



the results company



# Sub-Contractor Onboarding Process

# Different Types of Sub-Contractors:

## Short Term Sub-Contractor:

- A Sub-Contractor who will be used for the short term. Someone on a less than 6-month project

## Long Term Sub-Contractor:

- A Sub-Contractor who will be used in the long term. Someone who will be used for multiple projects on an ongoing basis.

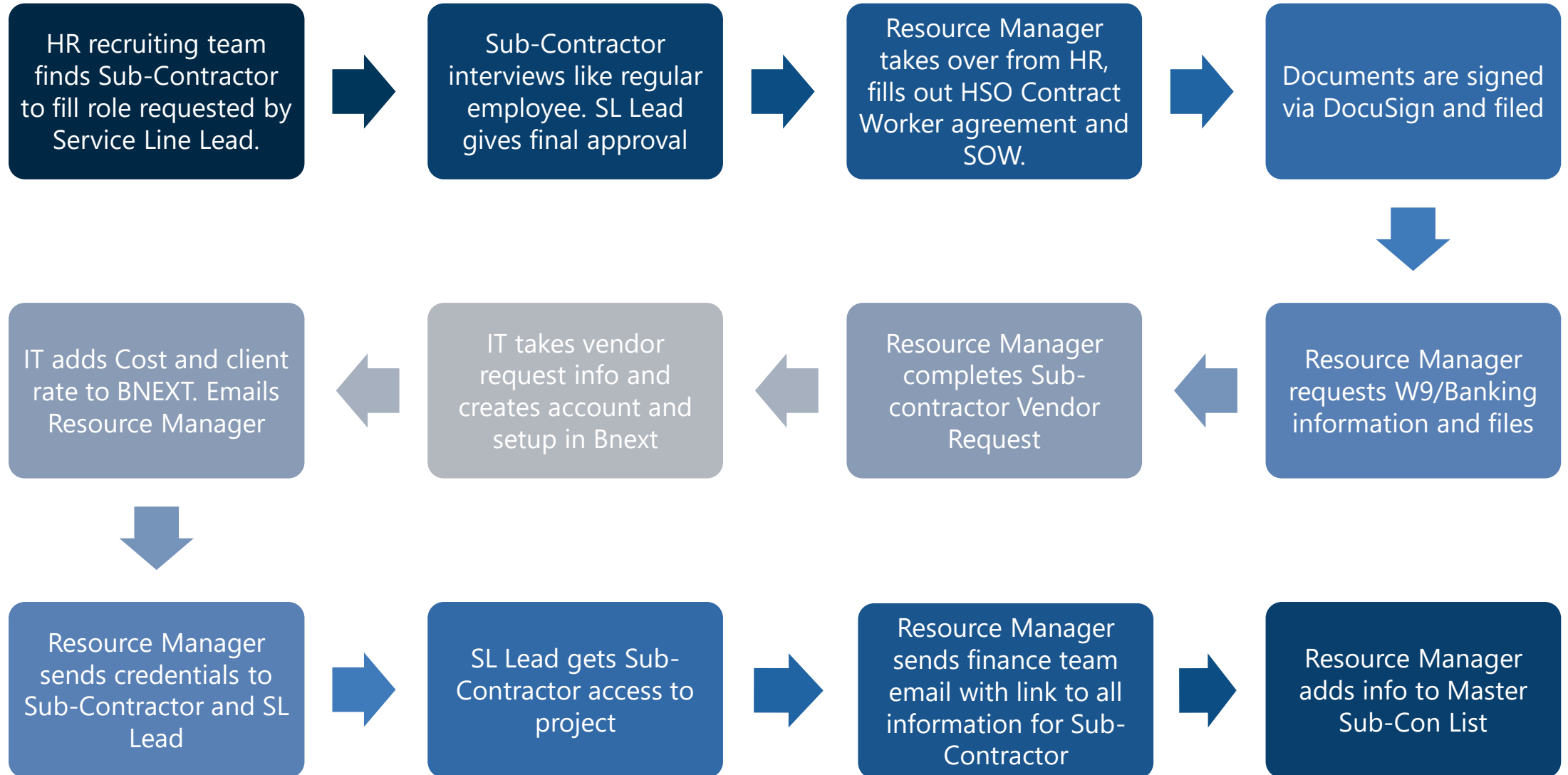
## G&A and Marketing Sub-Contractor:

