Independent Consulting Agreement Process

When NOGA is received, RDS confirms with PI that the ICA should be initiated on the project.

PI finalizes budget with grants mgr and confirms ICA.

Grants mgr sends final budget to RDS and follows up with OSR for work tags.

RDS drafts SOW with PI.

If payment exceeds $2,500 or requires special terms, RDS sends contractor SOW & tax questionnaire and communicates instructions.

RDS sends SOW and completed tax questionnaire to Tax Office for review/approval (Subject Line: RDS Independent Contractor Request, ICA Last Name, First Name).

If payment is less than $10,000 per year, RDS will also request waiver.

Tax reviews the SOW and questionnaire and notifies RDS either that it is approved or not approved.

If approved, Tax will return the SOW and questionnaire to RDS with Adobe stamp approval.

If the ICA is not approved by Tax, RDS will return to grants mgr to process as ad hoc employee.

If the ICA and waiver are approved by Tax, RDS initiates the ICA in STARS and routes to OSR for waiver approval.

OSR reviews the contract and approves the waiver and notes in STARS.

If the under $10k waiver is approved by OSR and no special terms are needed, RDS will return to grants mgr to process a PO, a contract is not needed.

If the ICA is approved by Tax and the contract is over $10k or requires special conditions, RDS initiates the ICA in STARS and routes to OSR.

OSR creates contract and OSR Manager reviews the drafted contract.

OSR sends the unsigned contract and approved Tax attachment to grants mgr along with the routing sheet (which should contain the names of anyone who will need access to the Box folder, including grants mgr, OSR, RDS and cost center buyer).

Grants mgr initiates procurement process in GMS*.

Grants mgr sends unsigned contract to ICA for signature.

Grants mgr receives partially executed contract back from ICA.

Cost Center Buyer creates contact and routes through GMS*.

Cost Center Buyer sends the contract id.

Grants mgr sends the partially executed contract, approved Tax package and routing sheet to Contracts@georgetown.edu with Subject Line: Contract No., ICA Last Name, First Name.

Contracts sets up Box folder and gives permission to the folder based on names on the routing sheet.

Contracts routes contract for signature.

Contracts adds fully executed contract to Box folder, and uploads in GMS as an attachment.

Contracts emails all contacts listed on routing sheet to let them know the contract has been executed.

*For questions related to GMS processing, please visit: http://gms.georgetown.edu/training http://gms.georgetown.edu/need-help
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Grants mgr sends unsigned contract to ICA for signature. Grants mgr receives partially executed contract back from ICA. Cost Center Buyer creates contact and routes through GMS*. Cost Center Buyer sends Grants mgr the contract id. Grants mgr sends the partially executed contract, approved Tax package and routing sheet to Contracts@georgetown.edu with Subject Line: Contract No., ICA Last Name, First Name. Contracts sets up Box folder and gives permission to the folder based on names on the routing sheet. Contracts routes contract for signature. Contracts adds fully executed contract to Box folder, and uploads in GMS as an attachment. Contracts emails all contacts listed on routing sheet to let them know the contract has been executed.

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Independent Consulting Agreement Process for annual payments between $2,500-$10,000 with no special terms

Independent Consulting Agreement Process for annual payments less than $2,500 with no special terms