

7 Steps to Upwork from P2P.

IMPORTANT RULES

A purchase order is required for EACH project/contract, and must be in place PRIOR to beginning any services with independent contractor(s) on the UpWork platform. Payment to UpWork must be paid directly by the University. Reimbursement of personal funds paid to UpWork is unallowable.

01 Sign Up:

- Activate your account in minutes at <https://view.highspot.com/viewer/630d3b1151f9aab41ede6297>
- Just enter your name, email, and create a password to get started



02 Start Your Search:

- Post your project
- Or email your dedicated Program Team to support your project, from sourcing talent to final deliverable

03 Find Talent:

- Evaluate proposals from interested freelancers
- Or invite freelancers to submit proposals
- Review proposed costs, timelines, and communicate with Upwork Messages
- Interview your top choices

04 Calculate Your Costs:

- Evaluate proposals from interested freelancers
- Or invite freelancers to submit proposals
- Review proposed costs, timelines, and communicate with Upwork Messages
- Interview your top choices

05 Request a General Purchase Ticket in ServiceNow!:

- Send the following documents to <https://cbs2.ucmerced.edu/support-we-offer/purchasing>
- Universal Form
- Ensure to include your Upwork account number
- Business justification, including who, what, where, when, why and the benefit to the University
- Quote or Estimate
- Obtain a copy of the purchase order

06 Start Your Project:

- Finalize contract details
- Within Upwork, assign the PO in the contract terms and extend an offer
- Kickoff your project
- Work together and track milestones

07 Make Payments to Upwork:

- Finalize contract details
- Within Upwork, assign the PO in the contract terms and extend an offer
- Kickoff your project
- Work together and track milestones