



Consultant Agreement Procedures

Consultant Agreements are necessary for services provided by companies and individuals who will be compensated by SLOCOE but are not employed by SLOCOE or public schools in California, following IRS criteria. A fillable template for the [Consultant Agreement](#) may be used as a beginning point for recording specific terms of the agreement. The consultant agreement is accompanied by other forms which are necessary for ensuring the safety of students, reporting of taxes, budgeting and processing payment.

Step-by-Step Instructions and Key Elements

1. Initiate agreements at least 3 weeks prior to requested services in order to allow time for the review and approval process.
2. Customize the agreement template and include an Exhibit A that provides specific details on deliverables, dates for deliverables, consultant remuneration, and scope of service. For additional guidance, see [How to Write Exhibit A for Consultant Agreements](#).
3. Prepare and gather all necessary components.
 - [Cover Sheet](#) (completed with account lines) – this is used by the Business Office.
 - Consultant Agreement, completed from the template
 - [Classification Criteria for Employee vs. Independent Contractor](#) completed by Program Director.
 - [Department of Justice Exemption from Fingerprinting](#), signed by the Program Director and Department Head or Assistant Superintendent. The DOJ waiver is used when the consultant will have no unsupervised access to students. Otherwise, an affidavit of fingerprint clearance must be provided.
 - [W-9 Form](#) for tax reporting purposes, to be mailed to the consultant along with 1099 Information reporting memo. If needed, a [W9 Form – Spanish](#) is also available. NOTE: A W9 form may already be on file for your consultant or service provider. To find out, call x214 or x218. If the form is already on file the consultant will not need to complete it again.
 - Non-residents of California must complete [California Form 590](#) (Click here for [Form 590 Instructions](#)); and [California Form 887](#) (Click here for [Form 887 Instructions](#)).
 - Consultants must answer the question at the bottom of the third page of the Consultant Agreement regarding employment with SLOCOE or a school district within SLO County (including Cuesta College).
4. Route the agreement for review and approvals. [Adobe Sign](#) is recommended for this process. Initials or signatures are obtained from the following:
 - Program Director
 - Department Head
 - Executive Assistant, Business Services – for tracking purposes
 - Fiscal Specialist assigned to the program – for account line verification
 - Director of Fiscal Services – for budget approval
 - Assistant Superintendent for Business Services – for review of contract and Exhibits
 - Superintendent or Designee – signature
 - Consultant
6. When the agreement with all forms is fully executed, it may be provided as an attachment to the requisition in QSS. The originator and consultant receive copies of the Purchase Order. Accounts Payable receives all original, signed paperwork.
7. Upon completion of services, the Consultant sends an invoice for payment. **Payment for consultant services may not be made by credit card.**