

General Instructions for Assignments

1. A name change (same FEIN) is not an assignment. Consult with DOP and Legal if it is unclear whether the contractor is proposing a name change, or if there is a merger/acquisition or other activity impacting the status of the legal entity as originally contracted.

2. If an assignment is necessary:

Purchasing Officer completes and issues an assignment cover letter to the vendor making the request (see "Assgn – Ltr to Vdr.doc"). Yellow highlighted areas need to be completed. There is also redline and a couple of comments that need to be considered.

- The Acceptance of Assignment document needs to be modified for the circumstances of the particular assignment. There are some comments that need to be considered.

3. The insurance information that the assignee provides must include the following:

- a. Certificate(s) of insurance
- b. Additional insured endorsement(s)
- c. Any policy page copies for cases in which the policy provides for additional insured automatically if the contract requires additional insured

4. Once all of the information required in the assignment cover letter has been received, provide the Acceptance of Assignment document to Bill for signature (see the example memo and example supporting documents list).

5. Once the Administrator has signed the Acceptance of Assignment document, prepare a cover letter to the Board of Examiners (see the example cover letter and the example list of documents to be included with the letter to the Board).

6. The Board of Examiners subcommittee meets the second Tuesday of each month, and agenda items are due the previous Thursday.

- a. The Purchasing Officer must attend this meeting to answer any questions that the subcommittee has.
- b. If the subcommittee votes to place the assignment on the Board's consent agenda, that means it's placed together with other items, and the Board will simply vote either to approve or disapprove all items on the consent agenda in a single vote.
- c. If the subcommittee votes to place the assignment on the Board's regular agenda, that means that the Board will consider the assignment separately, and may have questions.

7. In either case, the Purchasing Officer must attend the Board of Examiners meeting, which occurs on the third Tuesday of each month. If the assignment is placed on the regular agenda, the Purchasing Officer must be prepared to answer questions.

8. If the Board approves the assignment, the assignment will go into effect seven days later. A copy of the approved Request for Recognition of Assignment document must be obtained for the contract file. This can be obtained by SCO administrative staff.

9. The contract will also need to be amended to reflect the assignee as the contractor.