

## Instructions – Fee-for-Service (International – Sole Proprietor)

Please follow the below instructions to complete the contract. Be advised that incomplete contracts will NOT be signed by UPEI signing authorities and may result in non-payment or delays in payment to the Contractor. Please forward any questions to the Contracts & Insurance Office at [contracts@upei.ca](mailto:contracts@upei.ca)

Legend: **BLUE** – insert information (*delete brackets when information inserted*)

**RED** – insert information or delete if not applicable (*delete brackets when information inserted*)

Checklist

- 1. **Date** (First Page): Date the agreement
- 2. **Legal Name of Contractor** (First Page):
  - a. **Name of Contractor:** First and Last name of contractor. Do not put their educational/professionals credentials (ie) PhD, MSc, MBA, CPA etc. (If the Contractor is a doctor you may include “Dr.”)
  - b. **Address:** please insert the City and Country the Contractor resides. It is not necessary to put their full address.
  - c. **Trade or Business Name:** If the individual operates under a trade name, please insert the business or trade name (ie) John Doe, doing business as ABC Rentals. If not applicable, please delete “*doing business as [business name]*”, from the agreement.
- 3. **Project Title** (First Page): Insert the project title
- 4. **Conditions & Warranties** (Clause 3b & 4b): Insert the Contractor’s Country of origin
- 5. **Insurance** (Clause 7): Choose ONE Clause 7, either Errors and Omissions Insurance or Commercial General Liability insurance. The following is the general difference between to two types of liability policies:
  - a. **Errors and Omissions Insurance** – coverage for financial loss for alleged negligent acts, errors or omissions arising out of the insured's *professional services*.
  - b. **Commercial General Liability Insurance** – coverage for bodily injury and property damage arising out of the insured's business operations.
- After choosing the appropriate Clause 7 – delete the red words
- 6. **Insurance** (Clause 7): Determine what insurance coverage we require for this project. Our **minimum insurance coverage is \$2,000,000**. However, if a project has significant risk, higher insurance coverage may be required.
  - a. If you are unsure of the level of insurance required for your particular project or think it may carry additional risk, please contact the Contracts & Insurance Office at [contracts@upei.ca](mailto:contracts@upei.ca)
- 7. **Term** (Clause 13):
  - a. Start date – when the services begin
  - b. End date – when the services end
- 8. **Notice** (Clause 17):
  - a. Contractor’s name
  - b. Contractor’s address
  - c. Contractor’s main contact person at UPEI
- 9. **Contractor Signature:**
  - a. **Contractor Name:** Insert the name of the individual under the signature line (ie. John Doe)
  - b. **Witness:** Someone must witness the Contractor’s signature
- 10. **UPEI Signatures:**
  - a. **Contracts of less than \$100,000:** only **ONE** signature is required - delete the additional signature line.
  - b. **Contracts greater than or equal to \$100,000:** **TWO** signatures are required – delete red words and leave the additional signature line.
  - c. **Signatures:** Only authorized individuals can sign UPEI contracts. Do not sign this contract.
- 11. **Appendix A – Services and Duties:** Insert the details as outlined in blue
- 12. **Appendix B – Fees and Payment:** Insert the details as outlined in blue

**IMPORTANT:** When you are finished filling in the required data, please **REMOVE** the **BLUE** and **RED** font by highlighting the whole document and changing the font colour to **BLACK**. The colours are to help you identify information you must fill in.