

# UCLA INDEPENDENT CONSULTING REQUIRED DOCUMENTATION

The paperwork needed to hire an Independent contractor/consultant is located at the following website:

<https://www.purchasing.ucla.edu/purchasing/departamental-buyer/how-to-hire-independent-contractor-consultant>

- 1.) [Luskin Order form](#)
- 2.) If new vendor onboarding is needed, provide the Vendor name, phone, fax, and email.
- 3.) [Independent Contractor Pre-Hire Worksheet](#)
- 4.) [Independent Contractor/Consultant Form](#)
- 5.) [Sole Source Request Form](#) (NOTE: Sole Source is needed if total payment exceeds \$2,500 on federal funds, \$100K on non-federal funds)
- 6.) Detailed scope of work
  - a. Name and address
  - b. Description of work to be performed/provided
  - c. Period of performance (start and end date) should technically be a future period
  - d. Work Location
  - e. Daily rate for consultant
  - f. Price reasonableness that includes hourly rate & number of hours for each task/requirement
- 7.) Contractor/Consultant Budget
- 8.) Contractor/Consultant Budget Justification
- 9.) Has a signed agreement has been created between faculty and consultant?
- 10.) Resume or CV
- 11.) [Contractor must provide proof of adequate insurance](#). (Copy of Comprehensive or Commercial General Liability Insurance listing 'Regents of the University of California' as added insureds.
  - The University offers [a vendor insurance program](#) in case the consultant does not have general liability insurance.

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## CONSULTING INVOICING:

Consultants invoice after work has been completed, whether it be monthly or quarterly, depending on terms between consultant and PI.

The invoice must contain the following information:

- 1.) It must state "Invoice"
- 2.) Date of invoice, as well as dates of service requesting payment for
- 3.) Brief description of service
- 4.) Name and address of consultant.
- 5.) PO number

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Once you provide all this paperwork to our office, we will send all this information to the Purchasing Department.