- A Sub-Contractor who will be used specifically for G&A and Marketing role responsibilities

## Key Rule:

A new SOW must be created if any change in a rate for a Sub-Contractor is to occur

# Process Flow Chart:



# First Stages of Sub-Contractor Onboarding:

1. HR recruiting team is the party responsible for finding Sub-Contractors. They will put into specific categories. Recruiting team will present contractors as options.
2. Service Line director will request for sub-contractor. Sub-Contractor will go through typical employee interview process with appropriate directors or resources. Discuss work, rates, etc.
3. SL Director will conduct final interview and give approval to recruiting team.
4. Recruiting team will inform resource manager on approval. Jess Kimmel for ES and Lidia Payne for ProServ. They will take over as Onboarder from HR.
5. Resource Manager or Onboarder will now fill out HSO Contract Worker Agreement. Located [HERE](#)



HSO Subcontractor Agreement.docx

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# Sub-Contractor Work Agreement:

1. Resource manager will work with service line lead to obtain necessary information to complete a Subcontractor Worker Agreement and Statement of Work (SOW).

- Assigned project
- Specific role
- Specific tasks
- Hourly rate
- Start date and estimated complete date

2. Open Sub-Contractor Agreement, fill out all yellow items

**HSO ENTERPRISE SOLUTIONS, LLC**  
**SUBCONTRACTOR AGREEMENT**

This Subcontractor Agreement (this "Agreement") is entered into on [MONTH] \_\_\_\_, 2022, by and between HSO Enterprise Solutions, LLC, a New York limited liability company with its principal offices at 350 5<sup>th</sup> Avenue, Suite 6902, New York, NY 10018 ("Client") and [redacted], a [state] [corporation] with its principal offices at [redacted] ("Contractor").

**I. INDEPENDENT CONTRACTOR**

A. **Status** Contractor will act solely as an independent contractor and shall not be considered, under the provisions of this Agreement or otherwise, as an employee or agent of Client.

**CONTRACTOR:**

[Name]  
[Address]  
[email]  
[Phone]

F. **Assignability** This Agreement is not assignable by Contractor, nor may any of

- Examples

3. Once filled out, turn into PDF, send through DocuSign to SL director and Sub-Contractor/Company for signatures and final review.


4. Once signed by parties, file [HERE](#)


## Sub-Contractor SOW:

1. A SOW is needed for ALL sub-contracting companies and each specific individual employee

2. SOW is found [HERE](#)

### 3. Fill out Yellow items:


The website address


The project address

### 5. Statement of Work (SOW) Overview

HSD Engineering Solutions, LLC (HSD) is issuing offers at 300 S 4th Street, Suite 600, New York, NY 10119. **has requested** to provide services on behalf of **Customer**, having offices at **Customer**, to assist in our project with the HSD clients listed below for the duration of this agreement.

This Statement of Work must be signed in conjunction with HSD's Independent Contractor Master Agreement that addresses all the general terms and conditions that are pursuant to this agreement.

### 6. Statement of Work Details

**2.1. Requirements:** The table below describes the tasks associated with this work effort as well as the anticipated level of effort used to complete each of the tasks.

