

Instructions for using UVM's three (3) Services Agreement Templates

The [Technology Services Agreement Template \(Technology Agreement\)](#) is a specialized services agreement to be used for technology, technology consultation, web hosting and design, software design and implementation, and hosting or processing UVM data services, *regardless of the dollar amount*.

The [Visual Media Services Agreement Template \(Visual Media Agreement\)](#) is a specialized services agreement to be used for visual media, photography, videography, artwork, and illustration services, *regardless of the dollar amount*.

The [Services Agreement Template \(Services Agreement\)](#) is used when a specialized services template does not apply and the total value of the services, including fees and expenses, will be greater than \$1,000. If the dollar value is below this threshold, the UVM Department (Department) may choose whether or not to use this Agreement.

*Note: Using the correct agreement, drafted on the most current template version, will help keep the purchasing process moving forward. Using the incorrect agreement for a visual media or technology-related service will result in the agreement being returned for re-drafting on the correct template.

Services Agreement FOOTPRINT REVIEW requirements:

- For any template with changes made to the Agreement *other than* completing the highlighted portions, *contract review in Footprints is required*: <https://www.uvm.edu/finance/contract-review>.
- For **Technology Agreements** of any dollar value, *contract review in Footprints is required*: <https://www.uvm.edu/finance/contract-review>.
- For **Services Agreements** and **Visual Media Agreements** valued at greater than \$10,000, *contract review in Footprints is required*: <https://www.uvm.edu/finance/contract-review>.
- For **Services Agreements** and **Visual Media Agreements** valued up to \$10,000, *no contract review in Footprints is required*.

Procedures for using the templates:

1. The Department completes the highlighted portions of the Agreement.
 - a. If contract review is required, the Department submits the Agreement (in Word format) through the Footprints system for review by a Purchasing Services Contract Analyst **prior to** sending to the other party for signature. The Agreement will be reviewed, revised, and returned to the Department to obtain the *other party's* signature first.

When entering **Technology Agreements**, choose "Information Technology Software, Hardware, and/or Services" from the drop-down menu for "Contract Type."

- b. If no contract review is required, the Department creates a PDF of the completed agreement and forwards the PDF to the other party (e.g., services provider, consultant, contractor, photographer, etc.) for their signature first. The Department should request that a scanned PDF of the signed Agreement be returned via email.

2. Once the Department obtains the other party's signed Agreement, the Department will attach it to a requisition* and submit it for a purchase order through PeopleSoft in advance of either party commencing work or otherwise acting in reliance upon the Agreement.
 - a. Attach all other required back-up in your requisition, such as a Single/Sole Justification Form (SSJF), Quotation Evaluation Form (QEF), or Employee vs Independent Contractor Determination form (EIC).
 - b. If there is a footprint number, it must be noted in the requisition's fillable field Contract FP#.
3. Purchasing Services will process a purchase order and obtain the authorized UVM countersignature. The standard procedure is for Purchasing Services to email the fully executed Agreement and the Purchase Order to the supplier and Department.

It is imperative the Agreement is fully executed prior to performance to avoid exposure to UVM.

* Note: For requests for services from foreign nationals or if payment is planned by PurCard, email the other party's signed Agreement to purchasing@uvm.edu. Confirm in your email that you have a completed Employee vs Independent Contractor Determination form (EIC), if one is required. Purchasing Services will obtain the authorized UVM countersignature and return email the fully signed Agreement to you. Payments to foreign nationals are processed through a [Disbursement Center Check Request form \(Excel\)](#) with all appropriate back-up sent to Tax Services.

Questions regarding templates, contract review, requisitions, or purchase orders, contact Purchasing Services at: purchasing@uvm.edu.

Questions regarding supplier files, invoices, Disbursement Center Check Requests, PurCard, or payments, contact the Disbursement Center at: disburse@uvm.edu or 802-656-4192