

## Consultancy Procedure

### What is the procedure for completing the consultancy documents and sending them to Human Resources/Baltimore for processing?

To understand the procedure used for completing consultancy paperwork prior to the start of a consultancy, it is important to understand the three documents that form the contract with the consultant:

- (a) [Consultant Requisition](#)
- (b) [Scope of work \(see sample\)](#)
- (c) [Consulting Agreement](#) (or [Consulting Agreement for Photographic Services](#))

1. The hiring manager should complete these three documents.

- (a) The [Consultant Requisition](#) should be completed (be sure to complete all sections) by the hiring manager and signed by the appropriate CRS authorizing official in the host office.
- (b) The [scope of work](#) should be completed by the hiring manager consistent with the terms provided in the Consultant Requisition, including the period of performance and the costs and expenses.
- (c) The [Consulting Agreement](#) (or [Consulting Agreement for Photographic Services](#)) should be completed by the hiring manager with (1) the current date (please do not back date to the start date of the consultancy if the consultancy already started, and do not forward date to the start of the consultancy if the consultancy starts at a later date) and (2) the consultant's name inserted on page one.

2. Once the hiring manager completes these three documents as described above, the hiring manager sends these documents in scanned form directly to the consultant for the consultant's review and signature.

3. The consultant should review the three documents and, if in agreement, sign page 8 of the Consulting Agreement (or page 9 of the Consulting Agreement for Photographic Services) and return the documents to the hiring manager. If the consultant is not in agreement with any aspect of the Consultant Requisition or scope of work (the Consulting Agreement is a standard Agreement for all consultancies and is not revised), the consultant should communicate these issues to the hiring manager so that the documents can be revised as appropriate by the hiring manager and resent in scanned form by the hiring manager to the consultant for review. Once

the consultant is in agreement with the specific terms as stated in the Consultant Requisition and scope of work, the consultant should sign page 8 of the Consulting Agreement (or page 9 of the Consulting Agreement for Photographic Services) and return all three documents to the hiring manager.

4. When the hiring manager has received the signed Consulting Agreement from the consultant, the hiring manager should send the three documents—(a) the Consulting Agreement signed by the consultant, (b) the scope of work, and (c) the Consultant Requisition to Human Resources/Baltimore at [HRresponse@crs.org](mailto:HRresponse@crs.org) for HR's review.
5. If Human Resources has any questions regarding the consultancy, HR will contact the hiring manager for clarification.
6. Once HR obtains clarification or if HR has no questions, HR will provide final review of the consultancy documents and process the Consulting Agreement for HR's signature, returning the fully signed Consulting Agreement (or Consulting Agreement for Photographic Services), scope of work and Consultant Requisition to the consultant, copying any relevant CRS contact persons indicated on page one of the Consultant Requisition.
7. At this point, the contract documents are complete.

Please see the main consultants SharePoint page, [Working with Consultants](#), for more information on "Hiring a Consultant."