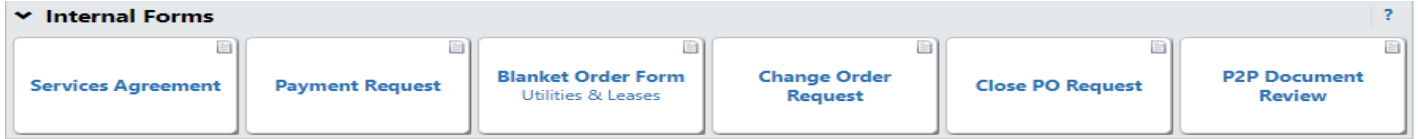




Accessing the Services Agreement Form

The Services Agreement form is found in the Internal Forms section of BobcatBUY. The Services Agreement Form is used to process purchases for services. The form allows for multiple types of services to be requisitioned using the same format. If your transaction is for Utilities & Leases please use the Blanket Order Form.



Instructions

Please review the Services Agreement instructions for general processing instructions. These instructions also provide useful links to the [Contract & Insurance Matrix](#), [Signature Authority](#), [Exhibit A for the Services Agreement Form](#), [Short Form Services Agreement Form](#), and [Supplier Information](#).

- 1. After you have read and become familiar with the instructions Click **Next**

Details – Form Name Field

- 1. In the **Form Name field** you will want to replace the Services Agreement default with a brief summary description of service. The brief summary of services should include the nature of service and any other pertinent details. This information will print on the PO for the Supplier to see. You are limited to 100 characters including spaces.

- 2. Click **Save Progress**
- 3. Click **Next**

Details form showing fields: Form Name * (Services Agreement), Purpose (Procurement Request), Template Title (Services Agreement), Form Type (Services Agreement), Currency (USD).

Suppliers

Search Registered Suppliers form with fields for Supplier, Relationship (All), and Zip Code (Within 5 Miles).

Existing Suppliers:

- 1. Click the text box to the right of **Supplier** and type in the name of the supplier.
- 2. Click **Search** in bottom left corner
- 3. Click **Select** to the right of supplier
- 4. Click **Next**

Note: The supplier’s preferred fulfillment address will be bolded and preselected. You will still be able to select from the available fulfillment addresses the correct address for your purchase.

PLA RMT 250 S H (MISC7): (preferred) ✔ Selected
250 S HIGH ST, COLUMBUS, OH 43215 US

New Suppliers:

- 1. Click the text box to the right of **Supplier** and type in the Not Available as the name of the supplier.
- 2. Click search
- 3. Click Select to right of Not Available Supplier.
- 4. Click **Next**

Note: You may use these steps to request changes to existing supplier information.

Attachments

Add Attachment

- 1. Click **Add Attachment**
- 2. Click **Upload**
- 3. Click the **text box to the right of Title and Type in the Name of the file**
- 4. Click **Browse**
- 5. Click on **File Name**
- 6. Click **Open**
- 7. Click **Save Changes**
- 8. Click **Save Changes again**
- 9. Click **Next**

Note: All documents loaded on the Attachments screen will be uploaded as an internal attachment in the draft cart. If the document needs to be sent to the supplier with the PO, e.g. Short Form Services Agreement or quote, you will need to upload the attachment again in the draft cart as an external attachment.

Form Fields

Please refer to the [Contract and Insurance Matrix](#) and Ohio University [Signature Authority](#) for the correct agreement type and the appropriate signer.

1. Select the **Services Agreement Type** that applies to your purchase from the drop down list:

Services Agreement (formerly Comprehensive IC) – is used for more complex services in which exhibits are attached to the University’s standard terms and conditions to define the scope of work the supplier will be performing for the University. You will need to attach an [Exhibit A for Services Agreement Form](#) and any supporting documentation to ensure the Purchasing team can create the contract.

- **Supplier Provided Agreement** – Although our preference is to have services covered by Ohio University (OU) contracts, we do in certain situations and industries accept the supplier’s contract. Because it is not OU’s standard terms and conditions, additional review time may be required to negotiate acceptable terms. You will need to attach the supplier’s agreement and any supporting documentation.
- **PO Terms Only** – used for simple services where the University’s standard terms and conditions will suffice as the contract. Typical uses are repairs, maintenance, or delivery services. You will need to attach documentation to support the PO amount.
- **Short Form Services Agreement (formerly IC EZ)** – used for common, specifically defined services where there is no ambiguity regarding the nature of the service. The [Short Form Services Agreement](#) should be used rather than the Honorarium Agreement when there is a need to have a formal contract that legally obligates the supplier to perform the agreement. You will need to attach the fully executed agreement including the terms and conditions pages, signed by both the supplier and the department CFAO as the requisition will bypass the Purchasing Department and create a PO. If a supplier objects to any of the standard terms and conditions on the agreement, the form must be routed to the Purchasing team for resolution. At this point the Short Form Services Agreement can no longer be used and the Services Agreement form will need to be selected in BobcatBUY for proper routing to Purchasing.

NOTE: For the Short Form Services Agreement, the amount of anticipated spend must be less than \$50,000 and be for the current fiscal year only. In addition, the Short Form Services Agreement will no longer act as the invoice. The supplier must provide an invoice with the following information: supplier name and address, invoice date, invoice number, amount invoiced, date of service and description of service.

2. Provide **Service Start Date**
3. Provide **Service End Date**
4. Provide a **Detailed Description of Services**
5. Provide **total dollars of service as the quantity. (Unit Price & Unit of Measure cannot be changed)**
6. Click **Save Progress**
7. Click **Next**

Review and Submit

1. Confirm message next to each section is marked with a Green check mark under Progress and says Required Fields Complete.
2. If a section is marked incomplete, revisit the section by clicking on the title to correct problem
3. Click **Add and go to Cart** and continue to process your draft Cart according to the standard BobcatBUY practice.

Review and Submit Form Request Actions ▾ | History | ?

✓ Required Fields Complete

Section	Progress
Suppliers	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete