

# RAISING A CONSULTANCY AGREEMENT AND PAYMENT

## Fund/Cost Centre Manager

## Contractor

## Finance & Resources

## Corporate Finance Division

## Faculty Manager

Go to:  
<http://www.adm.monash.edu.au/workplace-policy/forms/#contractors>  
 Download:  
 - Letter for Agreement Schedule Information Request  
 - Contractor's Checklist

Fill in the following details on the Letter for Agreement Schedule Information Request:  
 - Contractor's Name  
 - Contractor's Address  
 - Date  
 - Address for Service of Notice (this should be the Fund/Cost Centre Manager's name and Faculty address).  
 - Insert Name of Contractor where specified

Forward Letter of Agreement to the Contractor for completion & signing.

Complete the Contractor's Checklist based upon the Letter for Agreement Schedule Information Request.  
 All questions have to be completed and form signed by the Cost Centre Manager.

**Note:** If the Contractor has no insurance, the Cost Centre Manager has to complete a Contractor Risk Assessment Checklist to waive the insurance. This can be found at <http://www.adm.monash.edu.au/workplace-policy/forms/#contractors>. **This form needs to be approved by the Cost Centre Manager and the Faculty Manager.**

Forward the following documents to Finance for preparation of the Agreement:  
 - Letter of Agreement Schedule Information Request Contractor's Checklist  
 - Contractor's Checklist  
 - Copy of Public Liability Insurance Policy  
 - Copy of Professional Indemnity Insurance Policy  
 - Copies of appropriate WorkCover certificates  
 - Contractor's Risk Assessment Checklist, if applicable

**Note:** Ensure that all documentation is complete, otherwise it will delay the process.

Answer all questions and provide copies of:  
 - Public Liability Insurance  
 - Professional Indemnity Insurance  
 - Appropriate WorkCover certificates

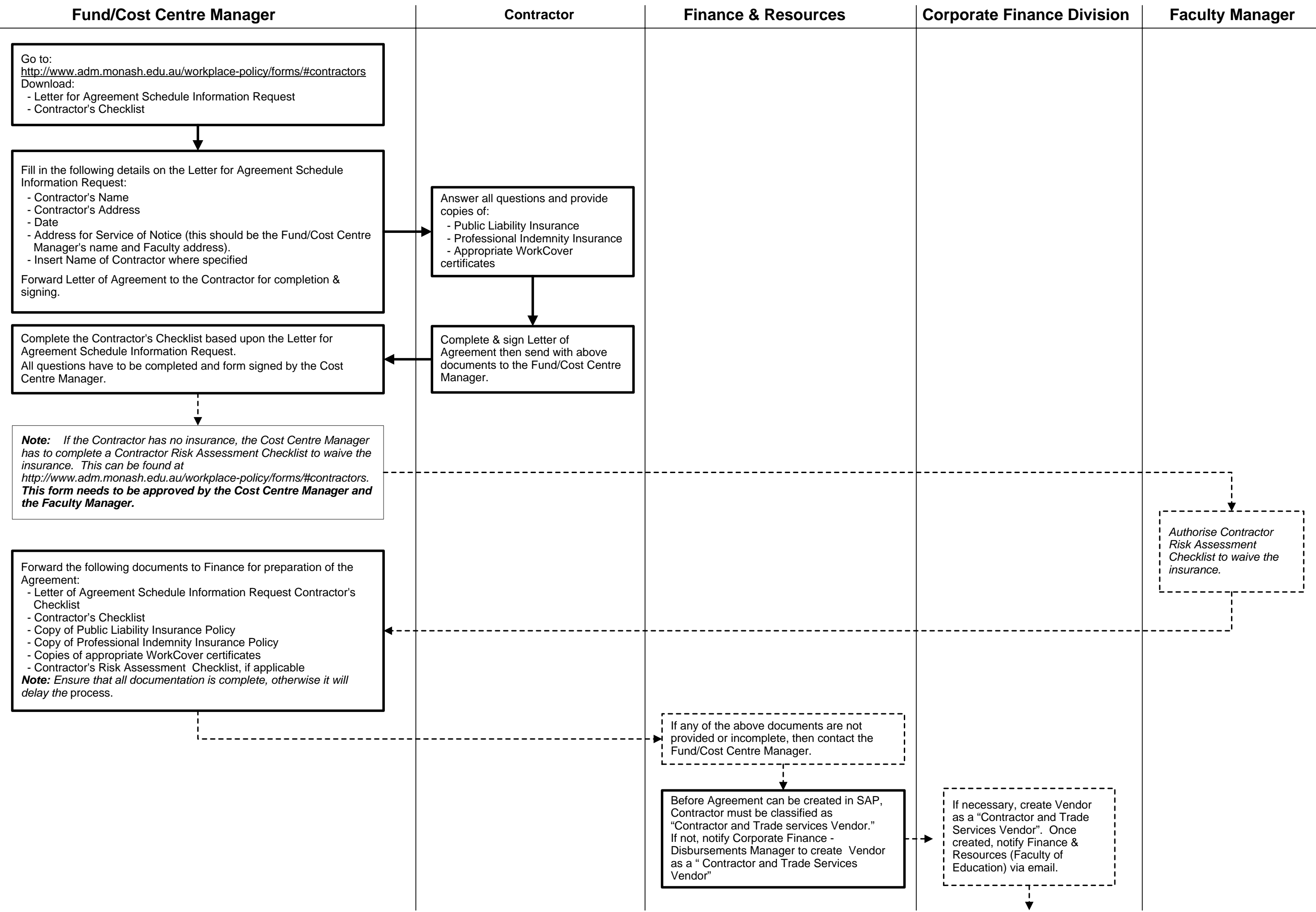
Complete & sign Letter of Agreement then send with above documents to the Fund/Cost Centre Manager.

