

PROCEDURE FOR HIRING A CONSULTANT

The process we would like to implement and communicate to campus:

1. Requests for consultant setup should be routed to Purchasing
2. Purchasing will work with the PI/campus customer and the consultant to execute Lehigh's Professional Services Agreement (which ORSP should make available on their website, replacing the consulting agreement).
3. Purchasing will develop the Statement of Work that defines the engagement in detail: start/end dates, scope, deliverables, location, rates (T&M versus fixed fee). If during this process, it becomes clear that a determination of type of payment/setup is needed, Purchasing will engage A/P and Payroll to make the final determination prior to proceeding further in the process.
4. Once a determination is made, Purchasing will finalize the PSA and SOW.
5. Purchasing will have the consultant complete a W9 so we can set them up in Banner for payment.
6. Purchasing will discuss the insurance requirements with the consultant and determine the type needed and appropriate coverage requirements (ie Professional Liability, Worker's Comp, Automobile). The consultant is required to provide a Certificate of Insurance evidencing the required coverage.
7. Once the PSA, SOW, W9 and COI are completed, Purchasing will create either a service order (unencumbered for T&M) or purchase order (encumbered for fixed fee) in Banner and furnish to the consultant.

In the event that ORSP or A/P or Payroll are engaged directly to make a payment/setup determination prior to Purchasing involvement, those departments will then engage Purchasing into the process to complete the steps identified above, ensuring process consistency regardless of "point of entry".