Processing Service Agreements

Updated on 1/31/2025

What is a Service Agreement?

A service agreement is a binding contract between MURC and vendor that outlines the terms and conditions of the business relationship. It protects both parties by establishing a clear meeting of the minds of the work to be done and the responsibilities of each party.

Determine if you will work with Pre-Award or Post-Award based on the type of agreement.

Pre-Award

Service agreements that are listed under **Contractual** in your grant budget.

This includes:

- Consultants & Consulting Fees
- Professional Services
- Contractual Services

Post-Award

Agreements for the following:

- Software
- Rental/Hotel Agreements
- Equipment
- Maintenance Agreements

RESEARCH CORPORATION

PRE-AWARD OFFICERS

Lisa Daniels,
Senior Contracts and Grants Officer

adkins@marshall.edu

Chris Schlenker,
Senior Contracts and Grants Officer

schlenker@marshall.edu

Amy Lynn Adkins,
Grants Officer

adkins387@marshall.edu

James Westbrook,
Grants Officer

westbrook6@marshall.edu

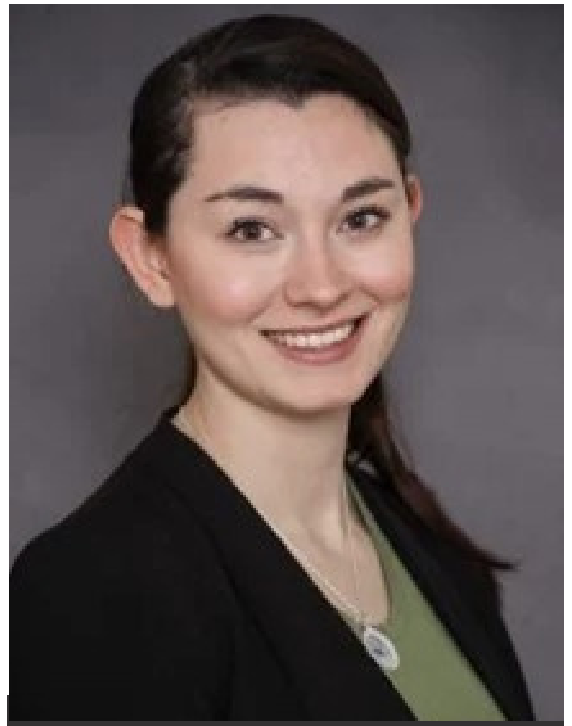
Grace Linz,
Grants Officer

linz3@marshall.edu

Find your Department's Officer at www.marshall.edu/murc/pre-award-services/

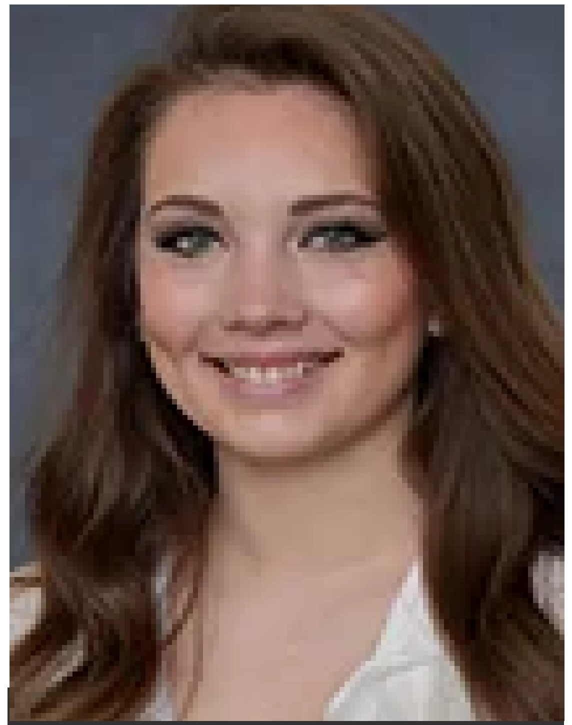
POST-AWARD/COMPLIANCE OFFICERS

RESEARCH CORPORATION



Rebecca Hill,
Senior Grants Compliance Administrator
& Purchasing Card Coordinator

hill286@marshall.edu



Kayla Perry,
Grants Compliance Administrator

starcher41@marshall.edu

Sydney Hunter,
Grants Compliance Administrator

hunter161@marshall.edu

Mary Glen Rice,
Grants Compliance Administrator

rice139@marshall.edu

Cyrah Moore,
Associate Grants Compliance Administrator

moore875@marshall.edu

Find your Department's Officer at www.marshall.edu/murc/post-award-services/

You can use the expense code list to determine how the line item is coded. For example: For items in yellow, you will work with Pre-Award to process your Service Agreement. The full version of the expense code list can be found here.

