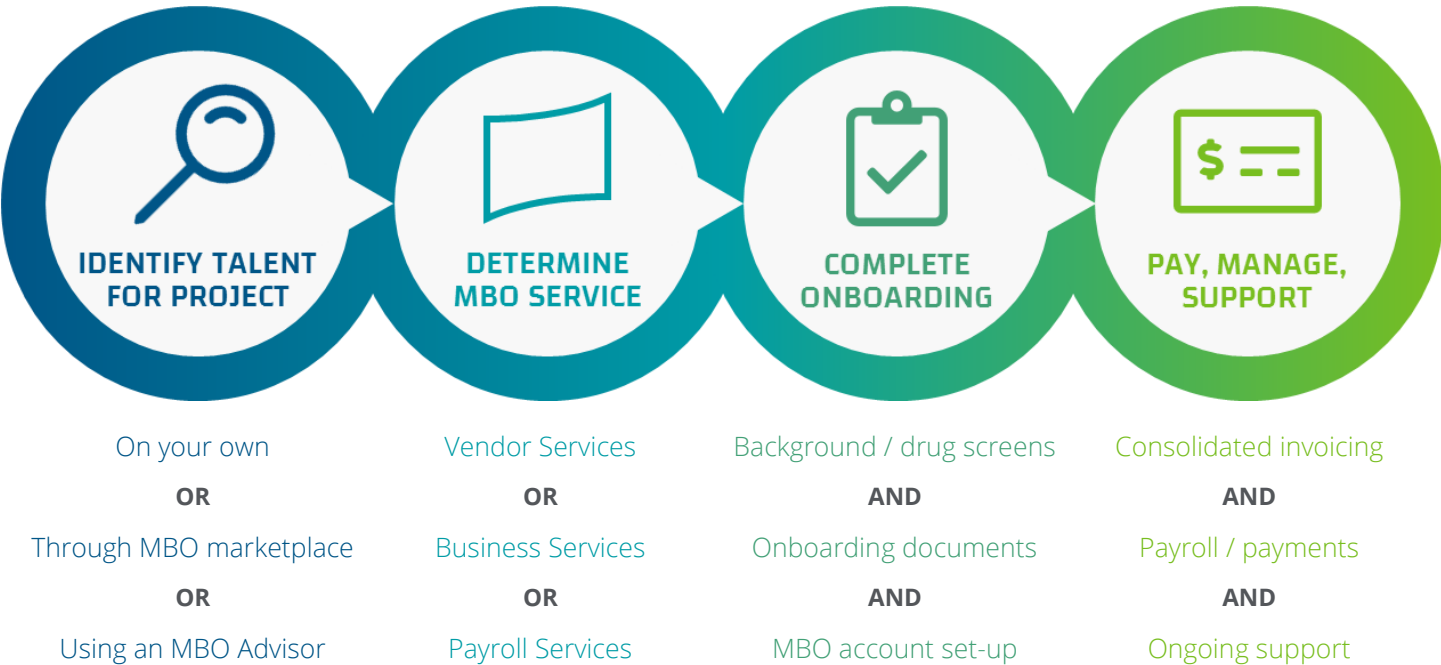


MBO Partners / Booz Allen Hamilton (Indirect Population) Engagement Lifecycle Process Summary

MBO Partners, through our comprehensive independent workforce solution—MBO Access—supports Booz Allen Hamilton throughout an independent’s entire engagement lifecycle. This document explains the processes behind the four key areas of MBO Access: finding the right workers, determining the best way for them to engage, helping them complete their onboarding requirements, and handling all ongoing financial administration and support.



DAY 1	DAY 1 - 2	DAY 2 - 10	ONGOING
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** Timing expectations above are approximate and may vary due to the worker’s responsiveness to MBO’s onboarding instructions and the selected engagement service.*

For example, workers who engage though Payroll Services often complete onboarding within one day of service determination, while the Business Services process may take up to 10 days due to business establishment requirements. Background / drug screenings and Booz Allen-specific onboarding requirements also factor into overall onboarding timing.

The sections that follow provide step-by-step explanations of each area of the engagement cycle.

For easy access to key program information and instructions, please visit [MBO’s Program Reference Guide for Booz Allen](#)



COMPLETED BY
**BOOZ ALLEN
MANAGERS**

TALENT SOURCING AND REFERRAL

► **Note:** MBO provides our engagement services for talent whom Booz Allen managers identify internally and refer to us.

1. Source the right independent talent for your project directly (i.e., outside of the Booz Allen staffing network/process). Examples of how to direct source talent include:
 - On your own, using talent you know and trust.
 - Using the MBO marketplace, through which clients create an easy-access community of proven independent talent.
 - Using MBO's Advisory Services, which provide a full-service independent workforce sourcing solution.
2. When you've identified a new independent for a project, complete this [New Contractor Referral Form](#). MBO will coordinate all onboarding activities with the independent and let you know when the work can begin.

