



## Department Guide and Checklist

### I. Submitting the Request for Services Form

- Complete all sections on the Request for Services form
- Obtain all necessary signatures on the Request for Services form
- Send "UC Vendor/Provider Requirements" document to the prospective provider
- Obtain the provider's IRS Form W-9
- Obtain the provider's scope of work, proposal, or agreement if applicable
- Send the completed and signed Request for Services form, the provider's IRS Form W-9, and the provider's scope of work, proposal, or agreement to the Contracts & Property Office (contracts@contracts.ucsb.edu – MC 2095)

### II. Finalizing the Agreement

**The Contracts & Property Office will send the completed agreement to the department contact. The department contact must:**

- Ensure that the appropriate department representatives review and approve the agreement
- Obtain a signature from the department's Director/Chair (and PI if appropriate) on the agreement's signature page
- Send the agreement to the provider for review and signature
- Send the signed agreement to the Contracts & Property Office
- The Contracts & Property Office will sign the agreement and will send a copy of the fully executed agreement to the department contact for the department's records. **Once the agreement is fully executed, work may begin under the terms of the agreement.**

### III. Obtaining Payment

- Obtain the appropriate department signature on the provider's invoice or prepare a Form-5 and obtain the appropriate department signature
- Attach a copy of the fully executed agreement to the signed invoice or the signed Form-5
- Submit all documents to Accounts Payable in Accounting Services & Controls