Expense Code List

703B	Supplies	70543	Non-capitalized Software Licenses	Software licenses less than $5,000; and all software licenses with a term of 1 year or less
703B	Supplies	70544	Computer Equipment less than $5,000	Computer equipment less than $5,000
703B	Supplies	70585	UAV (Drones) < $5,000	Unmanned Aerial Vehicles (Drones) valued less than $5,000
703B	Supplies	71211	Material/Supplies-Cap Asset Project	Material/Supplies purchased for a capital asset project
704B	Contractual	70251	Consultants & Consulting Fees	Agreement with an individual or business to provide consulting services
704B	Contractual	70252	Security Services	Agreement with an individual or business to provide security services
704B	Contractual	70253	Professional Services	Agreement with an individual or business to provide professional services
704B	Contractual	70254	Approved Vendor Contract < $25,000	Expenditures approved for a limited exclusion from MTDC under a contractual arrangement. Procurements using these account codes rquire prior approval. Refer to MURC Subaward and Vendor Contract Guidelines for detailed information.
704B	Contractual	70255	Approved Vendor Contract > $25,000	Expenditures approved for a limited exclusion from MTDC under a contractual arrangement. Procurements using these account codes rquire prior approval. Refer to MURC Subaward and Vendor Contract Guidelines for detailed information.
704B	Contractual	70257	Contractual Services	Agreement with an individual or business to provide contractual services not specifically included in another contractual account code
704B	Contractual	70258	Contracts-Research, Educational, Med	Contractual agreement for Research, Educational, or Medical services
704B	Contractual	70560	Attorney Legal Service Payments	Payments to attorneys for legal services provided (i.e., indigent defense counsel, other defense counsel, legal research, mental hygiene legal services and other related legal services.) Fees paid to attorneys and associated costs.
704B	Contractual	70570	Attorney Reimburseable Expense	Payments to attorneys for reimbursable expenses such as telephone, travel, postage, expert witness, court reporters, private investigations or other related expenses. Fees paid to attorneys for reimburseable expenses.
704B	Contractual	71282	Subrecipient Disbursement < $25,000	Expenditures made under a sub-agreement with another entity, for the purpose of carrying out (part of) the program. For use with Federally funded projects only. Refer to MURC Subaward and Vendor Contract Guidelines for detailed information.

IMPORTANT

The this training will discuss the process for those service agreements that are only under the contractual grant budget line that will involve Pre-Award.

Step 1:

Determine if you are working with a Service Agreement or a Subaward.

If you need assistance making these determinations, please contact your assigned Pre-Award Grants Officer. The **subaward vs. contract checklist** if available if needed to help make the determination. You will also need to provide a statement of activities that will be outsourced.

Step 2:

Determine if you are working with a Service Agreement with Terms or if a MURC Service Agreement is needed.

Service Agreement with Terms

Some vendors have their own agreement/terms that they send for review and signature. These are often larger sum contracts/agreements and often have a service period attached to them. These types of agreements must be sent to Pre-Award to review, negotiate, and approve.

Examples of Services: This can include engaging an evaluator like Dr. Jane Doe for program evaluation, hiring a vendor for website setup, curriculum development assistance, or meeting facilitation. They might also involve proprietary programs such as ASIST, Mental Health First Aid, QPR, etc. If uncertain, please seek clarification.

MURC Service Agreement

MURC has a service agreement form that is used when outside vendors do not have their own agreements. These agreements under $10,000 do not require Pre-Award's approval before being sent to the vendor for signature.

Examples of Services: Presentations, curriculum development, website, meeting facilitation, subject matter experts, speaker honorarium, and student stipends.

PI/PD will need to complete the MURC Service Agreement Form.

MARSHALL UNIVERSITY RESEARCH CORPORATION

SERVICE AGREEMENT

Vendor #

Vendor Phone #

Vendor Address:

Vendor Email:

Agreement #

*Put the requisition number here.

MURC Fund #

MURC Org #

I, ____ agree to perform the following service for Marshall University Research Corporation:

____

______________________ *Just a brief description is needed here. ______________________

____

____

Date(s) of Service* ________________ to ________________

The rate of pay shall be $ ________________ per _ Select One ___ not to exceed ________________.

