

Non-hotel Agreements

These procedures are for contracting with a venue/supplier that is not an established [Signature Venue](#), a hotel venue, or a [University-wide contracted supplier](#). The venue/supplier may be a golf club or a restaurant, for example.

All contract requests for active suppliers should be submitted at least seven business days prior to the date of the event, contract sign-by date or required payment date, whichever comes first. This includes the requirement for a deposit to secure the venue. This timeframe is increased to 14 business days for all new or inactive suppliers.

Note, only one supplier can be paid per contract request. For example, if you are contracting with a venue and a different caterer for the same event, these contracts must be submitted as two separate contract requests.

For Non-hotel Agreements of Any Dollar Value -

- ☐ The University department contacts the venue/supplier to plan arrangements.
- ☐ The University department provides a [tax-exempt form](#) to the venue/supplier to remove sales tax from the event agreement, as applicable. Note, taxes on alcohol sales and entertainment are not covered by the University tax exempt certificate.
- ☐ If the venue/supplier requires a University signature on their contract (or any document with terms and conditions), the University department requests the UNSIGNED event agreement from the venue/supplier. The University department must review all event details, terms, and conditions in the event agreement carefully to understand the entire event agreement. The University department must review any additional terms and conditions incorporated by reference if included in the agreement (e.g. rules and regulations for facility use). Those additional terms and conditions do NOT need to be attached to the request.
- ☐ In accordance with [new FN 07 policy](#) all University units are required to use University [contracted suppliers](#), when available, to purchase goods and services.
- ☐ The University department submits a Conference & Event Contract Request through the Contracts+ module of the PantherExpress System selecting contract type "Conference & Event - Non-Hotel." All supporting documents must be attached when submitting the contract request. If the University department does not have all event agreement-related documents, **STOP**. Do not enter the contract request into Contracts+ until all applicable documentation is obtained.

The contract request shall include:

- ☐ If the supplier/venue is new or inactive in the PantherExpress System and the payment method will be through
 - OneCard – enter the "Conference & Events Only" supplier option into the Second Party field. No W-9 or SVF required. ✖
 - Check, ACH or Virtual Card - a completed [supplier verification form](#) (SVF) and W-9.
 - For OneCard payments – enter the "Conference & Events Only" supplier option into the Second Party field in the General Information Section of the Contract Request. The authorized supplier signer's name, title and email address are still required.
 - For check, ACH or Virtual Card payments:
 - In the contract request, for the question "Does the Second Party or Supplier/Provider name exist

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in the search box above?," select "no." Contracts+ will prompt the requester to attach the W-9 and /or SVF to the contract request, as necessary.

- The University department approver will approve the contract request.
- It will route to Purchase, Pay & Travel Customer Service and then Payment Processing & Compliance for supplier setup.
- Once the supplier/venue is active in the PantherExpress System, the contract request will route to the Conference & Event working queue.

- ☐ If the University of Pittsburgh name and/or logo is used in any way - the University department must obtain approval from the [Office of University Communications and Marketing](#) and attach the approval email to the contract request.
- ☐ If the event includes the University accepting credit card payments, or if your event will require the collection of payment card information - the University department must obtain approval from the [University's eBusiness Group](#) and attach the approval email to the contract request.
- ☐ If the event includes services where the University is disclosing or the venue/supplier is creating, hosting, maintaining or having access to any University data (e.g., PII, PHI, FERPA) - the University department must request a [vendor security risk assessment](#) and attach the Pitt IT Security approval email to the contract request. If you're unsure if the event or venue/supplier needs a vendor security review, please refer to this [additional information](#).
- ☐ The UNSIGNED event agreement. Purchasing Services must sign venue/supplier-provided event agreements. Do not sign at the departmental level.
- ☐ Any other documents provided by the supplier that include terms and conditions or require a signature.
- ☐ If the total event agreement amount exceeds \$15,000 - a properly completed and approved [directed or sole source justification form](#) (DSSJF). Ensure you use the most recent form available at the link above.
- ☐ An accurate certificate of liability insurance (COLI), if required, see COLI section below.

Contracts+ Procedures/Process:

- ☐ After the department submits the contract request it will route through Contracts+ to Purchasing Services. The Purchasing Services contract administrator will review all supporting documentation and request any necessary additions and/or corrections. The event agreement will then route to the Purchasing Services Conference and Events senior buyer for review.
- ☐ After the senior buyer reviews and edits, the senior buyer will post a request for acknowledgement for the department in the contract request discussion thread of Contracts+. The University department is required to review the edits and comments regarding the event agreement and respond through the discussion thread.
- ☐ Once the University department provides an approval response in the discussion thread, the event agreement will be sent for signatures. The event agreement routes to the authorized Purchasing Services signer and then to the venue/supplier for signatures.
- ☐ After signatures by both Purchasing Services and the venue/supplier, the Contracts+ record will change to a contract status of "Executed: In Effect." At that time, the required deposit or payment may be made in accordance with the guidance below.

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- ☐ The University department should follow and monitor the event agreement through the Contracts+ workflow process until it is “Executed: In Effect.” The venue/supplier may not agree to the edits. The University department will be required to review and decide whether they would like to move forward with the event agreement.

Certificate of Liability Insurance (COLI):

The University department must review the [insurance requirements](#) and ask the venue/supplier for a COLI to match those requirements.

Alcohol:

If alcohol is served at University-sponsored events, including cash bars (e.g., the University is not paying for the drinks, but alcohol is still being served in connection with the event), then the University department is required to provide the following supplemental items with their expense report if using the OneCard for payment or with the payment request through the Contract Payment Form in the PantherExpress System:

- ☐ The University department is required to obtain written exception approval in accordance with University Policy [FN 28](#).
 - See the "General" section of the Expense Reimbursement Eligibility Quick Reference Guide at the end of the policy for more information. A list of exception approvers can be found at the beginning of the policy.
 - This approval does NOT need to be submitted with the contract request.

List of Attendees:

If University employees are attending an event then the University department is required to provide the following supplemental items with their expense report if using the OneCard for payment or with the payment request through the Contract Payment Form in the PantherExpress System:

- ☐ A list of attendees, including non-University employees, is required to comply with IRS provisions, in accordance with University Policy [FN 28](#).
 - See the “Business purpose meals, meetings, and events” in Section I of the policy for more information.
 - This approval does NOT need to be submitted with the contract request.

Payments:

Each event agreement should use only one [payment method](#) for the life of the executed event agreement.

Note: Payments are not processed by Purchasing Services. [Payment methods](#) are by OneCard or through Payment Processing and Compliance. Questions on how to make payments should be directed to [PPT Customer Service](#)

- ☐ **OneCard Payment:** Once the Contracts+ record has a status as “Executed: In Effect,” provide the venue with your OneCard information and then submit an expense report using [Concur](#). Attach a copy of the fully signed venue agreement and the invoice(s) to your expense report.

Contract Payment Form: Once the Contracts+ record has a status of “Executed: In Effect,” the department requestor must create and submit a [Contract Payment Form](#) (under Specialty Forms in the PantherExpress System). The department requestor must submit the invoice(s) against the Contract Payment Form purchase order.