

Consultant Contract Definition

The **Consultant Contract** is the mechanism that is used to classify, track, cost, and report on the consulting services that are linked to a Capital Project. Consultant Contracts are typically further classified by Consultant Contract Types to provide additional granularity for reporting purposes. The Consultant Contract is typically used during the design phase of the project lifecycle (depending upon delivery method), and for all professional services utilized on the project.

A Consultant Contract Line Item detail record that is based on a Capital Project Component is required to create and save a Consultant Contract. Consultant Contract Line Items link to Capital Project Components and contain the award amount to be applied as a committed cost to the Capital Project Component.

A Consultant Contract can be created and saved in an “OPEN” status without specifying the contractor (vendor) that is going to perform the consulting services against the Capital Project.

The Consultant Contract uses an Amendment to document changes for monetary amounts and/or date revisions.

Retainage and Subcontractor activity is not tracked on a Consultant Contract.

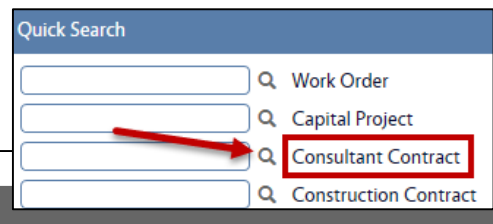
The Consultant Contract does not require a “Notice to Proceed” validation step; the “Award” step is required to enable processing Consultant Contract Invoices against the Consultant Contract or to create a Consultant Contract Amendment.

Responsibility: ADMIN ASST LRFP / ADMIN ASST UTILITIES / PROJECT MANAGER / CONTRACT SPECIALIST

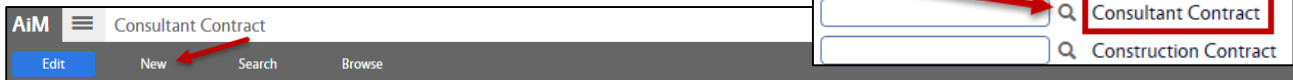
The ADMIN ASST LRFP, ADMIN ASST UTILITIES, PROJECT MANAGER, or the CONTRACT SPECIALIST will perform the following procedures in AiM for entering a Consultant Contract, depending on the Contract Type.

Create a Consultant Contract:

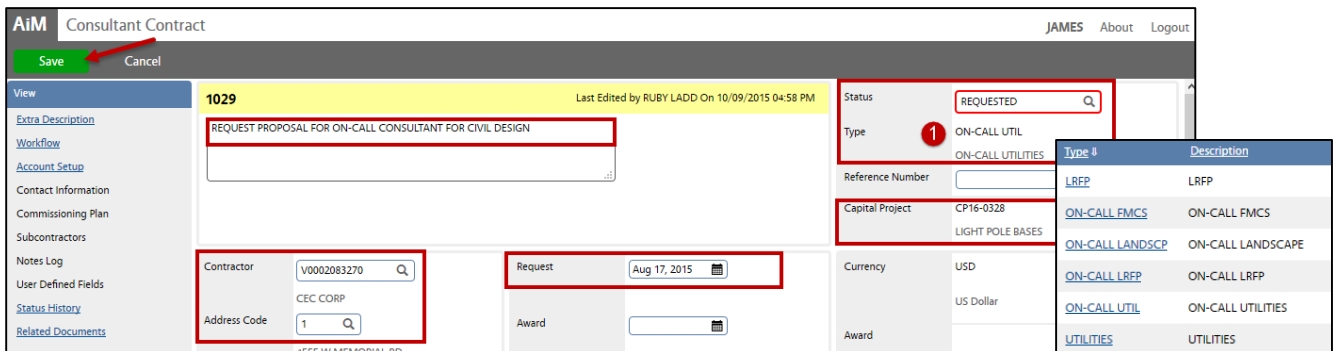
1. From Quick Search, click: **Consultant Contract**
(Contract Administration Module > Consultant/Construction Contract)



2. Click: **NEW**





3. Fill-in the following information:



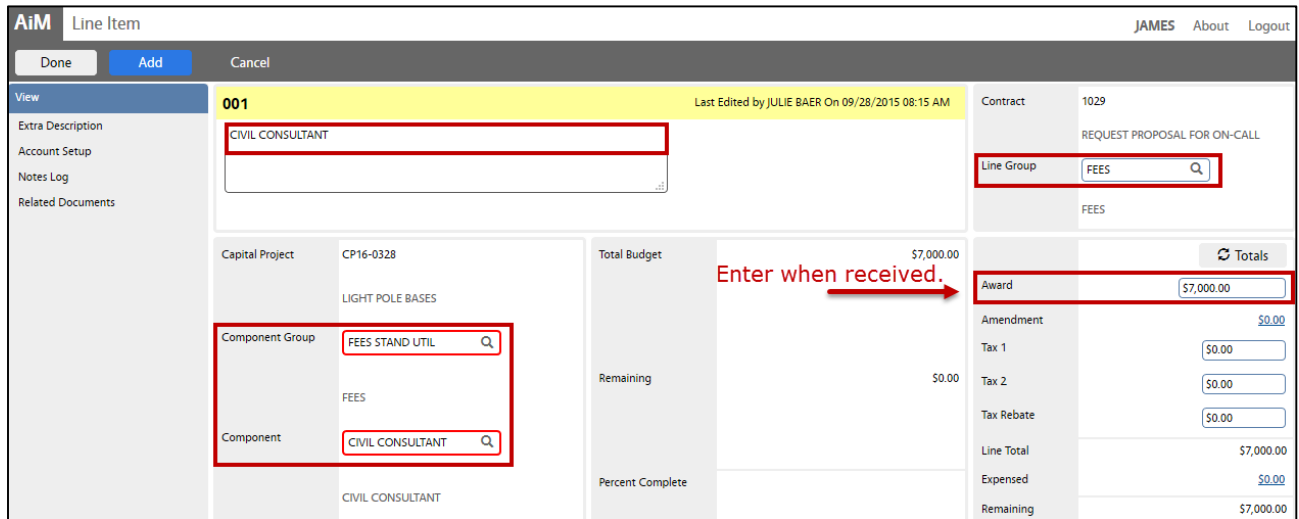
4. **Consultant Contract Number** is automatically generated by the system.



5. Select **Type**, Click: Zoom and select

6. **Consultant Contract Status Code** is automatically populated upon selection of the Type.
7. **Capital Project Number**, click:  Zoom and select
8. Enter the Consultant Contract Title in the **Description** field.
9. **Contractor Number (Vendor Number)**, click:  Zoom and select Number and Address Code
10. Complete the following dates when appropriate:
 - a. **Request Date** Date the Consultant contract was requested to be entered.
 - b. **Award Date** Date that the Consultant Contract was Awarded (*approved*)
 - c. **Review Date** Date that the Consultant Contract was reviewed (*optionally used*)
 - d. **Start Date** Date that the work is authorized to begin. (*Not before Award Date*)
 - e. **End Date** Completion date of the Consultant Contract before any Amendments that have either decreased or increased the original Consultant Contract completion date



11. From Line Item, click: **ADD** and enter the following:



- a. Enter an accurate and complete **Description**
 - b. **Line Group**, click:  Zoom and select
 - c. **Component Group**, click:  Zoom and select Group and Component
 - d. Once received, enter **Award amount**
12. Click: **Done** to return the Consultant screen
 13. Review for accuracy, click: **Save**