All invoices must be submitted using the attached invoice template. Rc{o gpvy lmdg o cf g wr qp tgegk vqh the attached kgo k gf lpxqleg hqt i qqf ulugtxlegu rtqxlf gf 0Any invoices submitted on a different form than the one provided on page two of this agreement will be returned to the vendor .

Authorized Travel Expense:

- [ ] Will not be reimbursed.
- [ ] Will be reimbursed upon documentation in accordance with the policies set forth by MURC, not to exceed ________________.

*If this box is checked, PI/PD must following the MU Travel Policy found **here.**

As an independent contractor, I am responsible for all employment taxes associated with the income I earn.

I certify that I am a citizen of the United States of America or an authorized alien eligible to work in the United States.

Vendor's Signature ____________________________ Date ___________ S.S.N./F.E.I.N. _____________

APPROVED BY:

Project Director's Signature/Date

Marshall University Research Corporation Signature/Date

* If greater than 6 months, provide written explanation.

MURC-1 (May 2024)

*The PI needs to sign here unless the PD has been granted signature authority. To get signature authority, the PI will need to email the assigned Post-Award Officer and grant permission. The PI will copy the PD on this email.

Step 3: Work with your Pre-Award Officer as needed to complete the following documents.

For agreements $10,000 and over:
If the vendor was named in the budget, then the Vendor Checklist and quotes are not required.

Agreements Between $0 and $9,999

- The Service Agreement
- MURC Addendum, when the agreement contains terms and conditions

Agreements Between $10,000 and $49,999

- Quotes from three vendors or direct award form must be completed. You are only required to complete one or the other.
- The department is permitted to gather their own quotes at this level. The vendor with the lowest quoted price should be selected
- Direct Award Form– If there is only one vendor that can provide the good/service, a direct award form should be completed.
  - If the vendor was named in the budget, then the direct award form would be applied, and quotes are not required.
- The Service Agreement
- MURC Addendum, when the agreement contains terms and conditions.
- Vendor Checklist - A competitive quote process is required so this checklist must be completed.

Agreements Greater Than $50,000

- Formal bidding or direct award form is required (consult with MU office of Purchasing) You are only required to complete one or the other.
  - MU purchasing will solicit quotes through formal bidding. The department is not permitted to request their own quotes at this purchasing level.
  - Direct Award Form– If there is only one vendor that can provide the good/service, a direct award form should be completed.
    - If the vendor was named in the budget, then the direct award form would be applied, and a bid is not required.
- The Service Agreement
- MURC Addendum, when the agreement contains terms and conditions.
- Vendor Checklist - ·A competitive bid process is required so this checklist must be completed.

Additional Step for Agreements over $10,000

Email all documentation above to Pre-Award for review. Your Grants Officer will send an approval email copying Kristen Webb, Contract and Subaward Compliance Officer.

Kristen Webb, Contract and Subaward Compliance Officer.

Kristen will review of the agreement and supporting documents. She will ensure that Dr. Maher's signs the agreement and that it is sent to the MU Purchasing Office to get converted to a Purchase Order (PO). She will also reach out to the MU Purchasing Office on the PI's behalf to check the status of a PO.