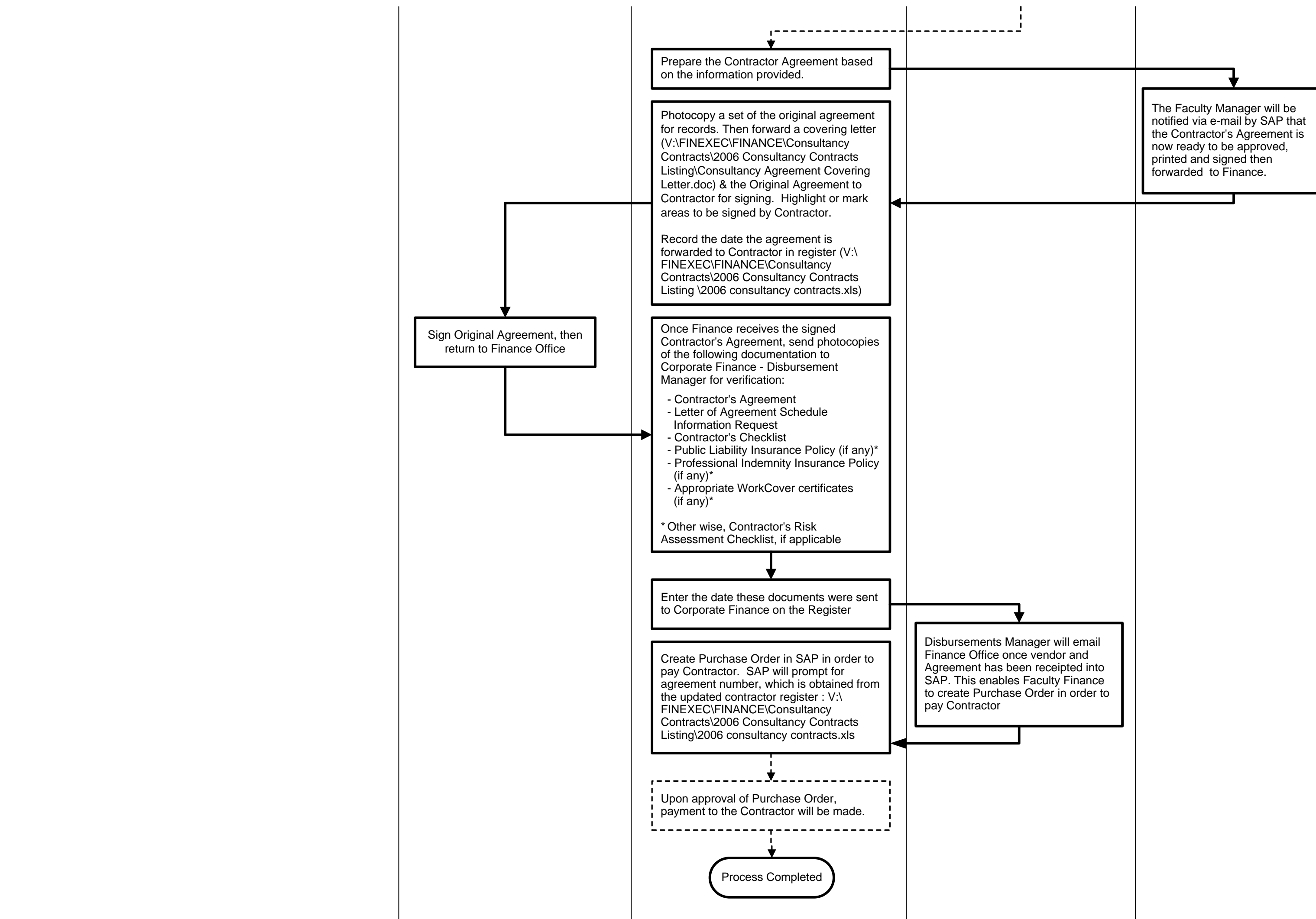
If any of the above documents are not provided or incomplete, then contact the Fund/Cost Centre Manager.

