

Process – Consultants Service Providers

Supporting Documents/Forms

Before services commence, the department should complete and submit the following documents to the Purchasing Department for review and processing.

- **Scope of Work** — The SOW should clearly articulate the deliverables, expectations and responsibilities of both the Service Provider and the customer.
- **Independent Contractor Verification Worksheet** (*Sole Proprietor only*) — Determines Independent Contractor status.
- **Business Associates Addendum** — If services will involve the sharing of Protected Health Information (PHI), the provisions of the Health Insurance Portability and Accountability Act (HIPAA) apply. Please have Karen Pagliaro-Meyers sign prior to submission.
- **Client List** — List of Current Service Provider Customers.
- **Resume or CV**
- **Corporate Brochure**
- **Competitive Bids and Analysis** — Recommended always, regardless of \$ threshold.
- **Certificate of Insurance** — In accordance with the Service Provider Agreement
- **Requisition Checklist (Under Construction)**
- **Service Agreements DAF Policy (still valid?)**
- **Professional Service Categories** — Go to the [Purchasing Guide](#) for a list of the different types of Consulting Service Providers with their respective Commodity Code, Agreement for that Service Provider where applicable and PO only with SOW (Note: Agreement is not necessary for these Service Providers however a SOW is necessary.)

With each new Requisition, unless Purchasing has on file, a Master's Agreement, you must provide all the necessary Supporting Documents to process the Requisition. All Requisitions for Service Providers **REQUIRE SOW**; however some Service Providers **REQUIRE** an Agreement while others will only **REQUIRE** the PO to satisfy the contractual obligation.

Insurance

Prior to working with the Consultants, a Certificate of Insurance (COI) is **REQUIRED** which we reference in a separate section with a sample [ACORD COI](#). University departments shall review the insurance requirements on the University Risk Management website and comply accordingly. The Service Provider Grid referenced in the website outlines the insurance requirements per type of Consultant which may be of lesser value. Service Providers are used for specific tasks and for explicit periods of time. Service Providers can be business firms or individuals who are not Employees of the University.

<http://finance.columbia.edu/content/minimum-insurance-requirements-contracts>