Task #	Task Description	Estimated Hours
1	<b>US, HSD, LOI Subcontract Consulting (17400 - Finance Market)</b>	10
2		
<b>Total</b>		<b>10</b>

**2.2. Scheduled Start and Completion Dates**

Task #	Estimated Start Date	Estimated Completion Date
1	01/01/2025	02/01/2025

**2.3. The HSD project team may decide to change the composition of the assigned team members depending on the project's needs. In the event that this occurs, and these decisions require the use of Contractor's employees, HSD will give Contractor a written email (24 business day notice). Employees of Contractor must also provide written (email) business day notice prior to leaving an HSD project team.**

### 7. Pricing

**7.1. Project Pricing:** This Statement of Work will be delivered on a fixed and material basis. Worker's billing rate to HSD will be **\$100.00 / hour**.

**7.2.** Whether used to enter into an HSD's Time and Expense system, Worker will receive instructions on how to access this system and how and where to enter time. It is not required to submit a separate invoice for payment. Worker shall submit a weekly Status Report. Worker shall provide as much detail as is completed the tasks as possible on weekly time sheets. Properly submitted and approved time sheets will be paid to Contractor within thirty (30) days, on the 15th and last day of the month.

**7.3.** The following table indicates the agreed upon pricing for work created under this Statement of Work that will be provided by Contractor on behalf of HSD to its client(s).

Task	Hourly Rate (USD)	Estimated Total Hours	Estimated Total Cost (USD)
<b>1. US, HSD, LOI Subcontract Consulting (17400 - Finance Market)</b>	<b>\$100</b>	<b>10</b>	<b>\$10</b>
<b>Total</b>			<b>\$10</b>

### 8. Time Entry

**8.1.** Contractor is required to enter all time accurately and on time in HSD's Time and Expense management system. Training on this system will be provided.

**8.2.** The closing time for time entry is every Friday at end of business day, for the work performed through the week prior.

**8.3.** In the event of delayed time entry, the Contractor is required to notify HSD immediately via email [hr@hdsolutions.com](mailto:hr@hdsolutions.com) or [hr@hdsolutions.com](mailto:hr@hdsolutions.com) (Business Monday to Friday 9:00am to 5:00pm).

### 9. Travel Lodging & Meal Expenses

**9.1.** Travel, lodging, meals, car, rentals, and incidental expenses will be provided at actual costs. HSD does not reimburse expenses and tools based on its allowance as possible to receive the most [hr@hdsolutions.com](mailto:hr@hdsolutions.com) travel accommodations.

### 10. Customer Information

Customer Name	HSD
Customer Address	HSD
Customer Phone	HSD
Customer Email	HSD
Customer Phone #	HSD

HSD Engineering Solutions, LLC 300 S 4th Street, Suite 600, New York, NY 10119  
(212) 486-1234 | [info@hdsolutions.com](mailto:info@hdsolutions.com)

HSD - Issues 100000175 New York, NY 10119  
30-02-2025 09:00 AM EST


**HSO** Healthcare Solutions

**Statement of Work Between  
XX and HSO Enterprise Solutions, LLC.**

Date: 03/21/2022  
Prepared by: Jess Kinnel

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100 0th Avenue, Suite 400 | Deerfield, IL 60015  
(773) 265-7800 | [www.hso.com](http://www.hso.com)


Use the following information to complete this form.

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**1. Statement of Work (SOW) Overview**

HSD Enterprise Solutions, LLC ("HSD"), having offices at 150 1st Avenue, Suite 6002, New York, NY 10013, has requested **Wuhua** to provide services on behalf of **China State**, having offices at **address**, to assist in our project with the HSD identical listed below for the duration of the agreement.

The Statement of Work must be signed in conjunction with HSD's Independent Contract Worksheet Agreement that addresses all the general terms and conditions that are pertinent to this agreement.

**2. Statement of Work Details**

2.1. **Requirements:** The table below describes the tasks associated with this work effort as well as the anticipated level of labor effort to complete each of the tasks.

