



FEBRUARY 2018 – CONTRACTOR PROCESS UPDATES

The policy for contracting for services has been updated with significant changes and takes effect immediately.

The most significant changes to policy [Bus 43](#) are:

- [Independent Contractor Guidelines](#) for Federal Tax Purposes & Classification Worksheet have been updated.
- A new [UC Procurement Professional's Contract Checklist](#) has been developed and new agreements will be reviewed to ensure compliance with the guidelines on that checklist. Local Procurement will complete this form in conjunction with the requesting department.
- The [Contracting for Services Guidelines](#) have been updated with additional focus on contracting out and potentially displacing staff.
- The requesting department will need to work with OP Local HR to complete the Contractor Classification form before Local Procurement can begin work with the requesting department on the agreement.

The existing process is: Requesting department submits request directly to Local Procurement to initiate procurement and contracting activity.

The new process effective immediately is:

- Requesting department will submit classification worksheet to Local Procurement through the UCOPContractor@ucop.edu mailbox. Local Procurement will log the request and forward the document to Local HR via e-mail within 1 business day of receipt.
- Local HR will contact and work with the requesting department to complete the classification worksheet and return the completed document to Local Procurement.
- Local Procurement will contact the requesting department and proceeds through completion of the procurement process inclusive of securing any other supporting documentation (AC&C, Decision memo or MPI, SOW etc...)



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