



# Office of Contracts and Grants

UNIVERSITY OF COLORADO BOULDER

## Service Agreement/Quotation Request

Complete this form to request a service agreement from OCG Service Contracts.

Except when an individual has been delegated quotation authority, OCG is the only unit authorized to enter into service agreements on behalf of the University. Any time a campus unit accepts money in exchange for services provided, a service agreement must be in place.

### REQUESTOR DETAILS

Has this activity been approved for services under your [Rate Based Service Agreement \(RBSA\)](#)? \*

- Yes  
 No - I have an RBSA, but this is a new activity.  
 No - This activity is rate-based, but I don't have an RBSA.  
 No - This activity is scope-based.

**If you select "No", you will be asked to Stop and set up a Service Determination**

**Requestor First & Last Name \***

Jon Doe

**Requestor Email \***

jon.doe@colorado.edu

**Lab/Service Center Name \***

Name of your Core

**Administering Department \***

Your Department

Does the PI have an active [Technology Control Plan \(TCP\)](#) with the Office of Export Control (OEC)? \*

- Yes  
 No

Have you certified rates with [Budget and Fiscal Planning \(BFP\)](#) for the current fiscal year? \*

- Yes  
 No  
 Unsure

Has the customer provided you with an agreement document, or will CU be drafting the agreement? \*

- Customer provided agreement  
 CU will draft the agreement

**Ask the Customer if they have standard text or if the CU text will suffice**

**Requested Deadline**

**NOTE:** This is for awareness only. Due to the complex nature of contract negotiation, OCG Services cannot guarantee agreement completion by a specific date. \*

### CUSTOMER DETAILS

**Customer Legal Name \***

Get details from the Customer

**Customer Legal Address \***

Get details from the Customer

**Ask the Customer for these details in advance**

**Customer Technical Contact - Name \***

Get details from the Customer

**Customer Technical Contact - Email \***

Get details from the Customer

**Customer Technical Contact - Phone**

Get details from the customer

**SERVICE DETAILS****Period of Performance - Start Date \*****Period of Performance - End Date \*****Talk to your finance officer;  
Aligning with the FY is easy to remember****Describe Services \***

Provide a brief description of what the Customer will be using/doing in the Core.

**Describe Deliverables \***

What will the Customer receive? Will the Customer be executing all the work, or will Core staff?

**CU's objective in performing the services. \***

- Data collection
- Relationship development
- Revenue building
- Other

**Describe \***

Fee for Service, Training, and Instrument Access

**Will the Customer provide materials or data to the University? \***

- Yes
- No

**Will Customer representatives be in University facilities hands-on using equipment/resources? \***

- Yes
- No
- Maybe

**Will you travel and/or ship out of the country related to these services? \***

- Yes, both
- Yes, ship
- Yes, travel
- No

**Will Controlled Unclassified Information (CUI) be received or exchanged in the performance of this activity? \***

- Yes
- No

## PAYMENT DETAILS

**Rate/Price \***

What are the rates of the relevant instruments/services?

**Will there be charges in addition to the rate/price? \***

- Yes
- No

**When will you invoice? \***

- Schedule
- Milestone(s)
- Upon Completion of Services
- Upon Acceptance of Quote

**Describe \***

Monthly

**Customer Invoice Contact - Name \***

Get details from Customer

**Customer Invoice Contact - Email \***

Get details from Customer

**University default payment terms are NET 30 days from invoice date. Is this acceptable? \***

- Yes
- No