

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 the Contracts & Insurance Office at 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 Province 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. **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
- ☐ 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@upei.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 name
 - ☐ b. Contractor’s address
 - ☐ c. Contractor’s main contact person at UPEI
- ☐ 8. **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
- ☐ 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.