

## CONSULTANT AGREEMENT PROCESS CHECK OFF

A completed Consultant Agreement is to be turned in no later than the date listed on the Due Dates for Consultant Agreement for the required Board Meeting (see Due Dates online). Place Holders for Consultant Agreements will not be accepted (Place Holders – a copy of an unsigned or incomplete Consultant Agreement). **VERY IMPORTANT:** Any person who received wages from the District as an employee or a substitute during the calendar year (January – December) will be disqualified as a potential Consultant during that same calendar year.

### SUBMITTING A CONSULTANT AGREEMENT

\_\_\_\_\_ Send the completed Consultant packet to the Office of Business Services. A completed Consultant packet will include:

\_\_\_\_\_ An Agreement for Consultant Services with all required signatures (please print on 30-0-326: [form online](#))

\_\_\_\_\_ Completed W-9 signed by the Consultant ([form online](#)) **NOTE: The name on both the Consultant Agreement and the W-9 should match**

\_\_\_\_\_ Memo (form online), Pamphlet, Website print out containing the following information:

1. Biographical information on each presenter including their qualifications
2. A comprehensive description of the program/activities to be presented; i.e., scope of work (Goals, objectives, purpose)
3. Schools participating in the event and the employee groups
4. Expected outcomes

\_\_\_\_\_ Pre-Encumbering Requisition (see description below)

### PRE-ENCUMBERING REQUISITION

\_\_\_\_\_ Upon submittal of consultant packet, send purchasing requisition electronically. After approval of the board, all pre-encumbering requisitions will be submitted to Purchasing to be processed as PO's. The requisition will need to contain the following information in the body ([see example](#)):

1. Vendor Name – Should match the name on both the Consultant Agreement and W-9
2. Description – “Consultant” must be in the description as well as a description of services provided, should include amount not to exceed, the dates of service(s) & location
3. Description – the following statement, “Pre-Encumber entire contract, *monthly invoice to follow*” (monthly invoice notation, only if more than one payment will be made)
4. Board Approval Date
5. Full amount of Contract

\_\_\_\_\_ If there is a special approval site “stop”, it is the responsibility of the school/department to follow up to make sure the requisition has been approved and electronically “sent” from the special approval site.

**NOTE:** All questions regarding Pre-Encumbering funds should be directed to the Fiscal Services contact in charge of the resource number being used.

### PAYMENT FOR CONSULTANTS (ONE TIME AND MULTIPLE PAYMENTS)

\_\_\_\_\_ Send a printed copy of the **Confirmation of Consultant Services** form ([form online](#)) along with an original invoice, to Latonya Thompson in the Office of Business Services. Original signatures must be on the Consultant and Principal/Department Head lines of the **Confirmation of Consultant Services** form (or invoice). The Confirmation of Consultant Services form and consultant invoice **must be** submitted together in order to be processed for payment. If invoice is not available at the time of service, please ensure one is made available before submitting your form.