Task #	Task Description	Estimated Hours
1	By HSD/HSD Functional Consulting (FAM) - <b>Teamwork Module</b>	20
2		
<b>Total</b>		<b>20</b>

2.2. **Scheduled Start and Completion Dates:**

Task #	Estimated Start Date	Estimated Completion Date
1	02/01/2020	02/01/2020

2.3. The HSD project team may decide to change the composition of the assigned team members depending on the project's needs. In this event, they will notify you, and their decisions might increase the workload of Contractor's employees. HSD will give Contractor a written notice (3) business-day notice. Employees of Contractor must also provide written notice (3) business-day notice prior to leaving an HSD project team.

**3. Pricing**

3.1. **Project Pricing:** This Statement of Work will be delivered on a time and material basis. Wuhua's billing rate to HSD will be **\$100,000/1000**.

4. Onboarder will export to PDF file and send to both Subcontractor and SL Lead for signature through DocuSign

**Key Info:**

*Pages 3-4 are most important. Need very specific work type and hours*

### Key Info:

*Pricing will always be Time and Material Rate. Can be changes on pricing due to longer contract/ extended PoP. Put this in pricing area.*

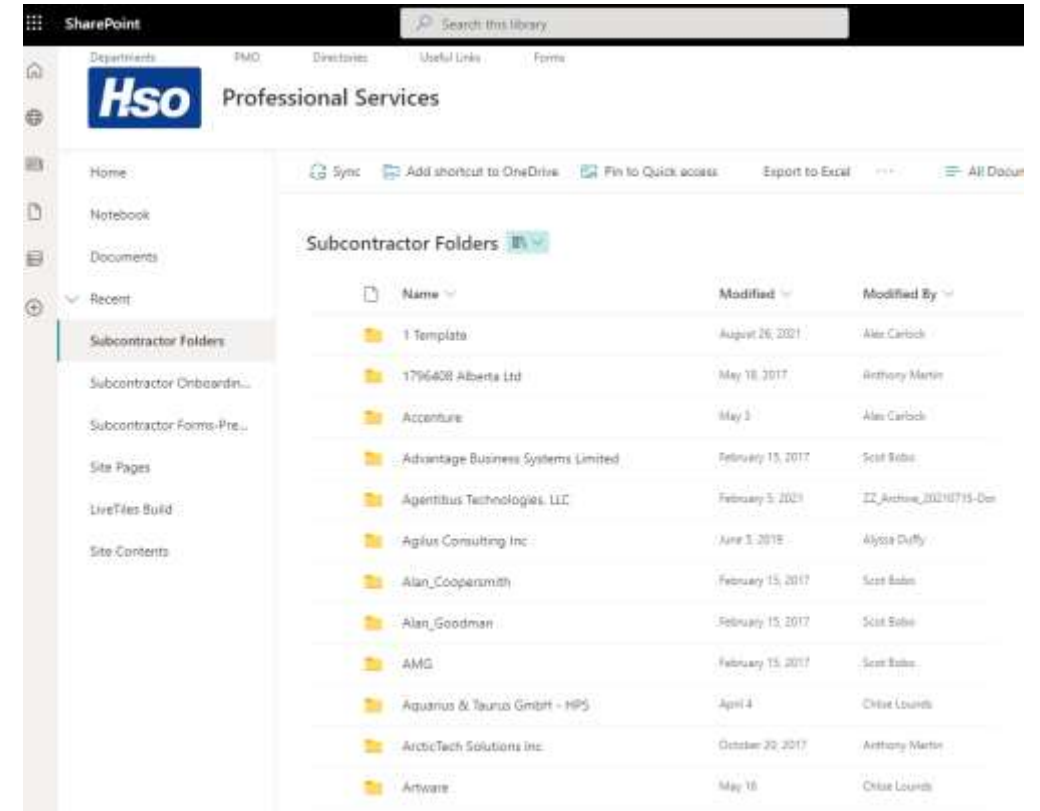
# Banking Information and Filing:

1. Once Sub-Contractor agreement and SOW is signed. Resource Manager/Onboarder requests W9 and banking details from the Sub-Contractor. This information goes to Shravana Reddy (subcontractor email that goes to)

2. Once all documents are signed and W9/banking info is in, Onboarder will put all info into new folder already created [HERE](#).

