Contract Templates – Procedures

The agreement templates outlined below should be used when a written agreement with the vendor, outlining specific details about the goods/services being purchased is in the best interest of the University and the services being provided by the vendor are valued at less than $75,000. These agreements must be completed by the University department requesting the purchase and executed by both parties prior to the provision of the goods/services per the instructions outlined below.

In instances where vendors have their own contract templates, it is always best to try and use one of the forms below instead. However, if vendors insist upon using their contract form then none of the forms outlined below would be used, instead the contract review process, as outlined on the Purchasing Services website under Purchasing Procedures, should be followed.

IMPORTANT NOTES: Any vendor that will be entering into an Agreement with FIU must be set up as a vendor in PantherSoft prior to the Agreement being prepared. The Agreement for Services CANNOT be used for foreign vendors, including foreign individuals or foreign companies. An Independent Contractor Agreement may be used for foreign vendors as needed. Tax Compliance must be contacted for approval of services being provided by foreign vendor prior to submission of Independent Contractor Agreement to Purchasing. For honorariums to individuals, Departments should refer to the Honorarium Procedure on the Office of the Controller website at: http://finance.fiu.edu/controller/AlfaIndex.html#H for instructions.

INSURANCE: For assistance in determining the insurance requirement for a given agreement, please visit the Environmental Health and Safety website.

Agreement for Services: One-Time Payment

The Agreement for Services template is to be used when a vendor is providing a one-time service and will be paid in full upon completion of said service. The agreement template is to be filled out in its entirety by the requesting department, including the assignment of an agreement number, which may be numbers, letters, or any combination thereof assigned by the department and all the requested accounting information on the form. Note that the Agreement for Services template has two payment options. You may choose to pay the vendor an all-inclusive fee or a fee that does not exceed your budgeted amount. If the fee not to exceed option is selected, the vendor is required to submit bills for compensation for services or expenses in detail sufficient for proper pre-and post-audit. Invoice
requirements are available on the Office of the Controller website at http://finance.fiu.edu/controller/QL_AccountsP.html.

The Agreement for Services template is available on the Purchasing Services website under Purchasing Forms. This agreement does not require a requisition or purchase order. A single payment is made to the vendor by the Payment Services Department upon vendors’ completion of services. Once the requesting department has completed the agreement template, the following steps shall be taken to process this agreement.

- Department sends agreement to vendor for signature;
- Vendor returns original signed agreement to department;
- Department’s accountable officer signs and prints his/her name and dates agreement; (By signing the agreement the accountable officer is confirming that the funds for this purchase are available and approved for use and that the information on the agreement has been verified and is correct.)
- Signed, the original Agreement for Services is submitted to Attention: Purchasing Services CSC 411.
- Purchasing Services enters Agreement information into internal Agreements for Services log, obtains Purchasing Director’s signature and returns fully executed original agreement back to the requesting department;
- Department keeps original agreement until the services have been fully rendered, at which point the department’s accountable officer signs off at the bottom of page 3 of the agreement, verifying that services are complete;
- Department submits fully executed original agreement along with an invoice (if applicable) to the Payment Services Department located at CSC 310 for payment to vendor.

Entertainment Performance Agreement: One-Time Payment

The Entertainment Performance Agreement template is to be used when a vendor is providing a one-time service and will be paid in full upon completion of said service. Specifically, this agreement template is to be used for performers/entertainers/guest speakers/lecturers. The agreement template is to be filled out in its entirety by the requesting department, including the assignment of an agreement number, which may be numbers, letters, or any combination thereof assigned by the department and all the requested accounting information on the form.

The Entertainment Performance Agreement template is available on the Purchasing Services website under Purchasing Forms. This agreement template does not require any
requisition or purchase order. A single payment is made to the vendor by the Payment Services Department upon vendors’ completion of services. (If performer requires a check be given to him/her on the date of the event, Purchasing Services is to be notified ahead of time as outlined in the steps below.) Once the requesting department has completed the agreement template, the following steps shall be taken to process this agreement.

- Department sends agreement to vendor for signature;
- Vendor returns original signed agreement to department;
- Department’s accountable officer signs and prints his/her name and dates agreement; (By signing the agreement the accountable officer is confirming that the funds for this purchase are available and approved for use and that the information on the agreement has been verified and is correct.)
- Signed, original Entertainment Performance Agreement is submitted to Attention: Purchasing Services CSC 411;
- Purchasing Services enters Agreement information into internal Agreements for Services log, obtains Purchasing Director’s signature and returns fully executed original agreement back to the requesting department;
- Department keeps original agreement until the services have been fully rendered, at which point the department’s accountable officer signs off at the bottom of page 3 of the agreement, verifying that services are complete;
- Department submits fully executed original agreement to the Payment Services Department located at CSC 310 for payment to vendor.

If the performer requires a check be given to him/her on the date of the event, the department must submit a memo with the signed agreement to Purchasing Services, requesting a check be available for pick-up prior to the date of the event. Once the Purchasing Director signs the agreement, rather than sending the original back to the department, the original will be sent along with the memo to the Payment Services Department. The check will be prepared and the requesting department will be contacted by Payment Services when it is ready for pick-up. Payment Services will give the department the signed original agreement with the check. It is the department’s responsibility to return that original agreement with the accountable officer’s signature at the bottom of page 3 verifying that the services were rendered the day following the event to the Payment Services Department for filing.

**Independent Contractor Agreement**
The Independent Contractor Agreement template is to be used when a vendor is providing services requiring multiple payments or when a purchase order is required by the vendor. The agreement template is to be filled out in its entirety by the requesting department.

When using this agreement template, the requesting department must enter a requisition into Panthersoft in order for a purchase order to be dispatched once the agreement is fully executed. Additionally, a Contract Intake Form for contracts valued under $75,000, available on the Purchasing Services website under Purchasing Forms, is required with this template because there is a purchase order involved. The Contract Intake Form must be filled out in its entirety, including the provision of a requisition number and all required signatures.

Once the requesting department has completed the agreement template, the following steps shall be taken to process this agreement.

- Department completes Contract Intake Form, to be signed by accountable officer, and submits it to Purchasing Services, CSC 411, along with the three (3) sets of the prepared agreement; (By signing the contract intake form the accountable officer is confirming that the funds for this purchase are available and approved for use and that the information on the agreement has been verified and is correct. This agreement template will not be processed without a Contract Intake Form.)
- Contracts Unit enters Agreement information into internal Contracts Tracking log and sends the three (3) copies of agreement to vendor for signature;
- Vendor returns three (3) original signed agreements to Purchasing Services;
- Contracts Unit obtains Purchasing Director’s signature and dispatches the purchase order;
- One fully executed, original agreement, contract intake form, and purchase order are kept on file in Purchasing Services, the second original agreement with purchase order is sent to the requesting department, and the third original agreement with purchase order is sent to the vendor;
- Department must receive the purchase order in Panthersoft and can then submit invoices to the Payment Services Department for payment to the vendor as outlined in the Agreement.