

**Independent Contractor Agreement (ICA) Protocol for Program Review**  
**Updated Fall 2023**

***Before Getting Consultant to Campus (to be completed by the Chair and Reviewer)***

Get the latest copy of the **Independent Contractor Agreement** (ICA) document and **ICA Checklist** (by clicking on the hyperlink) and include:

1. Explanation of consultant's services with the required documents to include (i) the Scope of Work signed by the consultant and Dean, (ii) **ICA**, and (iii) consultant's CV.
2. The consultant completes pages 1-2 of the **ICA** and has it notarized.
3. The Dean signs the "Prepared by" section of the **ICA**.
4. The Dean, Associate Dean, or Chair provides the above documents to the Office of Strategic Planning, Assessment, and Institutional Research (SPAIR).
5. The materials are then submitted to Procurement/Purchasing for review.

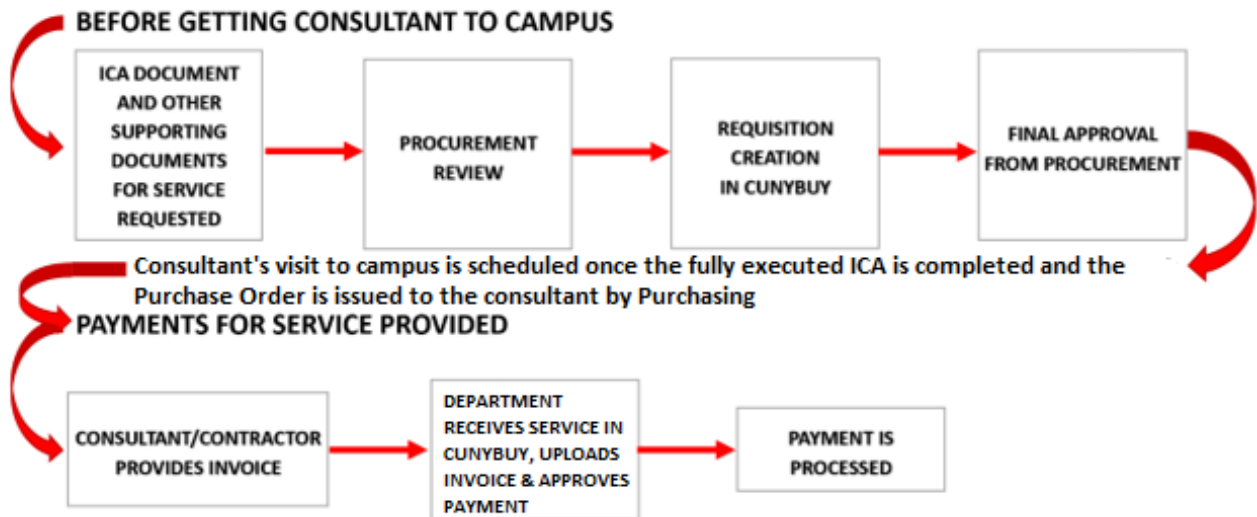
***After Procurement's Approval (to be completed by SPAIR and Procurement/Purchasing)***

1. SPAIR contacts Procurement to register the consultant in **CUNYBuy**.
2. The Office of Academic Programs and Educational Effectiveness (APEE) prepares the requisition and obtains a valid **CUNYBuy** requisition number, which is shared with SPAIR.
3. Procurement/Purchasing provides the purchase order number to the consultant and copies the Dean, Chair, APEE, and SPAIR.

**CUNYBuy Payments - Accounts Payable**

1. Once consultant/contractor services are completed, the consultant/contractor must provide an invoice to Lehman College with the proper purchase order number, including their remit to address, the amount due, and a description of the work completed (Exhibit 1 of the **ICA**). Exhibit 1 is submitted with the invoice.
2. The Dean signs Exhibit 1 verifying that the requested payment is correct.
3. APEE receives service in **CUNYBuy** to generate receipts and uploads the original invoice from the vendor.
4. Accounts Payable processes payment.

## ICA Checklist



### Summary for the informational purposes

#### ***Before Getting Consultant to Campus:***

1. The latest blank [ICA](#) document is requested from Procurement/Purchasing and is provided to Dean and/or Chair requesting a consultant to campus.
2. Dean and/or Chair provides [ICA](#) to consultant/contractor to be filled out and notarized and requests to provide resume and/or biography.
3. Dean and/or Chair must provide the consultant's signed scope of work document.
4. Consultant/contractor returns the [ICA](#) form accurately filled out and notarized.
5. All documents from 3 and 4 are submitted to SPAIR for review and approval.
6. SPAIR director submits documents to Procurement/Purchasing for review.
7. Once documents are approved by Procurement/Purchasing, "Prepared by" for is signed by Procurement/Purchasing, the consultant/contractor is entered into the [CUNYBuy](#) system, and a requisition is created by APEE.
8. All original documents are submitted to Procurement/Purchasing for final approval.

#### ***After Service Is Rendered:***

1. The consultant provides an invoice to the Dean or Associate Dean in the absence of the Chair, to Lehman College and other receipts.  
*Note: The invoice must include the remit address, the amount due, and a description of work completed.*
2. Dean and/or Chair provides invoice and receipts to SPAIR.
3. APEE generates [CUNYBuy](#) receipts and uploads the original invoice from the vendor.
4. Accounts Payable processes payment.
5. Accounts Payable notifies SPAIR by email once the payment has been processed or when issues arise so that those issues can be addressed.