Before Agreement can be created in SAP, Contractor must be classified as "Contractor and Trade services Vendor." If not, notify Corporate Finance - Disbursements Manager to create Vendor as a "Contractor and Trade Services Vendor"

If necessary, create Vendor as a "Contractor and Trade Services Vendor". Once created, notify Finance & Resources (Faculty of Education) via email.

Authorise Contractor Risk Assessment Checklist to waive the insurance.





Prepare the Contractor Agreement based on the information provided.

Photocopy a set of the original agreement for records. Then forward a covering letter (V:\FINEXEC\FINANCE\Consultancy Contracts\2006 Consultancy Contracts Listing\Consultancy Agreement Covering Letter.doc) & the Original Agreement to Contractor for signing. Highlight or mark areas to be signed by Contractor.  
  
Record the date the agreement is forwarded to Contractor in register (V:\FINEXEC\FINANCE\Consultancy Contracts\2006 Consultancy Contracts Listing\2006 consultancy contracts.xls)

Once Finance receives the signed Contractor's Agreement, send photocopies of the following documentation to Corporate Finance - Disbursement Manager for verification:  
  
- Contractor's Agreement  
- Letter of Agreement Schedule Information Request  
- Contractor's Checklist  
- Public Liability Insurance Policy (if any)\*  
- Professional Indemnity Insurance Policy (if any)\*  
- Appropriate WorkCover certificates (if any)\*  
  
\* Other wise, Contractor's Risk Assessment Checklist, if applicable

Enter the date these documents were sent to Corporate Finance on the Register

Create Purchase Order in SAP in order to pay Contractor. SAP will prompt for agreement number, which is obtained from the updated contractor register : V:\FINEXEC\FINANCE\Consultancy Contracts\2006 Consultancy Contracts Listing\2006 consultancy contracts.xls

Upon approval of Purchase Order, payment to the Contractor will be made.

Process Completed

Sign Original Agreement, then return to Finance Office

Disbursements Manager will email Finance Office once vendor and Agreement has been received into SAP. This enables Faculty Finance to create Purchase Order in order to pay Contractor

The Faculty Manager will be notified via e-mail by SAP that the Contractor's Agreement is now ready to be approved, printed and signed then forwarded to Finance.