



Is UCSF providing non-research services or purchasing services?

Providing

Purchasing

Depending on the source of the funds, please go to **UCSF Health** or **UCSF Campus Procurement**.

Is the service provider a UCSF campus core facility, lab, or department?

Yes

No

This may be for **UCSF Health**.

Are these non-research services provided to internal (e.g. customer within UCSF or any UC campus) or external customers?

Internal

Please **see here** for more information on Processing Interlocation (ITF) and Intercampus (IOC) Transactions. No agreement needed, but approved rates from Budget and Resource Management (BRM) still required.

External

Are the non-research services within the scope of the faculty's employment at UCSF?

No

Please contact the **Office of Academic Affairs** as the work needs to be approved by the Department Chair and the Dean's Office as an independent consulting agreement.

Yes

Will there be any UCSF claim to intellectual property resulting from the use of services or instruments?

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?

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)?

Are the non-research services repeatable to multiple customers at a pre-established, per unit, uniform rate?

Is Protected Health Information involved?

Yes

No

Yes

Services **ARE** clinical\*  
\*patient care services

Services are **NOT** clinical\*

This is a Professional Services Agreement and a request can be submitted through Salesforce. **See here** for more information on how to submit a request.

This is likely public services if it is with a governmental entity, or "other sponsored activity" for other types of entities.

This may be a research agreement or "other sponsored activity" - please refer to the **Responsibility Matrix** and contact the applicable Office of Sponsored Research (OSR) Triage Box.

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 **Responsibility Matrix** and contact the applicable Office of Sponsored Research (OSR) Triage Box.

**CONTACT:**  
Awards Triage at [CGAwardTeam@ucsf.edu](mailto:CGAwardTeam@ucsf.edu) for nonprofits.  
Government Triage Box at [gbcinfo@ucsf.edu](mailto:gbcinfo@ucsf.edu) for federal/state/county/municipalities.  
Industry Triage Box at [Industrycontracts@ucsf.edu](mailto:Industrycontracts@ucsf.edu) for industry contracts.  
See also the **Responsibility Matrix** for more contact information.

Does the activity/agreement involve **any** of the following?  
-Non-standardized testing  
-Sales of survey services (data collection and/or data analysis)  
-Educational services provided at a sponsor's site for sponsor's personnel  
-Product or services that are patient care or research  
-Use of unique facilities, including staff support or analytical services  
-Sales of consulting services  
-Agreements with non-University hospitals or clinics to provide medical services  
-Agreements to test a company's drug or device  
-Federal flow down terms

Yes

Further discussion and Office of Sponsored Research (OSR) triage are needed. Please refer to the **Responsibility Matrix** and contact the applicable OSR Triage Box.

Do you have a current, established recharge rate from Budget and Resource Management?

No

Yes

No

Please contact the Budget and Resource Management (BRM) office (**see here** for contact information).

Or

Further discussion on sales & service procedure may be needed (more information **here** - External Sales of Education Related Activities).

Please submit a business contract request (with signature from head of core lab or designee providing services and a signature from a Chief Administrative Officer or designee overseeing financial aspect of the lab) + approved Budget and Resource Management (BRM) rates to [orbusinesscontracts@ucsf.edu](mailto:orbusinesscontracts@ucsf.edu)