Kristen Webb,
Contract & Subaward
Compliance Administrator

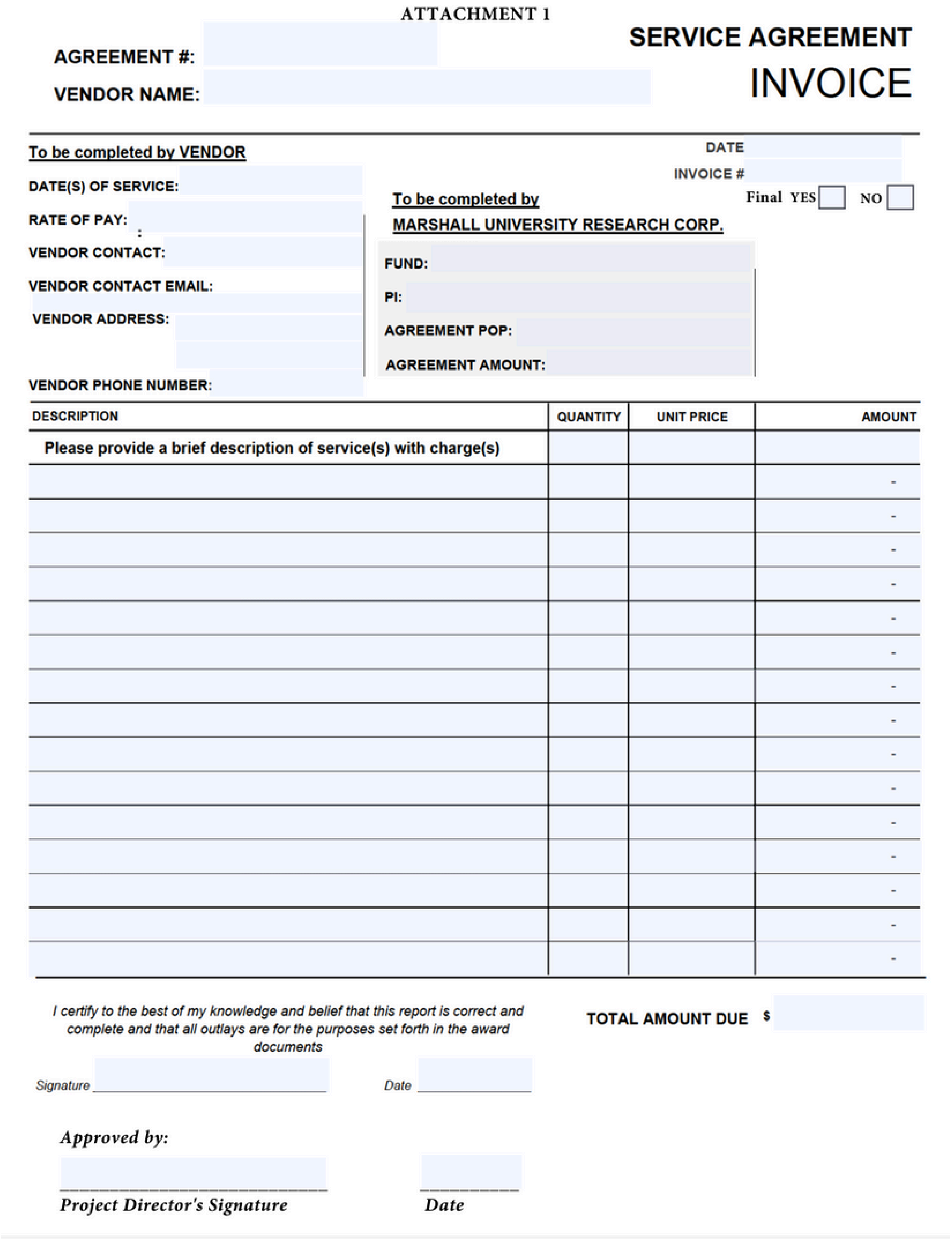
kristen.webb@marshall.edu

Step 4:

Send the service agreement and MURC Addendum to the vendor for signature. The *MURC Service Agreement Invoice should also be sent at this time so that the vendor can invoice once the agreement has been set up. While awaiting vendor signature, proceed to Step 5 for vendor setup.

***Please note -** [The MURC Service Agreement Invoice] is required to be completed by the vendor when invoicing against a Purchase Order (PO) to ensure standardized and compliant documentation of services provided. This ensures all required information is captured for auditing and financial reporting, streamlining the payment process.

Invoices should not be submitted with the signed Service Agreement.



ATTACHMENT 1

SERVICE AGREEMENT

INVOICE

AGREEMENT #:

VENDOR NAME:

To be completed by VENDOR

DATE(S) OF SERVICE:

RATE OF PAY:

VENDOR CONTACT:

VENDOR CONTACT EMAIL:

VENDOR ADDRESS:

VENDOR PHONE NUMBER:

DATE

INVOICE #

Final YES ☐ NO ☐

To be completed by MARSHALL UNIVERSITY RESEARCH CORP.

FUND:

PI:

AGREEMENT POP:

AGREEMENT AMOUNT:

DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
Please provide a brief description of service(s) with charge(s)			
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-

I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays are for the purposes set forth in the award documents

TOTAL AMOUNT DUE $

Signature ____________ *Date* ____________

Approved by:

Project Director's Signature ____________ *Date* ____________

Step 5:

Determine if the vendor has been set up by using the **FTIIDEN** screen in **Banner**. You can also use Banner screen **FTMVEND** to view the vendor's address to ensure you are working with the correct vendor.

If not set up in Banner: Email the vendor and provide them with this link. See the email template to send to the vendor here. This dynamic form will get the vendor set up in the Banner payment system. It is the PI/PD responsibility to check back in Banner to see if the vendor has been set up.

If you need to update vendor information, such as their address, please email Kim Fry, and she will handle the update.

Banner Screen FTIIDEN

Visit Banner here and use the screen **FTIIDEN** in the search bar. This screen will be used first to locate the vendor number (FEIN# if working with an organization). You will need to use screen **FTMVEND** to view the vendors address.

