

**University of Oregon**  
**PSC Long Form Instructions**

**Note:** The contract number is automatically assigned when the PDF file is opened. When the contract is revised or saved, the contract number may change.

1. **UO Invoice Voucher: Required.** Attach a completed UO Invoice Voucher to every PSC sent to purchasing for contract approval. This form operates as a payment request and provides accounting data. Index and account code information must be completed prior to contract officer signature. The most frequently used account code is 24599 "Other Professional Services." You must use 24595 for "Non Resident Alien Professional Services." Other tax reportable account codes are available such as 24505 "Performance Fees" (musicians.) See [http://www1.ous.edu/owfp/plsql/fpm.result\\_section?p\\_fs\\_key=02.11E](http://www1.ous.edu/owfp/plsql/fpm.result_section?p_fs_key=02.11E) for additional account codes.
2. **Contractor Name** is the contractor's complete, legal name as recognized by the Social Security Administration and corresponding to their listed Social Security Number or Tax ID. No abbreviations. If the contractor would like to provide their "doing business as" (D.B.A.) name, they may but the check will be made out to them personally. If the contractor's full name will not fit in the space provided, write in any additional portion.
3. **Institution's representative** is a department individual directly involved in the project work. Provide their phone number and the full name of the Department. No abbreviations, please.
4. **Effective and Expiration Dates** are the dates services will begin and end. If the effective date field is left blank, date of last signature is the effective date. The contract expiration (end) date must be entered and may not be left blank. A contract does not exist until all signatures are secured. Please instruct the contractor that services may not begin until this happens.
5. **Attachments added by the department or contractor** must be uniquely labeled and referenced in the contract.
6. **Attachment A - Statement of Work:** Required. Provide a complete description of the agreed upon services that will be rendered including specific work elements, tasks, and deliverables.
7. **Attachment B - Compensation.** Required. Includes fees, travel expenses if applicable, and payment information. Please refer to <http://baowww.uoregon.edu/Travel/independentcontractor.htm>. If there is an interim payment schedule, enter it in the section marked "Payments".
8. **Attachment C - Standard Contract Provisions:** Required. Departments shall not adjust this attachment (terms and conditions.) Vendor contracts, terms and conditions, or adjustments made to our terms and conditions must be reviewed, approved and signed by a Contract Officer. Department personnel should not sign a contractor's contract or terms and conditions.

9. **Attachment D - Insurance Exhibit:** Required to mark “yes or no”. The attachment is required if insurance is required. The department must assess the risk potential of each contract regardless of dollar amount, the need for insurance, and appropriate level of coverage. \$1million is the most common policy amount when insurance is required. Departments requiring risk assessment assistance for a PSC should contact Purchasing and Contracting Services.
10. **Attachment E - Independent Contractor Certification:** Required for individuals, sole proprietors, a partnership, or other business entity such as an LLC. The contractor must sign Section A to certify that they met the outlined requirements. If the contractor is unable to meet these requirements, contact the Purchasing Services Manager at 6-1255 or the Assistant Manager 6-1255. The department head/director must complete Section B.
11. **Attachment F - Travel Reimbursement Rates:** Required if reimbursing the contractor for travel expenses or directly providing for expenses by paying a third party i.e. hotel.
12. **Other-**Mark this box if another attachment is needed and will be used. Provide a unique title. Type the title on the attached document itself, as well. If using a *photographer*, use this box and one of the photography attachments, which are pre-labeled.
13. **Prior to Contractor signature, ORSA (Office of Research Services and Administration) must review and approve PSCs supported in whole or in part by sponsored projects (grants or contracts).** The department is responsible for securing ORSA’s approval including ORSA’s initials and date in the space provided on the front of the PSC.

For PSCs supported in whole or in part by sponsored projects (grants or contracts) **always** complete the following steps:

Please select the “Other” box in the Attachment List on the front of the PSC and type “Attachment J-Sponsor Provisions” in the space. Send the PSC to ORSA. ORSA will attach the appropriate sponsor provisions, initial, and return the PSC to the department.

**To avoid processing delays:** The Contractor must see all terms and conditions prior to signing the PSC. Therefore, ORSA must first attach the standard sponsor provisions and any special sponsor terms and conditions **prior** to the Contractor review and signature. The PSC will have to be sent back to the Contractor to initial the additional terms and conditions, if the Contractor signs before the PSC has been reviewed and revised by ORSA.

