

Instructions – Fee-for-Service (Standard – 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 Lauren Keefe, Risk Management Officer: lkeefe@upe.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. (However if the Contractor is a doctor you may include “Dr.”)
 - b. **Address:** please insert the City and Province the Contractor resides. It is not necessary to put their full address.
 - c. **Trade or Business Name:** (*if applicable*) 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. **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 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 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.
 - a. If you are ensure the level of insurance required for your particular project or think it may carry additional risk please contact: Lauren Keefe, Risk Management Officer: lkeefe@upe.ca
- 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. **Name:** Insert the name of the individual under the signature line (ie. John Doe)
 - b. **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.