



Determination

Unit submits Determination Request form.

OCG Service Contracts reviews request (may email unit for clarification). Considerations include...

Eligibility - activity, PI, staff, student, equipment, etc.
Restrictions - export control, previous sponsored projects, conflicts of interest, etc.

OCG Service Contracts emails determination results to unit.

Rate Setting

If eligible, **OCG Service Contracts** emails determination results to Budget and Fiscal Planning (BFP).

Unit works with BFP to certify rates.

BFP emails certified rate sheet to Unit and OCG Service Contracts.

Template Generation

OCG Service Contracts develops a custom agreement template (may email unit for clarification).

This may require coordination with IP Counsel, Venture Partners, ISSS, OEC, etc. Considerations include...

- Material transfer
- Publication rights
- Rights to deliverables and results
- Licensing terms
- Use of 3rd party data

Quote Authority Delegation *(optional)*

Unit identifies individual to be delegated quote authority.

Delegate schedules quote authority training with OCG Service Contracts.

OCG Service Contracts conducts training.

OCG Service Contracts emails delegates quote authority guidance and templates.

On-Going Maintenance

Unit fulfills on-going RBSA maintenance responsibilities, including...

Invoicing, payment collection, and annual rate certification.

Coordinate with OCG for proposals (as needed) and contracts (all customers).

Submit Determination Request form for new services and equipment.

(Quote authority delegates only)
Submit quarterly quote reports to OCG.