

INSTRUCTION SHEET FOR ACADEMIC RESEARCH SERVICES ORDER (ARSO) FORM The Pennsylvania State University User Research Facilities

The attached (ARSO) is used by external entities to work with certain user facilities at Penn State. External users have a choice; they can have research performed by the Penn State staff or become personally trained to use the facilities themselves. The ARSO serves as an open order for a specified period of time and for an estimated cost. See detailed instructions below for completing and executing the appropriate forms. General principles are noted below.

1. If the appropriate signature authority for your organization signs the form(s) “as is” (no changes), work can begin immediately. If your organization requires changes to the standard terms and conditions, please see instructions below, under *Terms and Conditions*, for requesting revisions to the language.
2. You will be responsible for all incurred charges regardless of outcome. If your monthly invoices add up to more than the total estimated cost on your original ARSO, you will be required to process an amended ARSO to increase the amount before incurring further charges.
3. If you spend less than the anticipated cost, you won’t be billed for the difference. At the end of the period of performance, the account will be closed and/or renewed for another period of time, if you have additional work.
4. The **External User Term Sheet** only needs to be completed and returned with the ARSO form if representatives of your organization will be personally using the instruments in the facilities (as opposed to having one of our technical staff members perform the work for them); the Term Sheet is a basic risk and liability form for facilities users who are not Penn State employees. If you cannot agree to the standard Terms and Conditions of the External User Term Sheet, please see instructions below, under *Terms and Conditions*, for requesting revisions to the language.
5. We don’t require the original signature version of the form(s) to execute the paperwork; completed forms can be submitted by fax or e-mail to expedite account set up.

Explanation of ARSO Form Fields:

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University	The contact information for the PSU User Research facilities individual to whom you can direct questions regarding the order process.
Estimated Cost	<i>Please add</i> the estimated total that you, in consultation with PSU technical staff, anticipate spending in the facility during the period of time specified on the form. This estimate should cover the entire scope of work that will be entered in the Description of Services field and be no less than \$1,000. You will only be billed for actual costs of services performed. Penn State reserves the right to not accept projects requiring export review or negotiable contracts, based upon cost of implementation in relation to anticipated sponsor spending.
Performance Period	<i>Please add</i> the beginning date and end date of the time period for which you would like to open this order.
Organization Purchase Order No.	An <i>optional</i> field to indicate a PO number; not required to open the ARSO account.
Payment Terms	Note that our terms are Net 30 Upon Receipt. Monthly invoices are distributed by e-mail to the principal investigator (PI) and billing contact around the 15 th of the month for work done during the previous month.
Organization Name	<i>Please add</i> the full legal name of your organization.
Technical Contact	<i>Please add</i> the name, mailing address, phone number, fax number, and e-mail address of the technical contact or principal investigator (PI) from your organization for this research project.
Billing Contact	<i>Please add</i> the name, mailing address, phone number, fax number, and e-mail address of the billing contact person at your organization who should receive copies of invoices that are sent to the PI.
Project Title	<i>Please add</i> a brief descriptive title for this research project.
Facility Analyst/Tech	<i>Please add</i> the name(s) of the main technical contact(s) that you have corresponded with

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Staff Contact(s)	regarding this research project (if known).
Description of Services	<i>Please add</i> a generic statement describing the work you would like to have done (i.e., Characterization of Materials or Sample Analysis); this will allow you the most flexibility in utilizing the various user labs, instruments, and tools without the need to amend/adjust the paperwork to describe other specific technique and sample information.
Checkbox	<i>Please check</i> - IF your company employees will be entering the Penn State facilities to do their own work. (If this box is checked, you will also need to complete and return the External User Term Sheet.)
Endorsements Organization	<i>Please have the appropriate person in your organization sign, date, and provide their Title.</i> If your organization is an academic institution, an authorized official will be a VP, Provost, Member of Office of Sponsored Programs, or those duly appointed by them, as having authority to execute agreements on behalf of the institution.
Endorsements University	Penn State's duly appointed official for executing agreements on behalf of the University. After this signature and date is acquired, you will receive a fully executed copy of the ARSO Form for your files.
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Terms and Conditions	<i>Please read.</i> These are the standard Terms and Conditions under which the Penn State User Research Facilities' operate. If your organization cannot agree to the Terms and Conditions as listed on this ARSO Form or the External User Term Sheet, please strike-through the language you wish to revise and write in your suggested alternate language (use additional sheets if necessary). Complete the remaining portions of the form as required and return. No signature is necessary under these circumstances until all negotiations are complete. Deviating from the standard Terms and Conditions will require review and approval through the Office of Sponsored Programs (OSP). An OSP representative will contact you to negotiate your request. Please be aware that the negotiation process may delay the implementation of your research project by several weeks to months. Please take this delay into consideration when entering your project end date.
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Supplemental Project Information	<i>Please check</i> only one in each category.
Project User Information	<i>Please list</i> the name of each user, if any, for this research project, in addition to the PI listed on page one. (Each additional user will need to complete and return a New User Form.)
Project Title	<i>Please add</i> the same brief descriptive title for this research project as on page one.
Technical Contact (PI) Signature & Date	The PI/Technical Contact listed on page one should also <i>sign and date</i> the ARSO Form.