STANDARD OPERATING PROCEDURE (SOP) #: 110.02

Subject: Professional Services C&PS Form or Contract Procedures

Purpose and Scope: To process services contracts (other than entertainment) with a Consulting and Professional Services (C&PS) Form or a Contract.

Procedures:

Reference:
SOP 110.03 C&PS Form Instructions, & SOP 110.07 C&PS Form

Requestor:

1. reference C&PS Form and C&PS Form Instructions on the Argus Services Tab or Forms on P.S. web site
2. process a C&PS Form, a signed statement from the student, and a Vendor Registration Form for student cash winnings
3. if processing a contract to accompany the Banner Requisition, the C&PS Form is not required
4. if payment is less than $1,000,
   • process a C&PS Form
   • process a Vendor Registration Form if not registered in Banner Vendor File
   • send the C&PS Form directly to Accounts Payable, Financial Services
5. if payment is $1,000 or greater:
   • process a C&PS Form or a contract with the Contractor
   • process a Vendor Registration Form if not registered in Banner Vendor File
   • submit a Banner Requisition with details/instructions
   • send a C&PS Form or signed contract copy to Procurement with the Banner Requisition number referenced
6. when a contract is issued instead of the C&PS Form, obtain the Contractor's signature and the appropriate UWF signature authority per University Policy Memo
7. send the original signed contract to Accounts Payable, Financial Services and a copy to Procurement Services with reference to the Banner Requisition number.

Buyer:

Requisition with C&PS Form:

1. review the C&PS Form to ensure it has been filled out appropriately and the individual meets the criteria to be paid through a Purchase Order. (Reference: SOP 110.03 and SOP 110.07)
2. send the appropriate “Additional Terms and Conditions with the P.O.
   • for entertainment purchases, do not attach the Additional terms & Conditions and use SOP 110.04 Entertainment Services to process Banner Requisition.
   • for speaker or other short-term non labor-intensive service, attach SOP 110.05 Additional Contract Terms and Conditions – Speaker.
   • for services involving physical labor, attach SOP 110.01 Attachment A – Additional Terms and Conditions – Independent Contractor.
3. if the service involves equipment or a high risk activity, Reference 109.01 Certificate of Insurance Procedure
4. If total of service exceeds $20,000 threshold, service should meet one of the actions not subject to competitive solicitation process UWF.REG-6.0055, therefore the exemption form is not required. The PO will need to be identified with Clause TY000007 and the specific regulation letter that corresponds with the purchase. If total of service is less than $20,000 threshold, use applicable TY Clause (TY000001 – TY000012)
5. steps to process the requisition are:
   • Terms: Net 30 or Contract specified
   • FOB: 05 (NA)
- Ship To: 91 (NA)
- Delivery Date: beginning date of services (check contract)
- Quantity/Unit: 1 Service or Job
- Price: enter PO total - unit rates will be shown in the description.
- Type Clause: TY000007 – Exemptions IF total exceeds $20,000 threshold
- Type Clause: TY000004 (or applicable) IF total is less than $20,000 threshold
- PSC Clause # 00000350 (do not use for Entertainment reference SOP 110.04)
- Item Text: define the services to be provided, dates of service, and rate of pay
- Print the P.O.

6. send P.O. and, if applicable, Additional Terms & Conditions to the Contractor
7. do not send a copy of the Entertainment P.O. to the Contractor
8. scan all attachments and post to the applicable P.O. in Banner Reports

Requisition with Contract:

1. will not proceed without the fully executed contract from the Contractor and the appropriate UWF signature authority in accordance with SOP 105.03 and the delegations located in the SOP 105 Contracts folder.
2. review the contract for unacceptable language and indemnity clause and provide to Contracts Manager for review
3. if the indemnity clause is in the contract, discuss with Contracts Manager
4. if the dollar value of the services exceeds $75,000, discuss with Contract Manager.
5. professional services are exempt from competition in accordance with UWF/REG-6.0055 (d) Procurement Actions Not Subject to Competitive Solicitation Process.

6. send the appropriate “Additional Terms and Conditions” along with the contract and the P.O. if deemed appropriate by the Contracts Manager:
   - for entertainment purchases, do not attach the Additional Terms & Conditions
   - for speaker or other short-term non labor-intensive service, attach SOP 110.05 Additional Contract Terms and Conditions – Speaker.
   - for services involving physical labor, attach SOP 110.01 Attachment A – Additional Terms and Conditions – Independent Contractor.
7. if the service involves equipment or a high risk activity, reference 109.01 Certificate of Insurance Procedure.
8. Steps to process the requisition are:
   - Terms: Net 30 or Contract specified
   - FOB: 05 (NA)
   - Ship To: 91 (NA)
   - Delivery Date: beginning date of services (check contract)
   - Quantity/Unit: 1 Service or Job
   - Price: Enter P.O. total - unit rates will be shown in the description
   - Document Text:
     - Type Clause: TY0007 – Exemptions
     - PSC Clause #00000350 (do not use for Entertainment reference SOP 110.04)
     - Item Text: define the services to be provided, dates of service, and rate of pay
     - Print the P.O.
9. send P.O., Contract, and, if applicable, the appropriate Additional Terms & Conditions to the Contractor
10. do not send a copy of the Entertainment PO, contract, and Additional Terms & Conditions to the Contractor. (Reference SOP 110.04)
11. scan all attachments and post to the applicable P.O. in Banner Reports