Active Items

[Create New Professional Services Contract](#)

Search Terms:
Status:
College:

Show All
Show All

Show 10 entries
Previous 1 2 3 4 5 8 Next

Title	Created	Department	Workflow Step	
	Wednesday, June 3, 2020	N/A	Unit Admin Initiates Process	Edit
Appleseed, Jonny	Wednesday, June 3, 2020	UCBA Admissions	Unit Admin Signs Contract	Edit
PSC Release Test Last , PSC Release Test First	Wednesday, June 3, 2020	RES Research Development	Unit Admin Signs Contract	Edit
Fried, Augustus	Saturday, May 30, 2020	A&F Business Affairs Office	Unit Admin Signs Contract	Edit
Riep, Josette	Wednesday, June 3, 2020	Ool Strategies & Partnerships	HR Reviews Contract	Edit
Graham, Barth	Monday, June 1, 2020	Ool External Relations	Unit Admin Signs Contract	Edit

3. Use the wizard to complete 4 categories of information:

1. Contractor Information
2. Job Duties
3. Daily Activities
4. Compensation & Submit

UC CINCINNATI
Treasurer's Office Portal | Active | Archive | Logoff | Version: 1.3.0.0

1. Contractor Information | 2. Job Duties | 3. Daily Activities | 4. Compensation & Submit

Previous | Next | Save | Submit Form

First Name * | Middle Name | Last Name *

SSN or ITIN * | Birth Date * | Email *

Job Title for Contractor *

Has the worker provided services for UC, as a contractor, in the past? *

☐ Yes ☐ No

Issues

1. Contractor Information

- First Name - Is Required
- Last Name - Is Required
- Birth Date - Is Required
- Email - Is Required
- Job Title for Contractor - Is Required
- Has the worker provided services for UC, as a contractor, in the past? - Is Required

Workflow

- Unit Admin Initiates Process (<List of Approvals>)
- Contractor Reviews and Signs Contract ()
- Unit Admin Signs Contract ()
- University Contracting Officer Reviews Contract ()
- University Contracting Officer Signs Contract ()

Step 3: Unit Administrator Review

Once the contractor signs and submits, the unit admin will review before sending to the UC Treasurer's office.

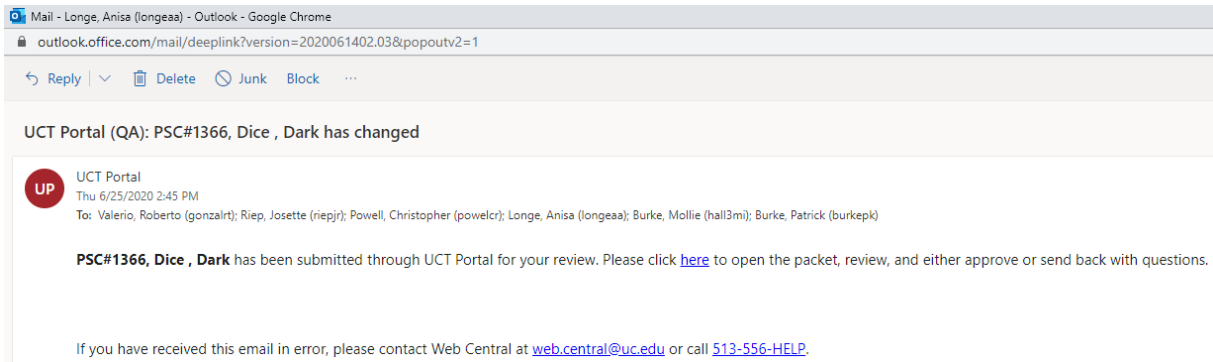
Steps:

1. Log in to the PSC system
2. Select the contract to review
3. Review the contract
4. Submit

Once submitted, the treasurer's office will review and finalize for processing.

Step 4: VP Review

The VP step in the PSC workflow begins with receiving an email notifying the VP that a contract has been submitted for review.



1. You will receive an email from the UCT Portal with the contract number and title listed in the Subject line.
2. Click the underlined [here](#) in the email go to the UCT Portal application.
3. The link will open the contract identified in the email:

A screenshot of the 'Review Contract' form in the UCT Portal. The form is titled 'Review Contract' and has navigation buttons: 'Previous', 'Next', 'Submit Form', and 'Return to Previous Step'. The form contains several fields and questions:

- 1. First Name: Josette, Middle Name: Rena, Last Name: Riep
- 2. Job Title: test
- 3. Do you provide/promote these services for others? (Radio buttons: Yes, No)
- 4. Do you use a separate business name? (Radio buttons: Yes, No)
- 5. Are you a member of a union? (Radio buttons: Yes, No)
- 6. Will this contract be your primary source of income? (Radio buttons: Yes, No)

On the right side, there is a 'Workflow' section with a list of steps: 'Unit Admin Initiates Process (Riep, Josette)', 'Contractor Reviews and Signs Contract (Riep, Josette)', 'Unit Admin Signs Contract (Riep, Josette)', 'VP Signs Contract (Heather Marie Cox)' (highlighted in red), 'University Contracting Officer Reviews Contract ()', 'University General Counsel Signs Contract ()', and 'University Contracting Officer Signs Contract ()'. Above the workflow is a 'Prefilled Forms' section with a 'PDF Export' button.

4. Review the contract information. Select Submit button to move the contract to the next workflow step.

The screenshot displays the UC Cincinnati Treasurer's Office Portal. The main content area is titled "Review Contract" and contains a form with the following fields:

- 1. First Name: Josette
- 2. Job Title: test
- 3. Do you provide/provide services to the University?
☐ Yes ☒ No
- 4. Do you use a separate contract?
☐ Yes ☒ No
- 5. Are you a member of a union?
☐ Yes ☒ No
- 6. Will this contract be your primary source of income?
☐ Yes ☒ No

A modal dialog titled "Submit Form" is overlaid on the form. It contains a text input field labeled "Comments if Any" with a green checkmark icon to its right. Below the input field are two buttons: "Submit Form" (blue) and "Cancel" (grey). The background form is partially obscured by the modal.

- Once submitted, the workflow will send an email to the role next step and update the workflow on the right side of the application. In this case, it will send an email to the University Contracting Officer for review.
- If you need additional or a correction, you may select Return to the Previous Step

The screenshot shows the 'CINCINNATI' logo and 'Treasurer's Office Portal' header. The main form is titled 'Review Contract' and includes fields for First Name (Josette), Middle Name (Rena), Last Name (Riep), Job Title (test), and two yes/no questions. Navigation buttons 'Previous', 'Next', 'Submit Form', and 'Return to Previous Step' are at the top. A sidebar on the right shows a 'Workflow' list with steps like 'Unit Admin Initiates Process', 'Contractor Reviews and Signs Contract', 'Unit Admin Signs Contract', 'VP Signs Contract', 'University Contracting Officer Reviews Contract', 'University General Counsel Signs Contract', and 'University Contracting Officer Signs Contract'. The 'Return to Previous Step' button is highlighted with a red box, and an arrow points to the 'University Contracting Officer Reviews Contract' step in the workflow.

- From the dialog box, select the role in the drop down menu and click Return to the Previous Step to return the contract to a previous step.

This screenshot shows the same 'Review Contract' form, but with a 'Return to Previous Step' dialog box open. The dialog box has a title bar and a 'Step to move to' dropdown menu. The dropdown menu is open, showing three options: 'Unit Admin Initiates Process', 'Contractor Reviews and Signs Contract', and 'Unit Admin Signs Contract'. The 'Return to Previous Step' button is highlighted in blue, and a 'Cancel' button is also visible.