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**
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
- All suppliers answer Conflict of Interest questions and if a conflict is identified, the Compliance Committee reviews the engagement and determines allowability

**Worker Classification**
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 BUying 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.

**Independent Consultant:**
- The Contract Request Form is approved and the supplier is asked to agree to BU’s standard terms & conditions on PO
- Other agreements (e.g., Performance Agreement, Speaker Agreements)

**Employee/Student:**
- The Contract Request Form is denied with a note stating the consultant was deemed an employee or student and should be paid on BU payroll

* 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