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This document should only be used for services that are:

- Specifically listed under Nature of Services section of form
- Common services with no ambiguity regarding performance criteria and deliverables
- All compensation, either lump sum or in installments, must be paid within the same fiscal year
- Does not exceed the competitive bid requirements, currently \$50,000. Refer to [policy 55-007](#).

Complete the form in its entirety. Please note that this is a legal document, so professional language should be used.

Provide the legal name of the individual or business along with their address and contact information. You should verify if the supplier is in the BobcatBUY database. If the supplier is not in BobcatBUY, you should obtain the appropriate W-9/W-8 forms along with a Supplier/Payee Information Form.

Enter the date of services or a date range of services if it spans over more than a single day. Specify the location where the services will be provided.

Select the Nature of Services that best fits your request. If you are not sure if your requested service fits one of the categories, please contact Contract Services at [contracts@ohio.edu](mailto:contracts@ohio.edu). Do not add a category.

Provide detailed information regarding the compensation.

- Lump sum, price list, or pay structure
- Note if travel expenses are included
- If exact amount is not known, provide a "Not to Exceed" amount.

Supply the accounting string to ensure funds are available to pay for the services.

Provide a detailed description of services. Be specific with the expected deliverables, appearances, and performance expectations. This is the contract language. We can enforce and insist on only what you write in this form.

Fill in the contact information of the department contact that will be dealing with the supplier and receiving services.

**NOTE:** *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. The invoice should be sent to Accounts Payable at [accounts.payable@ohio.edu](mailto:accounts.payable@ohio.edu), fax: 740-593-9890 or by mail: Accounts Payable, 1 Ohio University Drive, WUSOC 213, Athens, OH 45701.*

When the form is completed, you will present the form to the supplier for signature. The supplier should always sign first. When sending the form to the supplier you must include the entire contract, which includes both the form and all pages of the terms and conditions. If sending electronically the form should always be sent in PDF format. Electronic signatures are acceptable provided they are secured signatures such as DocuSign or Adobe. If sending a paper copy, print out all copies and send to supplier.

Once you have received the signed copy from the supplier, you will get the appropriate Ohio University authorized signor to sign the agreement. Please refer to the Ohio University [Signature Authority](#). In most cases, for this form, it will be the Planning Unit CFAO. Once the form is signed by both parties, it becomes a fully executed copy. If the supplier rejects any portion of the university's terms and conditions, the document must be sent to Purchasing. 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. You will attach this fully executed copy to your BobcatBUY requisition as an external document and it will be sent electronically to the supplier upon creation of the Purchase Order.

For the services covered by the Short Form Services Agreement, the services are classified as Level 1 insurance, which means that suppliers must have specified levels of insurance but need not provide a certificate of insurance (COI).