

Interim Policy for Services not needing Standard Services Agreement

This interim policy provides guidelines for a simpler form and/or process for paperwork related to speakers or others whose work for, or engagement with, the University is incidental in nature and very low in cost.

The Standard Services Agreement, and the subsequent Short Form Agreement, are intended to ensure that the University and its employees are protected in the areas of liability, damages, disputes that might arise, etc.

For instances where the contractor's services are limited in scope and cost, the requirement for either the long or short form contract will be waived. However, both the Independent Contractor Checklist and the Vendor Information Form or W8-BEN must be completed – the former for each engagement or series of engagements, and the second only once to get the person into the system for payment.

All of the following conditions should be met if no contract is to be signed:

1. The services should be for a single event or single series of events, not any kind of ongoing relationship with the University.
 - Examples include, but are not limited to speakers, models, coaches or judges for academic programs, and other similar roles.

AND

2. The cost of the services should be minimal – no more than \$1,000 for a single appearance or an aggregate of less than \$5,000 during a fiscal year if multiple events/tasks are anticipated with the same vendor/speaker.

AND

3. There is little likelihood that any of the issues for which the University will not have legal protection (liability in the case of injury, malfeasance or malpractice on the part of the individual, dispute over the ownership of materials, confidentiality, use of University name and logo, etc.) will become an issue as part of the engagement.

Each department engaging a vendor should use discretion in choosing not to execute a short form contract with a vendor, particularly with respect to whether there are risks to the University as noted in 3) above. If you have questions or are unsure whether proceeding without contract terms is advisable, please discuss with your school or department's Business Manager or your supervisor.

Occasionally, a contractor does not have their own invoice form. In that instance, the attached invoice may be used. Note that this invoice form may not replace the "Lost/Missing Receipt Affidavit" form used in the Procard reconciliation process.

INVOICE FORM

This invoice form may only be used:

- If the vendor does not have their own invoice form.
- For services not requiring a Standard Services Agreement:
 - o not an ongoing relationship with the University, and
 - o not more than \$1,000 for a single event or an aggregate of less than \$5,000 for a series of events in a fiscal year, and
 - o little likelihood of risk to the University.

It is not a replacement for a "Lost/Missing Receipt Affidavit" form.

Vendor Name: _____

Vendor DBA: _____

Vendor Address: _____

Vendor Phone: _____

Vendor Email: _____

DATE: _____

INVOICE #: _____

INVOICE _____ **OF** _____

BILL University of the Pacific

TO: University Contact: _____

Department: _____

Phone: _____

Email: _____@pacific.edu

QTY	DESCRIPTION (FOR SERVICES, MUST INCLUDE TIME, DATE, AND LOCATION OF SERVICES PROVIDED)	UNIT PRICE	LINE TOTAL
		SUBTOTAL	
		SALES TAX	
		LESS DEPOSIT RECEIVED	
		TOTAL	