

## Policies and Procedures for Hourly Consulting Clients

Please save this document. It has detailed information about payment, how to contact us, set up and access appointments, and any other information we need to send to you. We use a number of great technologies to help us give you an excellent consulting experience. And since statistics, and its software, can be frustrating enough, we want to ensure that working with us doesn't add to it. This document should guide you easily through the various services we use. But if you get stuck at any point, feel free to contact our consulting support at [consulting@analysisfactor.com](mailto:consulting@analysisfactor.com).

### Payment

To begin, please purchase a consultation retainer using our secure shopping cart at <http://www.theanalysisfactor.com/statistical-consulting-services/hourly-consulting-service>. Just click on "Click Here to Purchase" and it will take you directly to the order form. Check out by paying directly with your credit card or through PayPal.

- When you purchase a retainer, you are purchasing multiple hours of consulting. You can use this in a combination of consultation meetings, email questions, or time for your consultant to work out the details of your analysis. Our consultants have different hourly consulting rates, and your consultant's time will be subtracted at your consultant's rate from your retainer.
- Although meetings are generally scheduled for an hour, only the time used will be counted against your balance, rounded to the nearest 15 minutes. For example, a meeting that lasts only 20 minutes will be billed for ¼ hour.
- Occasional email questions that are very quick to answer (under 5 minutes) will not count against your balance. Longer or more frequent emails will. This is up to the discretion of your consultant. We're not in the business of nickel and diming people, but need to account for a lot of time put into a project.
- Retainers can be used for up to one year from the date of payment unless prior arrangements are made. If you find you will need to use remaining time beyond a year, we're happy to extend that. We just can't leave accounts open for years. Please let us know if you need to extend the use of your hours beyond one year.
- Retainers are only refundable if we determine that we are unable to adequately help you on your statistical problem. They are not refundable if you find you needed less time than you paid for, so please only purchase as many hours as you are sure you'll need. You can easily add on time in one-hour increments.

If your department, grant, or institution is paying for your statistical consulting and requires an invoice and/or payment by check, contact us at [consulting@analysisfactor.com](mailto:consulting@analysisfactor.com) to make arrangements. All checks must be in US dollars.

We are happy to supply a W9, invoice, and a CV for your consultant. Some institutions require additional paperwork beyond that. Please understand that we are a small organization, and that this puts quite a burden on us. Therefore, we will need to charge a \$125 administration fee for this additional paperwork.

## **Basecamp Project**

When you first purchase a retainer, we will create a secure, private Basecamp project for you. We have to create this manually, so it may take a business day to set up.

Your Basecamp project is a secure online location to share files with your consultant, sign up for appointments, and send emails that will all be stored in one central place.

If you have any colleagues working on the project who also need access to the project, just send their names and email addresses to Paige Chant, our consulting coordinator, at [consulting@analysisfactor.com](mailto:consulting@analysisfactor.com).

## **Choice of Consultants**

We have a number of statistical consultants with different statistical and statistical software expertise.

When you send in your New Client Questionnaire, we will do our best to match your statistical, software, and availability needs with one of our consultants.

If you have worked with a consultant in the past or have a preference to work with one particular consultant, please let us know. We'll do our best to meet your requests.

## **Appointments**

Appointments can be made through our online scheduling system. When you purchase a consultation and send in your New Client Questionnaire, you will be sent a link to schedule meetings with your consultant. If you are in a time zone that makes the available consulting time untenable, just let us know and we can arrange specific meeting times that work for you.

We strive to schedule all appointments within a week of request. Our busiest times of year are fall (September-November) and late winter (February-April). During these times, you may need to allow more lead-time to make appointments.

Should you need to cancel an appointment, please notify your consultant as early as possible. If you are late or do not show up for an appointment, we will wait 15 minutes and you will be billed for that time at your regular rate.

If for any reason, you show up for an appointment on Zoom and your consultant is not there, you should call our office right away. It is rare, but it has happened that the system failed to connect the two waiting parties.

## **Web Meetings**

We use Zoom.us for our web meetings. It can take a few minutes to log into Zoom, so *we suggest you arrive a few minutes early the first time*. This service is free for you to use.

When you begin using our services you will be sent a link to Zoom with specific instructions for your project.

We look forward to working with you to solve any statistical problems you're facing!

The Analysis Factor Consulting Team,

**Audrey Schnell**  
Statistical Consultant

**Jeff Meyer**  
Statistical Consultant

**Paige Chant**  
Consulting Coordinator