The day you refer the talent to MBO is considered **Day 1** of the engagement process summarized in the sections that follow.



COMPLETED BY
MBO

MBO ENGAGEMENT SERVICE DETERMINATION

► **Note:** Because no two independent workers are alike, MBO offers three services—**Vendor Services**, **Business Services**, and **Payroll Services**—to ensure an engagement experience ideally suited to each workers' unique characteristics.

1. MBO directs the talent to complete our proprietary online Engagement Questionnaire.
Timing: Day 1
2. MBO reviews the questionnaire responses and, if necessary, conducts a personal consultation with the talent to fill in gaps or clarify ambiguities.
Timing: Typically Day 1 or 2 (subject to the talent's responsiveness)
3. Based on the above, MBO determines the engagement service that best fits the talent's experience, preferences, business structure, and vendor qualification status.
Timing: Typically Day 1 or 2 (subject to the talent's responsiveness)



COMPLETED BY
**THE TALENT
YOU REFER**

ONBOARDING

► **Note:** MBO monitors each referral's progress in completing the onboarding steps and provides regular reminders to avoid delays.

1. MBO provides the talent a detailed list of onboarding steps that include Booz Allen-specific tasks (immediately below). Candidates for Business Services or Vendor Services also complete qualification or business-related tasks (further below). In most cases, talent can complete both sets of tasks concurrently.
Timing: Immediately upon service determination
2. The talent undergoes a Booz Allen-required background check.
Timing: Typically launched on Day 2 or 3 with results four to five days later
3. The talent completes appropriate Booz Allen-required onboarding documents.
Timing: Typically Day 2 or 3
4. The talent completes a Federal I-9 form (W-2 engagements only).
Timing: Typically Day 2 or 3
5. The talent creates an account in the MBO system and signs the appropriate agreement with MBO.
Timing: Typically Day 2 or 3

Business-related tasks: Vendor Services

1. MBO instructs vendor candidates to send us business documentation (Articles of Incorporation, Form W-9, proof of other clients, marketing examples, etc.).
Timing: Typically begins on Day 2 and often takes two to four days; can occur concurrently with remaining onboarding steps
2. MBO evaluates the talent's business for vendor qualification, including business documentation review, insurance confirmation, and ensuring adherence to qualification criteria. Non-qualified talent engages through Business Services or Payroll Services.
Timing: Within one business day of receiving the business documentation

Business-related tasks: Business Services

1. If the talent already has a company, MBO requests and reviews supporting documentation (Articles of Incorporation, Form W-9, proof of other clients, marketing examples, etc.). Non-qualified talent engages through Payroll Services.
Timing: Typically begins on Day 2 or 3 and often takes two to four days; can occur concurrently with remaining onboarding steps
2. If the talent does not have a company, MBO assists with establishing a new compliant business. This may include filing the business with state agencies, securing a Federal EIN number, and more.
Timing: Typically begins on Day 2 or 3; business creation can take up to two weeks; can happen concurrently with remaining onboarding steps



COMPLETED BY
MBO

ONGOING PAYMENTS, MANAGEMENT, AND SUPPORT

1. MBO confirms completion of all onboarding activities and notifies you that the MBO onboarding process is complete. (Note: Booz Allen may require the completion of additional non-MBO-related tasks before the project may begin.)
Timing: Within one business day of completion of the steps above
2. MBO provides the talent with detailed instructions for submitting hours, milestones, deliverables, and/or expenses.
Timing: Concurrent with step 1 above
3. MBO consolidates and sends Booz Allen an invoice for approved time and expense submissions.
Timing: Each Wednesday
4. As they work, MBO provides talent their labor payments and reimburses Booz Allen-billable expenses.
Timing: Payment timing varies by engagement service. See the grid below.
5. For talent engaged through Vendor Services or Business Services, MBO monitors each business's adherence to appropriate eligibility requirements.
Timing: Ongoing throughout the entire engagement
6. MBO's experienced support professionals are standing by to answer talent's questions, resolve issues, notify talent of program changes or upcoming events, and provide guidance related to getting the most from their independent practices.
Timing: Ongoing throughout the entire engagement

PAYMENT TIMING EXPECTATION

Vendor Services or Business Services	After invoicing (step 3 above), Booz Allen pays MBO based on Net 15 terms. Once MBO receives this payment, we pay talent in the next weekly payroll cycle. As such, talent in these services receive their payments four weeks after a given work week. See the Booz Allen Payment Calendar for details.
Payroll Services	MBO pays talent engaged through Payroll Services on Fridays, two weeks after a given work week (or one week if required by state law).