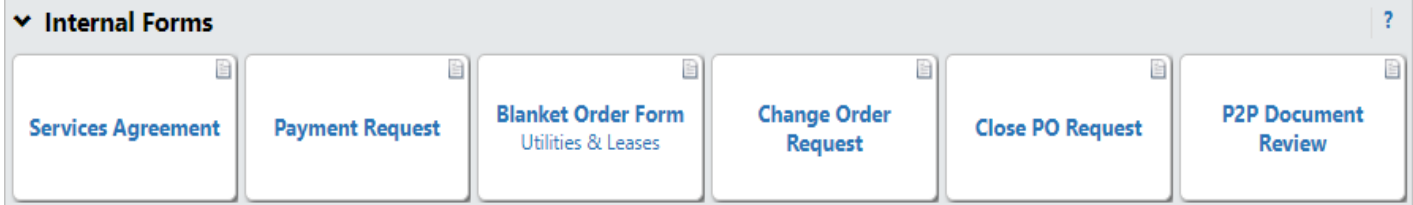




## Accessing the Services Agreement Form

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.



## Suppliers

**Search Registered Suppliers**

Supplier:

Relationship:

Zip Code:  Within

**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 the supplier.
4. Click **Next**

**New Suppliers:**

1. Click the text box to the right of **Supplier** and type in **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 must use these steps to request changes to existing supplier information.

## Attachments

1. Click Add Attachment - if adding a new supplier, upload required documentation as a separate document than the contract information.
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

## Form Fields

Please refer to the [Contract and Insurance Matrix](#) and Ohio University [Signature Authority](#) for the correct agreement type and the appropriate signer. 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 form and any supporting documentation to ensure the Purchasing team can create the contract. [Exhibit A for Services Agreement Form](#)
- **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.
- **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.
- **Short Form Services Agreement (formerly ICEZ)** – 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.

## Form Fields Continued

1. Provide **Service Start and End Dates**
2. Provide a **Detailed Description of Services**, include the pertinent details of what you want the supplier to do for you under this contract, including what services, what deliverables, when the services need to be performed, and under what specifications. This will be the foundation of what we expect the supplier to provide to the University.
3. Provide **total dollars of service as the quantity, use the unit price of \$1.00 and Unit of Measure should be EA**

## 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 the problem, click Next to save progress.
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
<a href="#">Suppliers</a>	✓ Required Fields Complete
<a href="#">Attachments</a>	✓ Required Fields Complete
<a href="#">Form Fields</a>	✓ Required Fields Complete

◀ Previous    Add to Favorites    Add and go to Cart ▶