

**3210 GD.02 Required Documentation and Approvals for Consulting and Other Professional Services**

	Contract Amounts					
	Note References	upto \$2000	greater than \$2,000 but less than or equal to \$5,000	greater than \$5,000 but less than or equal to \$25,000	greater than \$25,000 but less than or equal to \$100,000	greater than \$100,000
<b>Documentation</b>						
Invoice or equivalent		X	X	X	X	X
W-9 Form	(1)	X	X	X	X	X
Standard Professional Services Agreement				X	X	X
Competitive Bid or Single/Sole Source Justification Form	(2)		X	X	X	X
3210 Exhibit A Employees vs Independent Contractors.		X		X	X	X
Proof of Insurance		X	X	X	X	X
Purchase Order					X	X
<b>Approvals of Agreement</b>						
Department Administrator or Authorized Designee				X	X	X
Dean, Chair or Major Department Head				X	X	X
Director of Grant & Contract Administration	(3)				X	X
Controller	(4)				X	X

**Notes:**

- (1) A W-9 form is required for individuals and noncorporate entities that have not previously rendered professional services to the University for all dollar thresholds.
- (2) See Policy 3210 for special requirements applicable to grants and contracts.
- (3) Required for agreements funded by grants and contracts.
- (4) Required for agreements funded by non-grant and contract sources.
- (5) Contract amount includes all fees and reimbursable expenses.