Engaging a Consultant at Boston University

**Contract Request Form**
- Requisitioner submits the Contract Request Form including key details:
  - Consultant’s name and contact information
  - Detailed proposal or Description of Services (DOS) with a clear set of deliverables and length of engagement
  - Indication of whether we will engage the consultant in the future
  - Cost
  - Account category to be charged: cost center; I/O; WBS element
  - Stipulation of FERPA, HIPAA, or PII information involvement or accessibility by consultant
  - Additional details providing insight into engagement

**Evaluation of Risks & Contracting Vehicle**
- Sourcing & Procurement evaluates Contract Request Form and determines how to contract the engagement:
  - Possibility of using consultant in the future
  - Access to sensitive information including FERPA, HIPAA, or PII
  - Cost of engagement
  - Special risks as defined by General Counsel
  - Length of engagement

**Consultant Registration**
- Based on information gathered, Sourcing & Procurement decides on the contracting vehicle:
  - Consulting Agreement
  - MSA with Statement of Work (SOW) or DOS
  - Service Order
  - External Service Provider (ESP) Form*
  - Registration and Contract for Individual Consulting on Research (RCICR)*

**Worker Classification**
- In all cases, except for the ESP and RCICR processes, the consultant will receive an invitation to register as a supplier:
  - Consultant registers with Boston University and on the Ariba Network
  - Individuals and sole proprietors answer additional questions to determine worker classification according to IRS guidelines (See next step)
  - All suppliers answer Conflict of Interest questions and if a conflict is identified, the Compliance Committee reviews the engagement and determines allowability

**Accounts Payable**
- Accounts Payable considers several factors to determine if the consultant is an Independent Contractor or an Employee, some of which are:
  - The worker is free from the control and direction of the hiring entity in connection with the work being performed
  - The worker does not solely rely on the hiring entity’s business as its sole source of income
  - The worker is customarily engaged in an independently established trade, occupation, or business of the same nature of the work performed by the hiring entity

**Contract**
- As the registration is being completed, Sourcing & Procurement negotiates a contract in conjunction with the stakeholders**:
  - A Buyer prepares the appropriate contract and works with the consultant to facilitate a mutually beneficial contract to both parties
  - Stakeholders review edits proposed, provide feedback, and approve the final draft of the contract
  - The finalized contract is sent for signature***

**Purchase Requisition (PR)**
- Once the consultant is registered and the contract is executed, the Requisitioner is asked to submit a PR:
  - A Buyer sends the executed contract to the Requisitioner through DocuSign.
  - Requisitioner creates a PR in Guided BUtying and attaches the executed agreement
  - Once the PR is fully approved, a PO is generated and sent to the consultant through the Ariba Network. Only after the PO is issued, a consultant may begin work on the new engagement.
  - The consultant transmits the invoice through the Ariba Network when the engagement is completed.

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* Available from the Accounts Payable website
**Contract negotiations can take up to two weeks and are largely dependent on the responsiveness of the suppliers and the complexity of the engagement
***Contracts can only be signed by Trustees of the University or individuals with delegated authority