

**EMPLOYMENT PROCESS FOR OBTAINING CONSULTANT SERVICES**

**Attachment B**

**Instructions for Processing Consultant Services Contracts**

**Steps**

1. *Determine if the individual should be hired as an employee or a contractor. Complete Attachment A questionnaire.*
2. *Complete the Consultant Services Contract Request form (8-74) in detail. Required information:*
  - a. Individual or company providing the services.
  - b. Description of services to be provided to district.
  - c. Costs or charges to district (include daily or hourly rates, airfare, etc.).
  - d. Timelines when the services will be performed or received.
  - e. Budget Administrator's approval.

Note: This is not a binding document. It is for district use, informational purposes only.

3. *Complete the Consultant Services Contract Request form (8-74-8) in detail. Required information:*
  - a. Exact name of firm, agency, corporation, or consultant/presenter. This name must be the same as the one that will be printed on the invoice and subsequently the payment warrant. No sub-contract payments are allowed; i.e., the contract is with Psychological Leaders Inc., yet the desired payment method is directly to the psychologist working at your site. The payment must be made, in this example, to Psychological Leaders Inc.
  - b. Date of contract - the date that the contract is to commence should not precede the dates of the approval (signature) by both parties. **No** services should be rendered before the contract is completed and approved.
  - c. Services to be rendered - minimum required information:

Detailed description of services to be rendered by the contractee. The description shall include the dates and times of any presentations, due date(s)

## EMPLOYMENT PROCESS FOR OBTAINING CONSULTANT SERVICES

of finished product, materials to be provided in relation to service, where the services are to be rendered, and, if necessary, qualifying language on the quality of the end product in relation to final payment. Use exhibits (attachments) if necessary.

Note: Verbal agreements or understandings are bad business practice. Put them in writing.

- d. Payment to be made by district - required information:
  - (1) Total sum of contract
  - (2) Payment increments; i.e., daily or hourly rates
  - (3) Payment timelines; i.e., monthly, quarterly, or lump sum
  - (4) Detail of payments
    - (a) Amount for services to be rendered
    - (b) Materials to be provided
    - (c) Transportation either reimbursed with receipts or a flat fee charged by contractor
    - (d) Mileage: from where to where and at what rate per mile
    - (e) Accommodations: how many nights and at what rate per night
    - (f) Meals: how many, what limit per meal, and is it a flat rate or reimbursed with receipt
    - (g) Other expenses: itemize description, costs, and method of payment
- e. Contract period: try to stay within the fiscal year, July 1 through June 30, if possible.
- f. Signatures: official signatures are required by **both parties**.
  - (1) Service provider (contractee): either the person named on the contract or an officer of the corporation

## EMPLOYMENT PROCESS FOR OBTAINING CONSULTANT SERVICES

- (2) District
  - (a) Under \$15,000: Assistant Superintendent, Associate Superintendent, Deputy Superintendent, or Superintendent
  - (b) Over \$15,000: Associate Superintendent, Deputy Superintendent, or Superintendent
- g. Tax identification number is required by IRS.
4. *A Purchase Requisition will not be required.* The contract will be encumbered under its own number assigned by the Finance Department. This will prevent double expenditure of the assigned budget.
5. *Retain a copy of the documentation for site files.*
6. *Submit the following package of documents to the appropriate Assistant/Associate Superintendent for processing:*
  - a. Consultant Services Contract Request form (B-74) signed by Budget Administrator
  - b. Consultant Services Contract form (B-74-B) signed by Budget Administrator
  - c. If payment is required on the day services are provided, submit an itemized invoice, signed off by the responsible staff member. (Please allow ten (10) working days and personally notify the finance clerk.)
7. *Invoice Procedures*

**No payment will be issued without an itemized invoice.**

  - a. Must be from the consultant: an official invoice on their letterhead, not the district's letterhead. Informal invoices on plain paper must be signed by the contractor.
  - b. The consultant's tax ID number shall be included on the invoice.
  - c. Itemization of charges must match the details on the contract; i.e., payment schedule, materials, mileage, transportation, etc.
  - d. Payments to be made upon the completion of the service (same day) must be pre-requested.

**EMPLOYMENT PROCESS FOR OBTAINING CONSULTANT SERVICES**

- e. The *invoice* must be signed "*Okay to Pay*" by the staff member managing the contract.
  - f. Send invoice to the Finance Department for processing.
8. Call Director of Finance with any questions.