|  |  |
| --- | --- |
| Hiring a Consultant CHECKLIST |  |
| **DO NOT Start any work or make out of pocket purchases or commit anything before Notifying Business Services** **Preferably as far in advance as possible. Ask questions so we can guide you. NO Confirming Orders- Forms to** **complete are: Pre-Hire, Scope of Work, Estimate/Quote and sometimes a Sole Source Justification form may** **be required. If over $15,000 or more you must submit 3 quotes (please get clarification from Business Services)** |  |
| **Requestor Responsible for the following: Complete the necessary forms provided by Business Services** |  |
| Vendor: Name PI: Approval  |
| Obtain Vendor Address  |  |
| Vendor Estimate (Email, website, etc.) |  |
| Obtain Contact information (Phone number, Email, Fax) |  |
| Have you used this Vendor in the past? |  |
| What is the business purpose- how will this benefit the University (Research) |  |
| Account number information |  |
| Obtain Account Manager Approval |  |
| Dates start to finish (on-going, onetime payment, etc.) |  |
| **Business Services Responsible for the following:** |  |
| **Business Services receives request -**  |  |
| **Business Services reviews to make sure all information is included-will call requestor if more information is needed** |  |
| **Business Services to Obtain Account Manager Approval if not obtained by requestor** |  |
| **Within 48 hours check to see if Vendor is in the system and if not create Vendor request** |  |
| **Request W-9- or W-8 if Foreign, once received upload or provide vendor with information to upload-****wait time normally 4-5 business days for a response** |  |
| **Vendor Desk turn around ranges 5-6 days depending if more information is needed or if request is denied** |  |
| **Email received vendor has been created (Vendor #: )** |  |
| **Business Services enters all information along with all supporting docs and submits request** |  |
| **Routes to Chair and or CAO for approval allow 3-5 business days, if returned by CAO or Chair allow 5-7 business days** |  |
| **Routes thru to Contract Services** |  |
| **Allow 3-6 weeks for processing if all approvals are in order and not returned to Business Services. If returned,****Business Services will resubmit with corrections. Allow additional 10 days for complete approval** |  |
| **Once approved- Business Services is notified and Vendor is notified .No work can start until** **Requestor has a copy of approved agreement** |  |