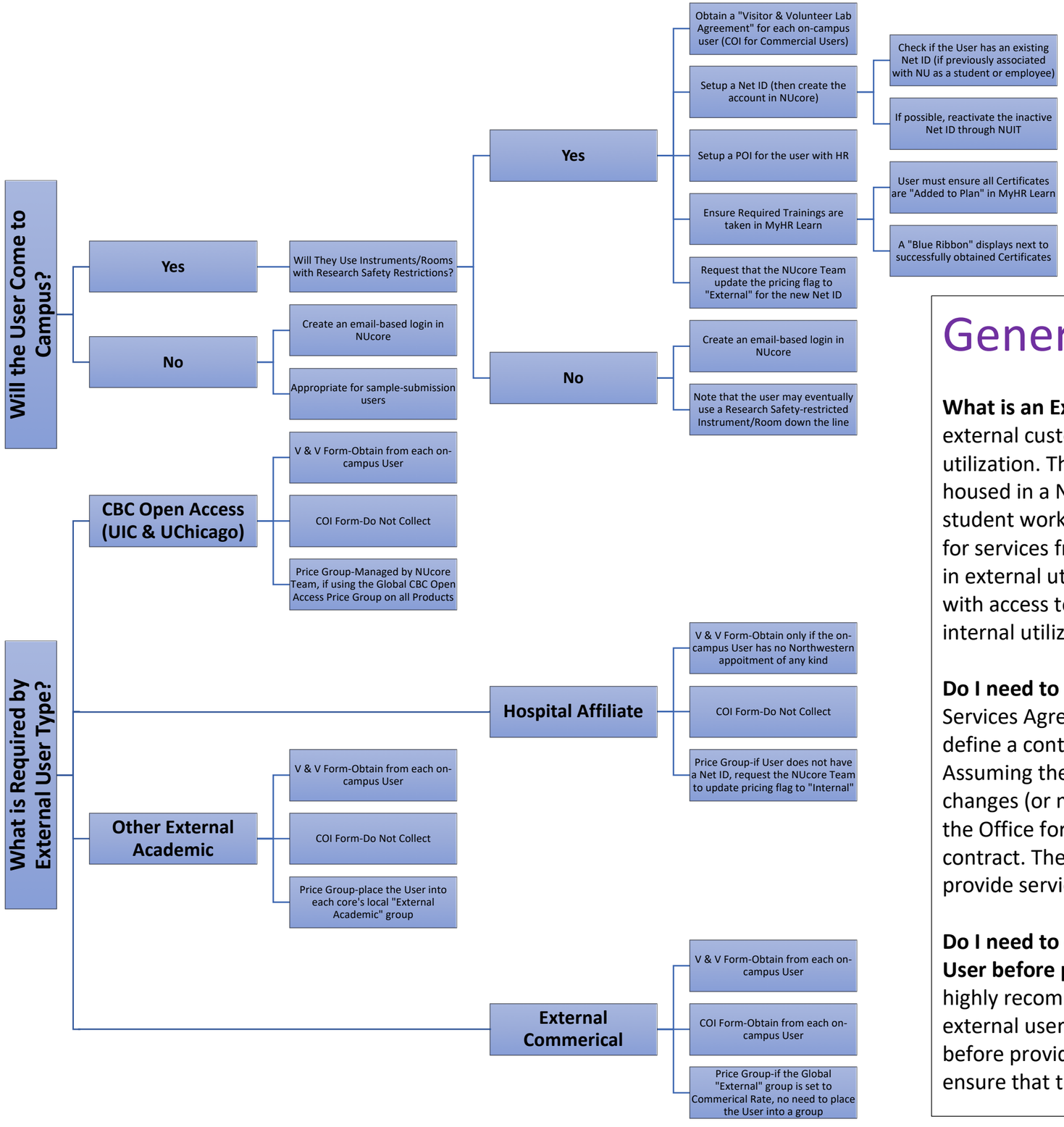
Northwestern University External Customer Workflow



General External FAQ:

What is an External Customer? Rather than defining an external customer, it is much easier to define external utilization. This occurs when a user pays with funds not housed in a Northwestern chart string. So, a graduate student working part-time for a faculty startup who pays for services from the startup's external money is engaged in external utilization. An employee of a hospital affiliate with access to a Northwestern chart string is engaged in internal utilization when paying with the chart string.

Do I need to use the "Lab Services Agreement"? The Lab Services Agreement is available to any core that seeks to define a contractual relationship with an external client. Assuming the client completes the Agreement with no changes (or minor changes to the liability terms, etc.), the Office for Research can fast-track approval of the contract. The Lab Services Agreement is not required to provide services to external users.

Do I need to obtain a Purchase Order from the External User before providing services? As a best practice, CFA highly recommends that any core providing services to external users obtain a PO from the external client before providing services. Obtaining a PO first helps to ensure that the core receives payment upon completion.