# 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
   AiM Consultant Contract
   Consultant Contract
   Consultant Contract
   Consultant Contract
   Consultant Contract
   Consultant Contract
   Consultant Contract
  - 3. Fill-in the following information:

AiM Consultant Contract JAMES About Logout							
Save Cancel							
View	1029	Status	REQUESTED	۹	^		
Extra Description Workflow	REQUEST PROPOSAL FOR ON-CALL CONSULTANT FOR CIVIL DESIGN		Туре 🚺	ON-CALL UTIL			
Account Setup			Reference Number	ON-CALL UTILITIES		Description	
Contact Information		Capital Project	CP16-0328	ON-CALL FMCS	ON-CALL EMCS		
Subcontractors				LIGHT POLE BASES	ON-CALL LANDSCP	ON-CALL LANDSCAPE	
Notes Log	Contractor V0002083270 Q	Aug 17, 2015	Currency	USD	ON-CALL LRFP	ON-CALL LRFP	
Status History	CEC CORP			US Dollar	ON-CALL UTIL	ON-CALL UTILITIES	
Related Documents	Address Code 1 Q Award	rd	Award		UTILITIES	UTILITIES	

- 4. **Consultant Contract Number** is automatically generated by the system.
- 5. Select **Type**, Click: <sup>Q</sup> Zoom and select

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#### CA-03-CONSULTANT CONTRACT

- 6. Consultant Contract Status Code is automatically populated upon selection of the Type.
- 7. Capital Project Number, click: <sup>Q</sup> Zoom and select
- 8. Enter the Consultant Contract Title in the **Description** field.
- 9. Contractor Number (Vendor Number), click: Q 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

Line Item			Remove	Add
Line	Description	Line Group Component	Total Expensed	Remaining

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

AiM Line Item						JAMES A	About Logout
Done Add	Cancel						
View	001			Last Edited by JULIE BAER On 09/28/2015 08:15 AM	Contract	1029	
Extra Description	CIVIL CONSULTANT					REQUEST PROPOSAL FOR ON-CALL	
Notes Log					Line Group	FEES C	2
Related Documents						FEES	
	Capital Project CP16-0328 LIGHT POLE BASES	CP16-0328	Total Budget	Enter when received.			C Totals
		LIGHT POLE BASES			Award	\$7,	000.00
	Component Group	FEES STAND UTIL Q			Amendment Tax 1		<u>\$0.00</u>
	FEES Component CIVIL CONSULTANT Q	Remaining	\$0.00	Tax 2		\$0.00	
					Tax Rebate		\$0.00
					Line Total		\$7,000.00
	CIVIL CONSULTANT	Percen	Percent Complete	plete	Expensed		<u>\$0.00</u>
			Remaining		\$7,000.00		

- a. Enter an accurate and complete Description
- b. Line Group, click: <sup>Q</sup> Zoom and select
- c. Component Group, click: <sup>Q</sup> 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