



INSTRUCTION SHEET
FOR COMPLETING AN
OAKLAND UNIVERSITY AGREEMENT

Approved form Oakland University Agreements for performers, independent contractors, consultants and vendors that will provide goods or services to Oakland University, or rent or use Oakland University facilities and/or grounds, are located at <http://www.oakland.edu/legalforms>. **NOTE: the Services Agreement MAY NOT BE USED for grants or sponsored research, University financing arrangements, construction services (e.g. new construction, repairs, trenching, cranes, hi-los), hazardous waste services, or services involving the use of airplanes or helicopters. Contact the Office of Legal Affairs for assistance with these agreements.**

If you have any question whether or not a form agreement may be used for the contract you wish to enter into, contact the Office of Legal Affairs before processing the agreement.

I. BEFORE signing the agreement:

1. _____ Only individuals specifically authorized in writing by their divisional Vice President may sign the agreement.
2. _____ Follow all Administrative Policies applicable to the agreement, e.g. Administrative Policy 1000 for purchasing procedures, Administrative Policies 235 and 262 for hiring independent contractors, Administrative Policy 870 for applicable software acquisition procedures, and Administrative Policy 435 applicable to games of chance.
3. _____ Determine if the contractor is or has ever been an Oakland University employee. If "yes," call the Controller's Office for further instructions.
4. _____ If the contractor requests to or changes the insurance requirements, call the Risk Management Office. **You have NO AUTHORITY to modify the University's insurance requirements.**
5. _____ Obtain a current insurance certificate(s) from the contractor. Verify that the contractor has the insurance in the amounts required by the agreement.
6. _____ If the contractor requests to or changes the University's Terms or Conditions, contact the Office of Legal Affairs. **You have NO AUTHORITY to modify the University's Terms or Conditions.**
7. _____ If the University will make a payment to the contractor, obtain the contractor's completed, signed, IRS Form W-9.
8. _____ If the contractor is a non-resident alien, obtain the required non-resident alien documentation.
9. _____ If the transaction is a University financing arrangement (e.g. equipment leases) contact the Office of Treasury Management. **You have NO AUTHORITY to obligate the University to indebtedness.**

II. COMPLETE the agreement fully, and sign the agreement only **AFTER it has been signed by the contractor.**

III. AFTER signing the agreement:

1. _____ Deliver a copy of all required purchase documents and agreements to the Purchasing Department, which will deliver a copy of the agreement to the contractor.
2. _____ If the University will be paying the contractor, deliver one copy of the agreement and the contractor's IRS Form W-9 to the Accounts Payable Department.
3. _____ If the contractor is a non-resident alien, deliver a copy of the agreement and the non-resident alien documentation to the Accounts Payable Department.
4. _____ Deliver one copy of the insurance certificate(s) to the Risk Management Office and keep copies of the agreement and insurance certificate(s) for your own records as necessary.

THE PERSON SIGNING THE AGREEMENT ON BEHALF OF OAKLAND UNIVERSITY IS SOLELY RESPONSIBLE FOR COMPLETING AND PROCESSING THE AGREEMENT AS SET FORTH ABOVE BEFORE THE CONTRACTOR PERFORMS ANY SERVICES FOR OAKLAND UNIVERSITY OR USES OAKLAND UNIVERSITY FACILITIES OR GROUNDS. COMPLIANCE WILL BE THE SUBJECT OF INTERNAL AUDITS.

IF YOU HAVE ANY QUESTIONS, CONTACT THE OFFICE OF LEGAL AFFAIRS BEFORE SIGNING AN AGREEMENT.