

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 the Contracts & Insurance Office at contracts@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. **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.
 - ☐ c. After choosing the appropriate Clause 7 – delete the red words.
- ☐ 5. **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@upe.ca
- ☐ 6. **Term** (Clause 13):
 - ☐ a. Start date – when the services begin
 - ☐ b. End date – when the services end
- ☐ 7. **Notice** (Clause 17):
 - ☐ a. Contractor’s corporation name and contact name
 - ☐ b. Contractor’s address for service
 - ☐ c. Contractor’s main contact person at UPEI
- ☐ 8. **Contractor Signature:**
 - ☐ a. *Contractor Corporation Name*
 - ☐ 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.
 - ☐ c. *Title:* Insert the title of the individual under the signature line (ie. President)
 - ☐ d. *Witness:* Someone must witness the Contractor’s signature
- ☐ 9. **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.
- ☐ 10. **Appendix A – Services and Duties:** Insert the details as outlined in blue
- ☐ 11. **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.