



Services Agreement Type / Processing Changes

Prior to service:

1. Refer to the [Contract and Insurance Matrix](#) to determine the new Services Agreement Type needed i.e. Services Agreement, Short Form Services Agreement, Supplier Provided Agreement, PO Terms Only or Honorarium.
2. Refer to the [Contract and Insurance Matrix](#) to determine level of insurance i.e., 1, 2, or 3 and then refer to [Risk Management Insurance Guidelines](#) to gather proof of insurance listing Ohio University as “Additional Insured” for levels 2 & 3 only for the dollar ranges specified.
3. Refer to the [Contract and Insurance Matrix](#) to determine other documents needed based on Services Agreement Type i.e. Food License, Bureau of Workers Comp, Licensure, etc.
4. Determine if the Supplier is an Existing Supplier or New Supplier. For New Suppliers have the supplier complete the appropriate [W-8/W-9](#) and the [Supplier/Payee Information Form](#).
5. Follow the matrix below to determine who completes and signs the agreement and gather all required documents with required signatures. Refer to [Signature Authority](#).
6. Follow the [Services Agreement Quick Reference Guide](#) or [Payment Request Quick Reference Guide](#) to enter a request for payment in BobcatBUY.
7. Once purchase order is issued supplier can perform service.
8. Invoice should be sent to accounts.payable@ohio.edu after services are rendered.

Old Services Agreement Type	New Services Agreement Type	BobcatBUY Form	Payment Type/Services Agreement Type (Selection within BobcatBUY Form)	Invoice Needed	Signature Authority
Honorarium Agreement	Honorarium Agreement	Payment Request	Honorarium	No – payment will process from the attached Honorarium Agreement.	Yes - need signature from CFAO prior to submission.
Comprehensive IC	Exhibit A (completed by units)	Services Agreement	Service Agreement	Yes – invoices should be sent to accounts.payable@ohio.edu.	Yes - signature is not required on Exhibit A the contracts team will gather required signatures.
IC EZ	Short Form Services Agreement (completed by units, signed by suppliers)	Services Agreement	Short Form Services Agreement	Yes – invoices should be sent to accounts.payable@ohio.edu.	Yes - need signature from CFAO prior to submission.
PO Terms Only	PO Terms Only (No Change)	Services Agreement	PO Terms only	Yes - invoices should be sent to accounts.payable@ohio.edu.	No - purchase order approval is sufficient.
Supplier Provided Agreement	Supplier Provided Agreement (No Change)	Service Agreement	Supplier Provided Agreement	Yes - invoices should be sent to accounts.payable@ohio.edu.	Yes - signature is not required on Supplier Provided Agreement the contracts team will gather required signatures.