Business Contracts

Business contracts can take many forms. The following information is intended to help you understand the types of contracts handled by Business Contracts in the GBC Office. GBC often receives agreements that require analysis of the terms and conditions and/or scope of work to determine the agreement type.

For inquiries related to a business contract, email Business Contracts.

- Types of Agreements
- How to Request a Business Contract
- Business Contract Resources

Types of Agreements

Note: These definitions are specific to UCSF. Other institutions may categorize or name an agreement differently.

Professional Fee for Services Agreements (Pro-Fees): Clinical patient care services rendered by an academic unit or faculty within the direct context of the UCSF mission other than research. The agreement is between an outside party and the university (UC Regents), not with individual faculty members.

External Recharges: Service agreements for core lab services.

Training Affiliation Agreements (TAAs): Agreement that permits a resident, fellow or student to perform clinical work or research through a non-UCSF institution.

Memorandum of Understanding (MOU): Agreement between two or more parties that outlines the responsibility to work together in the pursuit of some goal.

Non-Disclosure Agreements (NDAs) and Confidential Disclosure Agreements (CDAs): Agreement that limits the information parties may legally disclose.

Faculty Consulting Agreement: Agreement between an outside party and individual faculty member, not with the university (UC Regents). Funds received by faculty members who provide occasional expertise or advice to outside organizations. Disposition of receipts is governed by the terms of the faculty compensation plans.

Payment received by a faculty member for serving as a site visit member, consulting to non-profit companies, medical legal work (professional legal witness) or other similar activity.

Please note: GBC may provide a courtesy review of the Faculty Consulting Agreement to
highlight some potential conflicts between the Agreement and the faculty member’s UC employment agreement. GBC reviews of Faculty Consulting Agreements are not legal or other advice, and are not intended to be conclusive. GBC recommends that faculty engage outside legal counsel to review the Agreement for terms that may affect faculty personally. GBC is not authorized to sign the agreement or negotiate the agreement on behalf of the faculty member. See the faculty consulting section of the academic affairs website for additional information.

**Material Transfer Agreements (MTA):** Agreement that allows for and outlines the transfer of covered intellectual property and human specimens either from UCSF (Outgoing MTA) or to UCSF (Incoming MTA). MTAs are generally handled by Innovation, Technology and Alliances (ITA).

**How to Request a Business Contract**

**Clinical Service Agreements (Professional Fee for Service, Medical Directorships, Clinical Management Services, etc.):** For Professional Fee for Service Agreements, requests must go through the Professional Fee for Service Agreement System (the PSA module in CACTAS). To request a CACTAS account, or if you need access to the system, contact Renee Lee in the School of Medicine.

**Training Affiliation Agreements:** All Training Agreements must be submitted by the appropriate School (Dentistry, Medicine, Nursing, Pharmacy, or Graduate Division). Requests should be submitted at least 60 days prior to the training start date.

*Students:* If you are interested in training with an agency or at a location outside of the UC system, you must first contact your respective school administration office. The school administration office will then submit the official request to the Government and Business Contracts (GBC) Office via CACTAS.

**Core Lab Service Agreements (for existing shared resource facilities that have an approved recharge center):** To set up an agreement with an external customer, the designated point of contact from the lab or department should complete the Business Contract Request Form for Established Core Labs and submit the form by sending it, as well as any necessary attachments, to orbusinesscontracts@ucsf.edu. For additional information, see the External Client Process.

**Non-Clinical Service Agreements/External Sale of Educational Activity:** To set up an external user, the designated point of contact from the lab or department should complete the Request Form for External Sale of Educational Activity. *Please note:* If there is no chart string set up for the service activity, a completed Rate Calculation Sheet must be included as Attachment 1.

For questions regarding status or general inquiries:

- The status of a business contract can be checked in the CACTAS system by searching the CACTAS agreement number or the other party’s name. CACTAS login is available via single sign-on in MyAccess, using the Chatter, CACTAS feature.
- General inquiries regarding business contract matters can be sent to ORBusinessContracts@ucsf.edu
Inquiries regarding a specific business contract should be directed to the assigned Business Contract Specialist.

Business Contract Resources

- Training Affiliation Agreements Policy: Campus Administrative Policy 100-10
- Assumption of Liability: Regents Standing Order 100.4(dd)(9)
- Insurance: UCSF Proof of Self Insurance
- HIPAA Information
  - UCSF HIPAA Implementation (Privacy Office)
  - UCOP HIPAA Policy
- Faculty Consulting Agreements


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