

## Instructions – Fee-for-Service (Standard – Corporation)

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 Lauren Keefe, Risk Management Officer: [lkeefe@upe.ca](mailto:lkeefe@upe.ca)

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

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

### Checklist

- 1. **Date** (First Page): Date the agreement
- 2. **Legal Name of Corporation** (First Page):
  - a. **Corporate Name:** Confirm and insert the proper legal name of the corporation  
[All corporations should have one of the following legal elements at the end of their name: *Limited, Incorporated or Corporation, or contractions of these such as Ltd., Inc. or Corp.*]
  - b. **Jurisdiction:** Confirm and insert where the corporation is incorporated. A corporation can be incorporated provincially (ie. Prince Edward Island or Ontario) or federally (Canada).
  - c. **Trade or Business Name:** (*if applicable*) If the corporation is a numbered corporation (ie. 123456 PEI Inc.) and/or operates under a trade name, please insert the business or trade name. If not applicable, please delete “*doing business as “[business name]”,*” from the agreement.
- 3. **Project Title** (First Page): Insert the project title
- 4. **Services** (Clause 1): Insert brief description of the services (detailed description to be outlined in Appendix A).
- 5. **Term** (Clause 2):
  - a. Start date – when the services begin
  - b. End date – when the services end
- 6. **Insurance** (Clause 10a): Choose ONE Clause 10a, either Errors and Omissions Insurance and Commercial General Liability insurance. The following is the general difference between 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.
  - c. After choosing the appropriate Clause 10a – delete the red words.
- 7. **Insurance** (Clause 10): determine what insurance coverage we require for this project. Our **minimum insurance coverage is \$2,000,000**, however if a project has significant risk a higher insurance coverage may be required.
- 8. **Address for Service** (Clause 13):
  - a. Contractor's corporation name and contact person
  - b. Contractor's address for service
  - c. Contractor's main contact person at UPEI
- 9. **Contractor Signature:**
  - a. **Contractor Corporation Name:** Same corporate name as in 2a above.
  - b. **Authorized Signatory for Contractor** – Individual who is an authorized signing authority for the Corporation, usually the President, Vice-President or Secretary-Treasurer of the Corporation. This individual signs on the line next to “*Per:*”
  - c. **Title:** Insert title of individual under the signature line (ie. President)
  - d. **Witness:** Someone must witness the Contractor's signature and sign on the left side of the Contractor's signature on the Witness line.
- 10. **UPEI Signatures:**
  - a. **Contracts of less than \$100,000:** only **ONE** signature is required - delete the additional signature line.
  - b. **Contracts of \$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
- 13. **Appendix C – Confidentiality Agreement:**
  - a. *Date*
  - b. **Contractor's Name:** (please follow instructions set out above in #2)
  - c. **Contractor's Signature:** (please follow instructions set out above in #9)

**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.