

**BUSINESS CONTRACT REQUEST FORM**

(to be used for F3 Non-Clinical Service Agreements where there are external clients and there is not an established recharge center)

DATE:	REQUESTED COMPLETION DATE:
<b>PART 1</b> Please fill out <b>ALL</b> of the following questions before filling out the request form.	
1. Is UCSF providing non-research services or purchasing services? <input type="radio"/> Providing <input type="radio"/> Purchasing, depending on the source of the funds, please go to <a href="#">UCSF Health</a> or <a href="#">UCSF Campus Procurement</a> .	2. Is the service provider a UCSF campus core facility, lab, or department? <input type="radio"/> Yes <input type="radio"/> No, this may be for <a href="#">UCSF Health</a> .
3. Are these non-research services provided to internal (e.g. customer within UCSF or any UC campus) or external customers? <input type="radio"/> External <input type="radio"/> Internal, please see <a href="#">here</a> for more information on Processing Interlocation (ITF) and Intercampus (IOC) Transactions. No agreement needed, but approved rates from <a href="#">Budget and Resource Management</a> (BRM) still required.	4. Are the non-research services within the scope of the faculty's employment at UCSF? <input type="radio"/> Yes <input type="radio"/> No, please contact the <a href="#">Office of Academic Affairs</a> as the work needs to be approved by the Department Chair and the Deans's Office as an independent consulting agreement.
5. Are the non-research services repeatable to multiple customers at a pre-established, per unit, uniform rate? <input type="radio"/> Yes <input type="radio"/> No, this may be a research agreement or "other sponsored activity" please refer to the <a href="#">Responsibility Matrix</a> and contact the applicable Office of Sponsored Research (OSR) Triage Box.	6. Is Protected Health Information involved? <input type="radio"/> No <input type="radio"/> Yes and <b>services are clinical</b> , this is a Professional Services Agreement, and a request can be submitted through Salesforce. <a href="#">See here</a> for more information on how to submit a request. <input type="radio"/> Yes and <b>services are NOT clinical</b> , this is likely public services if it is with a governmental entity, or "other sponsored activity" for other types of entities.
7. Does the activity/agreement involve any of the following? A) Non-standardized testing , B) Sales of survey services (data collection and/or data analysis) C) Educational services provided at a sponsor's site for sponsor's personnel D) Product or services that are patient care or research, E) Use of unique facilities, including staff support or analytical services F) Sales of consulting services G) Agreements with non-University hospitals or clinics to provide medical services H) Agreements to test a company's drug or device I) Federal flow down terms <input type="radio"/> No <input type="radio"/> Yes, further discussion and Office of Sponsored Research (OSR) triage are needed. Please refer to the <a href="#">Responsibility Matrix</a> and contact the relevant Office of Sponsored Research (OSR) Triage Box, or see "Contact Information" below for more options.	8. A). Will there be any UCSF claim to intellectual property resulting from the use of services or instruments? B). Will any property, intellectual property or other assets generated by UCSF (as opposed to equipment and/or reagents available commercially) be used in the provision of services? C). Will UCSF faculty, staff (including post-docs), or students be contributing intellectually to the external client's project or data collection (i.e. providing services that require development of new ideas, methods or skills or data interpretation beyond routine)?  <input type="radio"/> No to all <input type="radio"/> Yes to any, this may be a research agreement or "other sponsored activity" depending on the type of entity: government, nonprofit, industry. Please refer to the <a href="#">Responsibility Matrix</a> and contact the applicable Office of Sponsored Research (OSR) Triage Box , or see "Contact Information" below for more options.
9. Do you have a current, established recharge rate from Budget and Resource Management? <input type="radio"/> Yes <input type="radio"/> No, do one of the following: (1) Please contact the Budget and Resource Management (BRM) office ( <a href="#">see here</a> for contact information). (2) Further discussion on sales & service procedure maybe needed (more information <a href="#">here</a> - External Sales of Education Related Activities	<b>Contact Information</b> -For nonprofits, contact Awards Triage at <a href="mailto:CGAwardteam@ucsf.edu">CGAwardteam@ucsf.edu</a> - For federal/state/county/municipalities, contact Government Triage Box at <a href="mailto:gbcinfo@ucsf.edu">gbcinfo@ucsf.edu</a> - For industry contracts, Industry Triage Box at <a href="mailto:industrycontracts@ucsf.edu">industrycontracts@ucsf.edu</a> - For more contact information please see the <a href="#">Responsibility Matrix</a>

**PART 2  
PARTIES TO THE AGREEMENT**

<b>INITIATING FACILITY/DEPARTMENT:</b>	<b>EXTERNAL CLIENT:</b>
<b>INITIATING FACILITY/DEPARTMENT: (INDICATE NAME AND TITLE)</b>	<b>OTHER PARTY'S CONTACT (INDICATE NAME AND TITLE)</b>
<b>PHONE NUMBER:</b> <b>E-MAIL ADDRESS:</b>	<b>PHONE NUMBER:</b> <b>E-MAIL ADDRESS:</b> <b>WEBSITE:</b>

**EXPLANATION, BUDGET AND JUSTIFICATION**

DESCRIBE BUSINESS SERVICES REQUESTED (SERVICES SHOULD BE ABLE TO BE OFFERED CONSISTENTLY TO MULTIPLE CUSTOMERS AT AN EQUIVALENT UNIT PRICE ). ATTACH BUDGET AND RATE CALCULATION WITH 26% F&A RATE FOR THE SERVICES.

DOES THIS WORK BENEFIT THE UNIVERSITY OR RELATE TO THE UNIVERSITY'S MISSION OF TEACHING, RESEARCH, AND PUBLIC SERVICE?  YES  NO

**AGREEMENT TERM**

**STANDARDIZED CONTRACT PERIOD (CHOOSE ONE):**

1 YEAR    5 YEARS    ONGOING

**OTHER INFORMATION**

**FURTHER PERTINENT INFORMATION (CHOOSE ONE):**

**IF EXTERNAL CLIENT HAS PROVIDED A P.O. OR OTHER CONTRACT INFORMATION, PLEASE ATTACH A COPY WITH THIS FORM.**

**APPROVALS**

**\* Both approvals below are required to process your request**

**\*The below-signed have read the policies for F-3 agreements located here <https://brm.ucsf.edu/emf/f-3-external-sales-education-related-activities> and confirm that this activity meets the definition and intended purpose.**

<b>PROGRAM DIRECTOR/INITIATING FACULTY:</b>	<b>DEPARTMENT REPRESENTATIVE (CHAIR, MSO, or designee):</b>
<b>SIGNATURE:</b> _____	<b>SIGNATURE:</b> _____
<b>PRINT NAME:</b> _____	<b>PRINT NAME:</b> _____
<b>TITLE:</b> _____	<b>TITLE:</b> _____
<b>DATE:</b> _____	<b>DATE:</b> _____