## **Key Info:**

*All information and documents need to be in folder. If not, when sent to IT for adding to system, they will say no*



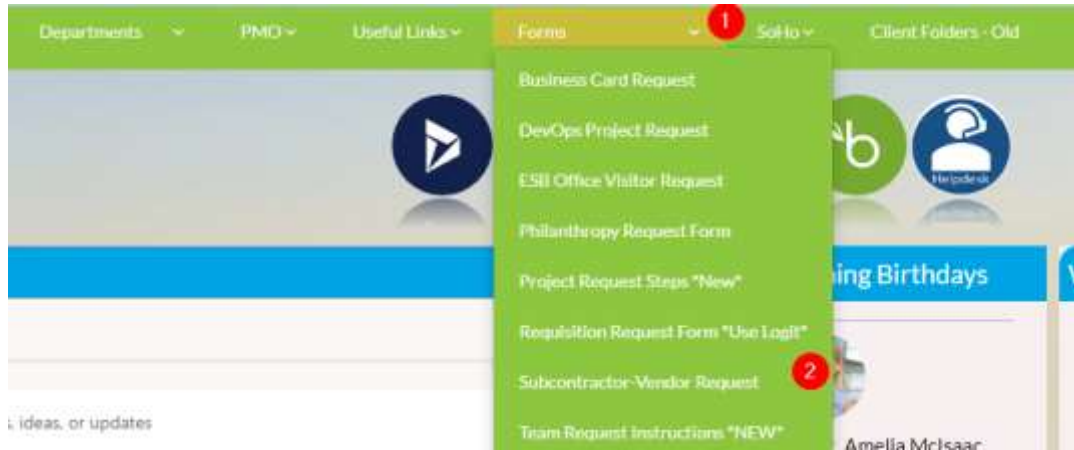
Name	Modified	Modified By
1 Template	August 26, 2021	Alan Carlock
1796408 Alberta Ltd	May 18, 2017	Anthony Martin
Accenture	May 3	Alan Carlock
Advantage Business Systems Limited	February 15, 2017	Scott Solis
Agentibus Technologies, LLC	February 5, 2021	ZZ_Archive_00210715-Dm
Agilus Consulting Inc	June 1, 2018	Alyssa Duffy
Alan_CooperSmith	February 15, 2017	Scott Solis
Alan_Goodman	February 15, 2017	Scott Solis
AMG	February 15, 2017	Scott Solis
Aquarius & Taurus GmbH - HP5	April 4	Chloe Lounds
ArcticTech Solutions Inc.	October 22, 2017	Anthony Martin
Artware	May 16	Chloe Lounds



# Filling out the Onboarding

## Form

Use the Form on the US Portal, "Subcontractor-Vendor Request". This should be filled out by a Resource Manager. Someone else with full knowledge of the legal terms and financial agreements can also fill this out.



The person filling out the form should fill in as much detail in the yellow area as possible and then click Save. It is important to choose a value for "***Is this Subcontractor Already an Approved Vendor***": If there are already legal documents in place between the Vendor and HSO, you can choose "Yes". If not, please choose "No". Once all fields in Yellow are completed, click Save. The next step in the flow is determined by the value of "Is this Subcontractor Already an Approved Vendor".

