The Consultant Process

School submits Packet to CBO
•Consultant Agreement • W9 • Information Memorandum •
• Pre-encumbering Requisition • Biographical Information •

CBO processes packet and submits to board

Board approves consultant agreements

CBO Separates packet and retains yellow copy

School Site

Receives:
- Pink copy of agreement
- All backup information
- Green copy (if not Spec. Fund.)

- After services are rendered, the school site will prepare a "Confirmation of Consultant Services Form".
- Consultant will sign "Confirmation Form" and submit invoice. School will submit to CBO.
- Invoice is needed for both one time and multiple payments.

Purchasing

Receives:
- Original signed requisition
- Copy of W9
- Copy of consultant agreement

Purchasing will print PO's for <u>ALL</u> consultant requisitions received (one time and multiple payments). PO's will then be sent to Fiscal.

Fiscal

Receives:
- 2 whites from agreement
- Copy of green agreement (if Spec. Fund.)
- Copy of W9

Fiscal will receive the yellow, pink, and white copies of all consultant PO's after board meeting.

One Time and Multiple Payments

Consultant will sign Confirmation of Consultant Services Form and submit invoice

School will submit signed Confirmation of Consultant Services Form and consultant invoice to CBO

CBO will review and record the confirmation form and invoice before submitting to Fiscal for payment

Fiscal will process payment from Confirmation of Consultant Services form and invoice using the pre-printed PO at her desk.