

## 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 with current pre-approved rates from the Budget and Resources Management (BRM) Office. More information regarding recharges on the BRM website.

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

**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 provides only 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.

**Business Associate Agreements:** When services provided by the campus requires transfer of Protected Health Information (PHI) as defined under Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule, GBC negotiates and reviews the attendant Business Associate Agreement (BAA).

Please go to the Industry Contracts Division's website for more information regarding Confidential Disclosure Agreements (CDA), Non-Disclosure Agreements (NDAs) and Material Transfer Agreements (MTAs).

## 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 Jean Jones, Associate Director, Office of Sponsored Research.

**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](mailto: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](mailto: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)
- General Liability Insurance: UCSF Proof of Self Insurance

### **Professional Liability Insurance: Certificate of Insurance Issuing**

The University of California has partnered with Alliant Insurance Services to provide an online system to issue, view and distribute certificates of insurance the University is required to provide to evidence the University's self-insurance coverages.

To request access, please contact your local Risk Manager.

Access to the Alliant system (login required):

<https://ucinsurancecert.alliant.com/Pages/Landing.aspx>

### **Certificates issued by the University**

A Certificate of self-insurance is issued to a non-University party as required by agreement and to evidence the required types of coverages are carried and covered by a self-insurance program. Campus and medical center risk management offices are responsible for issuing certificates of self-insurance to the requesting third party. The University of California campus and medical center risk management offices have been delegated the responsibility for issuing certificates of self-insurance. Certificates must comply with the following:

- Certificates should be issued in the legal name of the contracting party.
- The type of coverage and limits should not be greater than required by the contract and should not exceed the self-insurance limits.
- The other party should not be named as an additional insured or loss payee unless it is required by the contract.
- The expiration date should be the expiration date of the contract, license, permit, etc.

When reviewing requests for renewal of certificates, all previous contracts and amendments should be reviewed to assure that the terms and conditions are still consistent with the applicable self-insurance program.

- HIPAA Information
  - UCSF HIPAA Implementation (Privacy Office)
  - UCOP HIPAA Policy
- Faculty Consulting Agreements

Questions? Contact Government & Business Contracts.

Site Map  
Our Offices  
Twitter  
Terms of Use  
Make a Gift  
Contact Us  
Webmaster

---

**Source URL:** <https://osr.ucsf.edu/business-contracts>