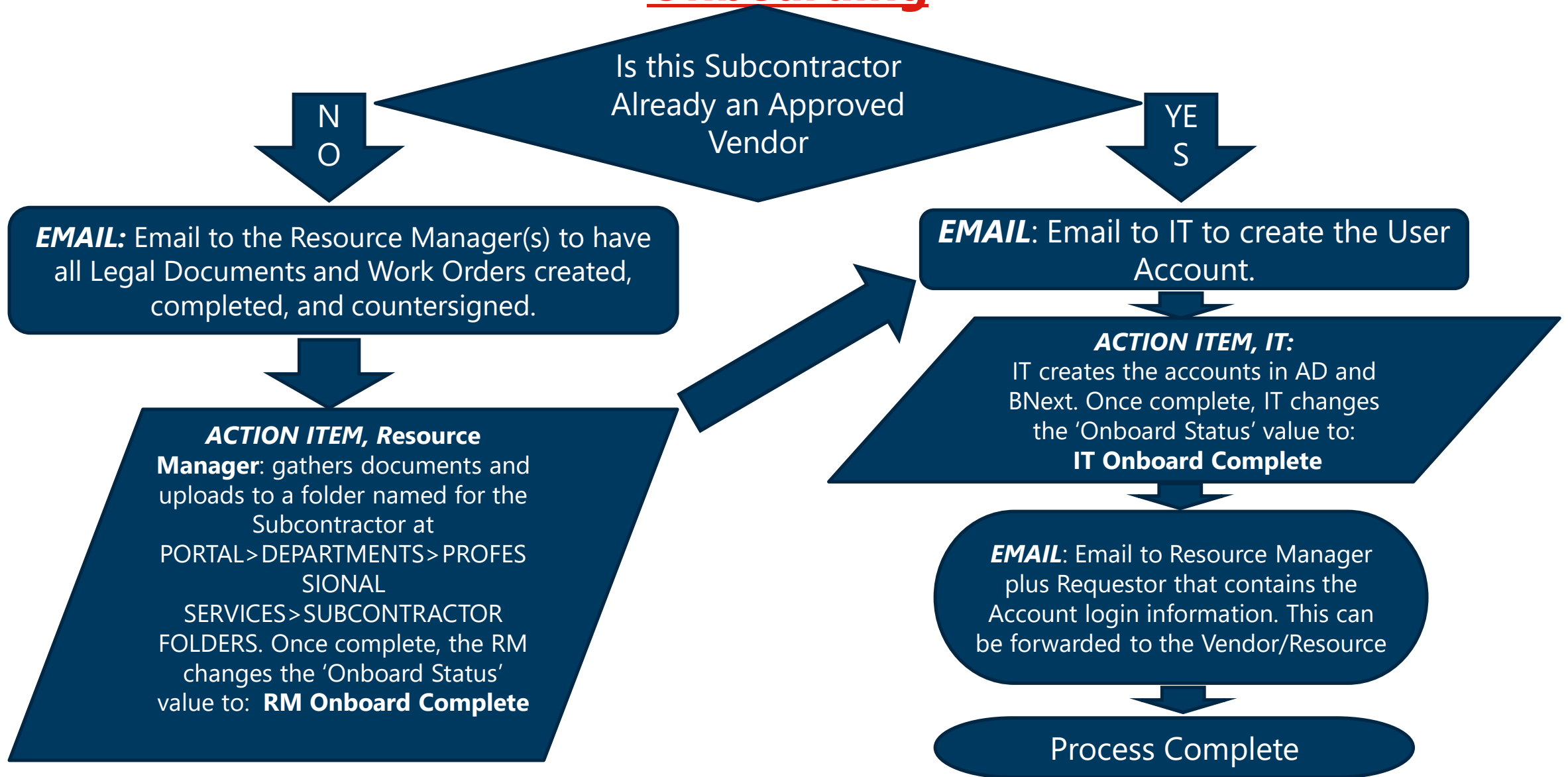
A screenshot of the 'Subcontractor-Vendor Request' form. The form is divided into two main sections: a yellow highlighted area for general information and a white area for legal and account details. The yellow area includes fields for 'Which Entity \*' (radio buttons for HSO Canada, HSO ES, HSO Iceland, HSO ProServ), 'Subcontractor Company Name \*', 'Resource Full Name', 'Resource Current Email Address', 'Is this Subcontractor Already an Approved Vendor?' (dropdown), 'Resource Phone Number', 'Resource Start Date', 'Solution Line \*' (dropdown), 'Hired for Specific Project? Which?', 'Subcontractor COST to HSO', 'Subcontractor Rate to Client', 'Team Name (If Applicable)', 'Does User Need an HSO Email Address?', 'Does User Need Bnext Timesheet Access?', and 'Onboarding Notes'. The white area includes 'Legal Documents and WO Sent to Sub Company', 'Legal Documents and WO Returned and Uploaded to Portal', 'Account Name', 'Account Password', 'Email Address', 'User Activation Date', 'Bnext Account Created?', and 'Onboard Status'. A blue callout box points to the 'Onboard Status' dropdown with the text 'Do not change this value when beginning this form'. At the bottom right, there are 'Save' and 'Cancel' buttons.



