**Short Form Services Agreement Instructions**

## *Background & Intent*

The Office of the General Counsel (OGC) has created a standard Short Form Services Agreement (*see OGC standard form* OGC-SC109) for use with low-risk transactions between the University units and their External Sales customers. Always take a copy of the latest contract version from the OGC standard contracts library; do not use a saved copy from your computer.

## *Primary Purpose*

In general, an agreement (or contract) has two primary purposes:

* Defines a mutual written understanding with the customer. The agreement includes the University's and the customer’s obligations to each other. The intent of the agreement is for both parties to have a clear understanding of their individual obligations and who to contact if changes to the agreement are needed.
* Mitigate risk to the University by clearly stating or disclaiming provisions such as warranties, termination, use of University name or logo, limitation of liability, indemnification, and export controls.

## *Guidelines on Usage of Standard Short Form Services Agreement*

* Total value of services being provided is for any dollar value
* Only for use with customers within the United States paid with US dollars
* Transactions are low risk as defined by External Sales Policy *Selling Goods and Services to External Customers*
* There are no additional terms, conditions, services, activities or modifications of the agreement
* The Short Form Services Agreement should not be used in lieu of the Standard Services Agreement (OGC-102) for managed risk services

## *How to fill out the Short Form Services Agreement*

The department making the external sale completes the gray-shaded areas of the OGC approved Short Form Services Agreement, to include:

* Department name: Enter the University Department name that matches the description of the DeptID from Chart of Accounts
* Customer : Enter the customer’s legal name (“Company”)
	+ Can be validated by the customer or on the customer’s website if available
* Customer address
* Customer phone number, fax number and email address
* Department Dept ID number
* Approved Internal/External Sales Approval Form (IESAF) number for the activity if required per University Policy
* Term Start Date & Term End Date: Enter the effective date of the service (a future date) and the expiration date of the contract
* “Description of Services”:
	+ Enter the general description of the product or service to be provided
	+ Enter any “deliverables” that are necessary to complete the work scope
* “Provide details and pricing”:
	+ Enter the price per service and the expected quantity or volume of the activity
	+ You may also refer to an attached standard rate sheet (see attached Exhibit A)
* “Check one”:
	+ Single Sale or Repeating Multiple Sale: Click on the “X” that indicates the correct box, either a one-time sale or a recurring, multiple sale
* “Price per service”:
	+ Enter the unit price
* Sales, Use or Excise Tax
	+ Per Tax Department
	+ “Total Compensation”: Total unit price × volume = grand total
* Don’t forward to the External Sales Office for review (not required)
* Forward to customer for signature
* Forward to U of M delegee for signature
* Attach the copy of the signed contract to the EFS invoice.

**T*he short form can be modified*.**

If the customer asks for any changes to the terms & conditions, you can modify using the Amendment to the Services Agreement OGC-SC112 . If you have any questions, contact the External Sales Office at (extsales@umn.edu).