14. **Contractor Data.** Should be filled in by the Contractor, entering a Tax ID number if contractor is a corporate entity or social security number if an individual. The Contractor checks the appropriate boxes for business designation and citizenship. Resident Aliens do not need to submit documentation of their status. For Non-Resident Aliens, refer to <http://baowww.uoregon.edu/Travel/paymentprocessintvisitors.htm> for required documents. Contractor signs, dates, and enters their complete mailing address used for IRS

tax reporting. 1099 Miscellaneous Income statements will be mailed to this address at tax year-end. An email address is desired if available.

15. **Dean/Department Head** signature and date obtained by the Department *prior* to sending the contract to the contractor.
16. **Contract Officer signature** must be obtained *prior* to the start of services. Send the complete PSC to Purchasing and Contracting Services to obtain Contract Officer signature.
17. **DOJ approval** is required for any contract with a public agency in another state or country, or any time the PSC exceeds \$75,000. If DOJ approval is required, services may *not* be performed until this is obtained. If solicitation is required, the solicitation documents must be reviewed and approved by the DOJ *before* the solicitation is released.
18. **Other agency approval**, signature and dates may be required, if the department wishes to contract with an attorney for legal services or auditor. Please immediately contact Purchasing and Contract Services *before* proceeding.
19. **Maximum not to exceed \$** is the maximum dollar amount that may be paid to the contractor *including* all financial considerations such as travel, per diem, etc. *Expenses paid to third party vendors on behalf of the contractor are also included.*
20. **Data, Selection, & Justification Form** – Required for each PSC. Must be included for Contract Officer review, but is *not* sent to the contractor. Documents the need for contractor services and how selection was made.
21. **Office of Minority, Women & Emerging Small Business** – Required by law if PSC exceeds \$5,000. Complete and fax per instructions at the time of solicitation *and upon award*. New statutory changes require the latter. A copy of the faxed document must be included for Contract Officer review, but is *not* sent to the contractor.
22. **PSCs for graphic designers** must be approved by University’s Creative Publications office *prior* to routing to Purchasing for Contracts Officer approval. Please include documentation of that approval. Examples: PSC initialed by Creative Publications staff, or email approval.

### **Routing the PSC or Payment to Business Affairs Office**

23. **Contracts Officer signature.** Route the PSC with attachments to Purchasing Services for review and approval, *after* both the contractor and department head signatures have been obtained. In some situations *additional signatures* and review are required such as:
  - a. Services are paid with grant funds exceeding \$5,000~Office of Research Services and Administration (ORSA).
  - b. Contracts with a public agency in another state or country~Department of Justice (DOJ). This is required regardless of the dollar value. Contact Purchasing Services.
  - c. The “life value” of the PSC exceeds \$75,000~DOJ. Purchasing Services will facilitate securing the additional approvals needed. Obtaining DOJ review and approval can take time and may affect time sensitive schedules, early is best.

Review of solicitation documents is required prior to advertisement or solicitation. Contracts must also be reviewed prior to the start of service.

24. **Payment.** PSC payments are reviewed, approved and entered into FIS by the Business Affairs Office. Departments are responsible for:

- a. Ensuring total payments do not exceed the maximum allowed contract amount.
- b. Ensuring the contractual services is complete and satisfactory prior to requesting payment.
- c. Timely submission of the necessary documents for BAO review, approval and payment.

**What you need to send to BAO:**

- a) If only one payment will be made after the completion of services: Complete the invoice voucher. Fill in the amount to be paid, account code, index, and secure department approval and signature. Submit it with the original contract and all attachments to Purchasing and Contracting Services.
- b) If multiple payments will be made: Submit a photocopy of the front page of the contract and Attachments A (Statement of Work) and B (Compensation), along with a completed Disbursement Request Form indicating the payment amount and copy of the vendor invoice to Purchasing Services.

For the final payment: Submit the original contract and all attachments to Purchasing Services, completing the invoice voucher and indicating the final payment amount. Departments are responsible for ensuring total payments do not exceed maximum contract amount.

- c) Pre-payment: Contact Purchasing Services if a deposit or pre-payment is necessary.