# Process Flow for Subcontractor/Vendor

The next step in the flow is determined by the value of "Is this Subcontractor Already an Approved Vendor".

## Onboarding



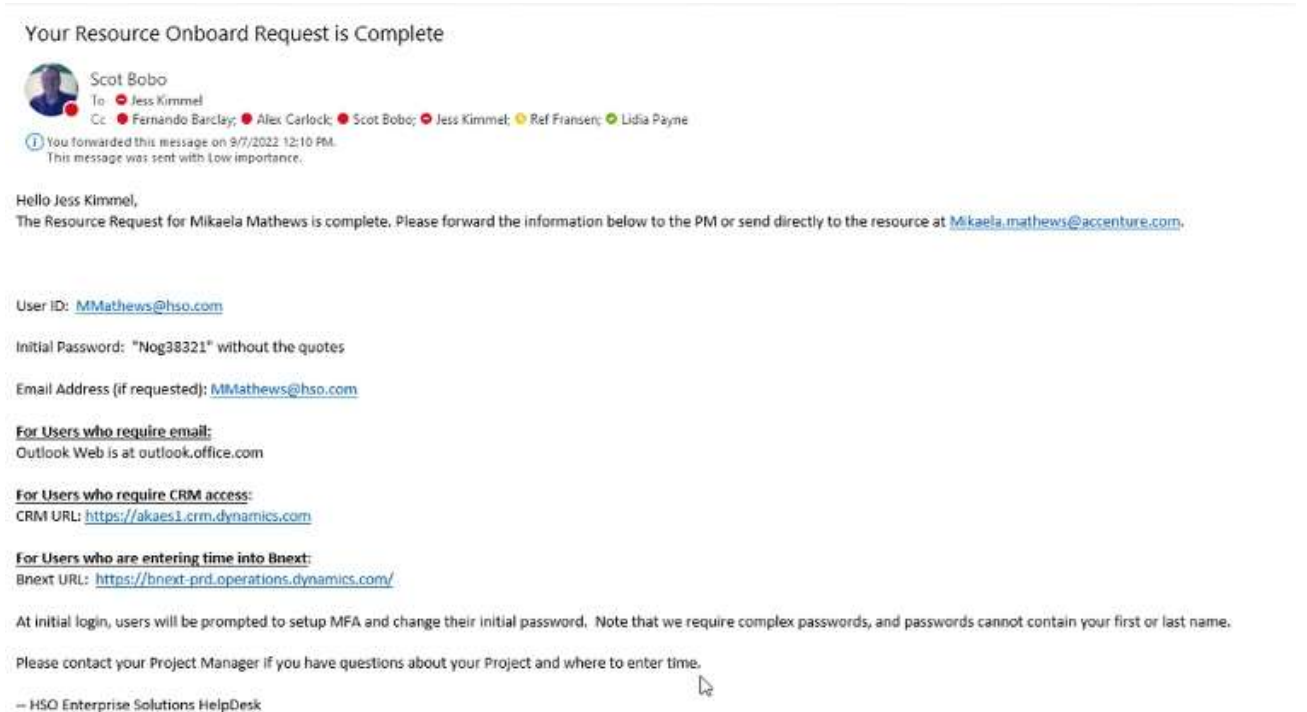
# Sub-Contractor Request Cont'd:

4. Once completed, this request is automatically routed to the IT department for account creation and setup. Emails automatically go to requester and IT.

