



Services Agreement Checklist - Not Federal Grants

The checklist below will guide you through the Services Agreement process. For a version of the checklist with information pertaining to Federal grant purchases, [click here](#). Contact PantherExpress Customer Service at 412-624-3578 or submit an [online inquiry](#) if you have questions.

1. Determine which office to approach and whether you need to complete a Services Agreement:

- Review the [Office of Research vs. Purchasing Services](#) chart. If the requested services reflect a **supplier** relationship, then proceed with the Services Agreement process as explained below. If the requested services reflect a **subrecipient** relationship, then contact the [Office of Research](#) at 412-624-7400 or the Grant or Contract Officer assigned to your department.
- Determine whether the Provider is an **independent contractor** or an **employee**. Do this by reviewing the worker classification instructions found [here](#), and then by completing the 20-Factor Test (if applicable) as described in the instructions.
- If the Provider is determined to be an employee - **stop here** - do not proceed with the Services Agreement process or forward the Services Agreement to the PantherExpress-Purchasing Services department. Instead, in most cases,* you must hire the individual through University of Pittsburgh [Human Resources](#). *Contact your [procurement specialist](#) for assistance when contracting with Pitt students.
- If you did not need to take the 20-Factor Test, or if the 20-Factor Test results indicate that the Service Provider is an independent contractor, then proceed with the Services Agreement process as described below.

2. Compile the following documentation, complete, and confirm that the Provider is available in the PantherExpress System:

- Save the 20-Factor Test determination page, if applicable.
- Obtain an IRS W-9, W-8, or applicable IRS document from the Provider.
- Obtain a [Certificate of Insurance](#) that lists the University of Pittsburgh as the Certificate Holder and an additional insured.
- Confirm that the Provider is available in the PantherExpress System. If not, complete a [Supplier Verification form](#) and W-9 or W-8 as appropriate.
- Retain a copy of all above documents as specified in the [Record Retention Policy](#).

For Services Agreements \$10,000 or under

Prepare the following:

- Complete the [Services Agreement \(Short-Form Domestic\)](#) and print;
- Complete the [Schedule A - Scope of Services](#) if the services you are purchasing require detailed explanation;
- Have the Services Agreement (Short-Form Domestic) signed by an authorized manager either on paper or through DocuSign;
- Process through DocuSign or send a scanned version of the Services Agreement (Short-Form Domestic) by fax or email to the Provider with instructions "Provider is to sign the Services Agreement"; and
- Submit the Services Agreement (Short-Form Domestic), all supporting documentation, and (if necessary) a [Supplier Verification form](#) with W-9 or W-8 as appropriate, through the Services Agreement Specialty Form in the PantherExpress System.

For Services Agreements over \$10,000

Consider and submit the following through the Services Agreement Specialty Form in the PantherExpress System:

- Note in Comments in the PantherExpress System if there is:
 - ◆ exchange of confidential or proprietary information;
 - ◆ [Personally Identifiable Information](#);
 - ◆ a Provider accepting [credit card data](#); and/or
 - ◆ a Provider's requirement of publicizing more than just the University's name on a list of customers.
- Results of the 20-Factor Test, [if applicable](#);
- Completed [Contract Entry Form](#) and [Schedule A - Scope of Services](#);
- Provider's quote or proposal;
- [Certificate of Insurance](#) evidencing University requirements;
- Evidence of competitive bidding or a [Directed or Sole Source Justification Form](#) with an approval signature provided by a dean, department director, or department chair; and
- If necessary, a [Supplier Verification form](#) and W-9 or W-8 as appropriate.

3. Submit the Service Provider's Invoice (after satisfactory services are provided):

- Final Step: After satisfactory services are provided, and submit the Provider's invoice through the "create invoice" process in the PantherExpress System against the purchase order number that was created through the Services Agreement Specialty Form in the PantherExpress System.