

## III The EOR pre-agreement process | What to expect

- 1** The university department identifies the need to hire a global employee.  
*A CU Global Employee is defined as any employee of the University of Colorado, regardless of their country of citizenship, permanent residence or tax residency, whose work site is located outside of the U.S. and its territories for any relevant tax period within a calendar year. This includes employees who are telecommuting under an arrangement specifically approved by their business unit that permits the employee to work remotely in an international location (not including consultants, contractors and volunteers).*
- 2** The university department fills out the Generate a quote form, which is automatically routed to Safeguard Global.  
**EOR services were competitively bid by CU Purchasing and Safeguard Global was awarded a system-wide contract.**
- 3** The university department will receive the following from Safeguard Global for review:
  - **Exhibit** for in-country social costs and general agreement information (must reference MSA)
  - **Proposal** with monthly cost and company information (must reference MSA)**Safeguard Global will reach out to the submitting department to schedule a meeting to review the Exhibit and Proposal and to answer general questions.**
- 4** If the university department accepts the proposal, the department will create a SPO Requisition in CU Marketplace and attach the proposal and exhibit from Safeguard Global.
- 5** The SPO Requisition will be received and reviewed by Purchasing for completeness. They will then issue a PO to Safeguard Global. Once the PO is issued, the work can begin.  
**The Exhibit signed via DocuSign is required to commence work. Invoicing is sent directly to the department. Once the invoice is paid and received, Safeguard Global will schedule a project introductory call with the applicable university department leaders.**

## Onboarding process | What to expect

### TIP: GETTING STARTED

Client access & owner acceptance are required before Step 1 can begin.

#### ACTIONS

Client

Safeguard

### Phase 1: Client onboarding *(client set up & worker contract – 3–5 days)*

1

Client

Client will submit the onboarding form for their hire(s) through our Safeguard Global platform.

Invoice sent

2

Client

A contract draft will be provided for your review and approval.

3

Safeguard

Safeguard Global will send a welcome communication to the worker and initiate right-to-work and background checks (upon request)\*.

4

Safeguard

Safeguard Global will send the contract to the worker for review and signature.

Payment

Deposit & setup payment expected.

### Phase 2: Worker onboarding *(worker contract acceptance & onboarding activities/Day 1 prep – 2 weeks, dependent upon notice period & background checks; notice period may extend)*

5

Safeguard

Contract to be accepted and signed by the worker.

6

Safeguard

Final onboarding documents will be collected from the worker.

7

Safeguard

Safeguard Global will introduce you to your operational point of contact and provide platform training.

*\*Background check results may take 5–10 business days to complete upon worker submission of requested information.*