5. Once approved and account is set up, IT will route notification of completion back to resource manager via email. *Shown to the right*

6. Resource Manager will send account credentials to the subcontractor, along with work instructions for Bnext. SL Lead and PM will be copied so they can request resource access to their project.

7. Onboarder will then send email to finance team (Kisha, Julia, Sharavana) with link to Sharepoint folder with all information.



## Final Steps:

8. After email sent to finance team, Onboarder will then go to Finance folder located [HERE](#).  
Open Subcontractor Master List excel sheet

9. Add names and information. Client Billing rate will come from individual/project SOW

10. IT will create subcontractor info in Bnext. Onboarder will go to Bnext to put in Cost and Client rate

- > Go to legal entity > Set up
- > Subcontractors by legal entity > click New fill out information

11. After this, Sub-Contractor is ready to go!

← ↻ hps://bnext-prd.operations.dynamics.com/?cmp=DAT&mi=P50OperatingUnit

Finance and Operations    P50 > Common > Resources

Save + New Delete Options

New (Alt+N) New

Filter

Resource	Project	Effective	Expiration	Cost rate	Currency
		9/12/2022	Never	0.00	USD
Mikaela Mathews	CAM04001: D365 Finance...	9/12/2022	Never	220.00	USD
Mikaela Mathews	CAM04003: D365 SOW2 ...	9/12/2022	Never	220.00	USD
Adnan Khalil		8/23/2022	Never	28.00	USD
Abdul Wahab		8/22/2022	Never	38.00	USD
Tammy Calnon		8/8/2022	Never	200.00	USD
Farooq Ahmad		8/8/2022	Never	30.00	USD
Gajendra Pareek	CAM04003: D365 SOW2 ...	8/1/2022	Never	175.00	USD
Kylie Walsh	CAM04003: D365 SOW2 ...	8/1/2022	Never	220.00	USD
Mark Franco	CAM04003: D365 SOW2 ...	8/1/2022	Never	220.00	USD
Phillip Renslow	CAM04003: D365 SOW2 ...	8/1/2022	Never	220.00	USD
Steve Mech	CAM04003: D365 SOW2 ...	8/1/2022	Never	220.00	USD
Thu Ngo	CAM04003: D365 SOW2 ...	8/1/2022	Never	106.00	USD
Altan Kalayci	CAS02002: D365 Finance ...	8/1/2022	Never	145.00	USD
Khawar Ahmad		8/1/2022	Never	28.00	USD
Jenia Walker		7/25/2022	Never	125.00	USD
John Baron		7/25/2022	Never	125.00	USD
Igor Kivets	GOD01001: Godiva D365 ...	7/25/2022	Never	100.00	USD
Alexey Smirnov	GOD01001: Godiva D365 ...	7/24/2022	Never	100.00	USD
Gajendra Pareek	CAM04001: D365 Finance...	7/24/2022	7/25/2023	175.00	USD
Pavan Adabala		7/12/2022	Never	90.00	USD
Regine Ades		7/6/2022	Never	16.00	USD
Umer Baig BS	POW02003: D365 Finance...	7/1/2022	Never	225.00	USD
Cory Johnson		6/20/2022	Never	150.00	USD
Phillip Renslow	CAM04001: D365 Finance...	5/22/2022	Never	220.00	USD

Excel - Subcontractor Master List - 2021										Search (Ctrl + F)			
File Home Insert Layout References Formulas Data Review View Automation Help													
Editing													
Clipboard Font Styles Tables Layout Data Tools													
Font Color Background Color Text Color													
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the results company



Thank you for your  
time and attention!

Devin Simon – Senior Financial Analyst –  
devinsimon@hso.com

**Driving  
Improvements  
in Business  
Performance**