1. Click on the light green box under the 'Last Name' field

2. In the 'Last Name' box, type the Vendor's name.

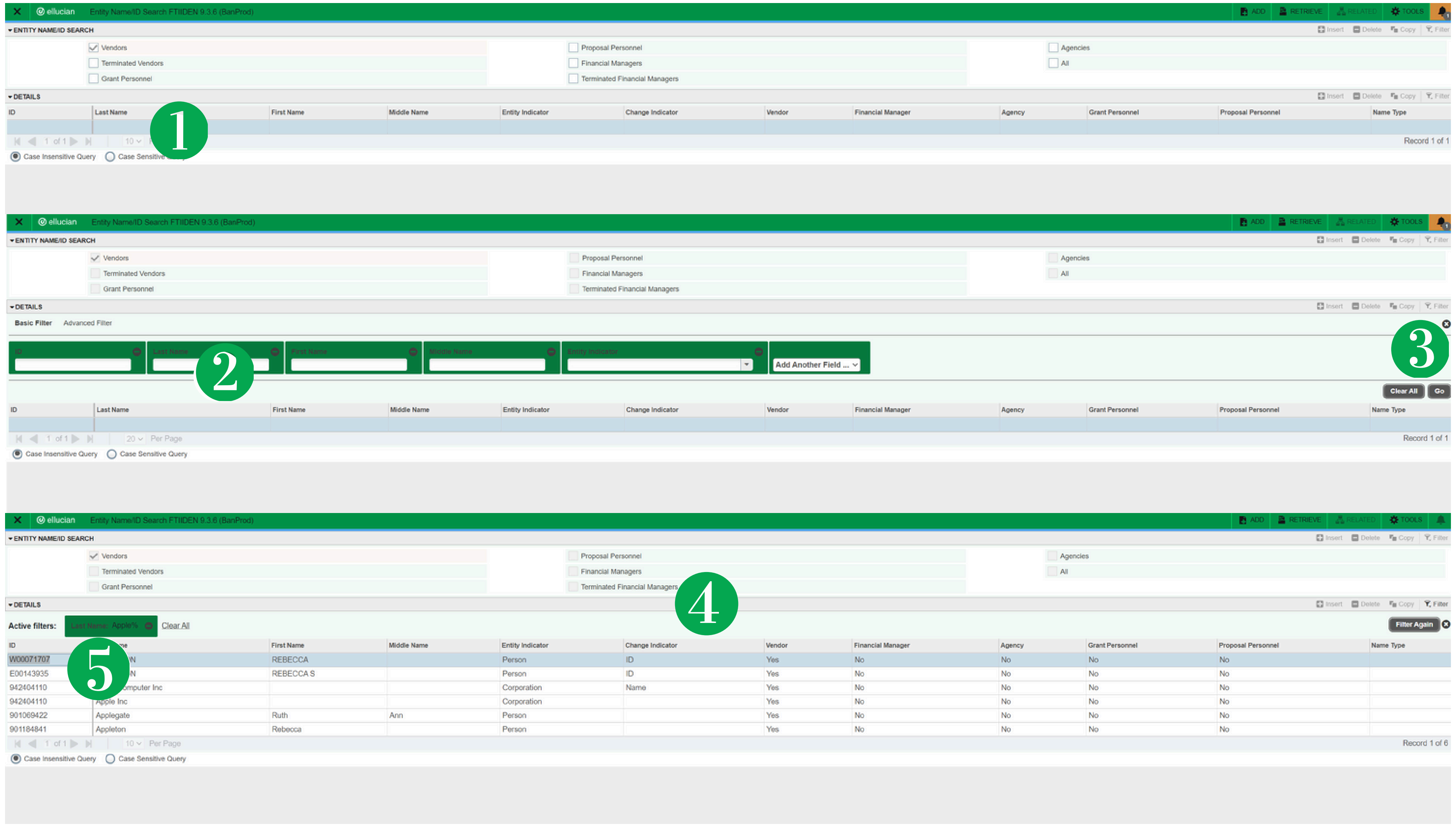
Hint: If you are unsure of the exact name, you can try a variation of what you think it may be and type the wildcard, %, after the name. It will pull up all IDs in Banner that have those characteristics.

3. Hit F8, or click 'Go'

4. It will populate all the options with your search criteria

5. The vendor number (FEIN #) can be located in the ID box.

6. Write down the vendor number (FEIN #). It will be needed to view the address in Banner screen **FTMVEND**.



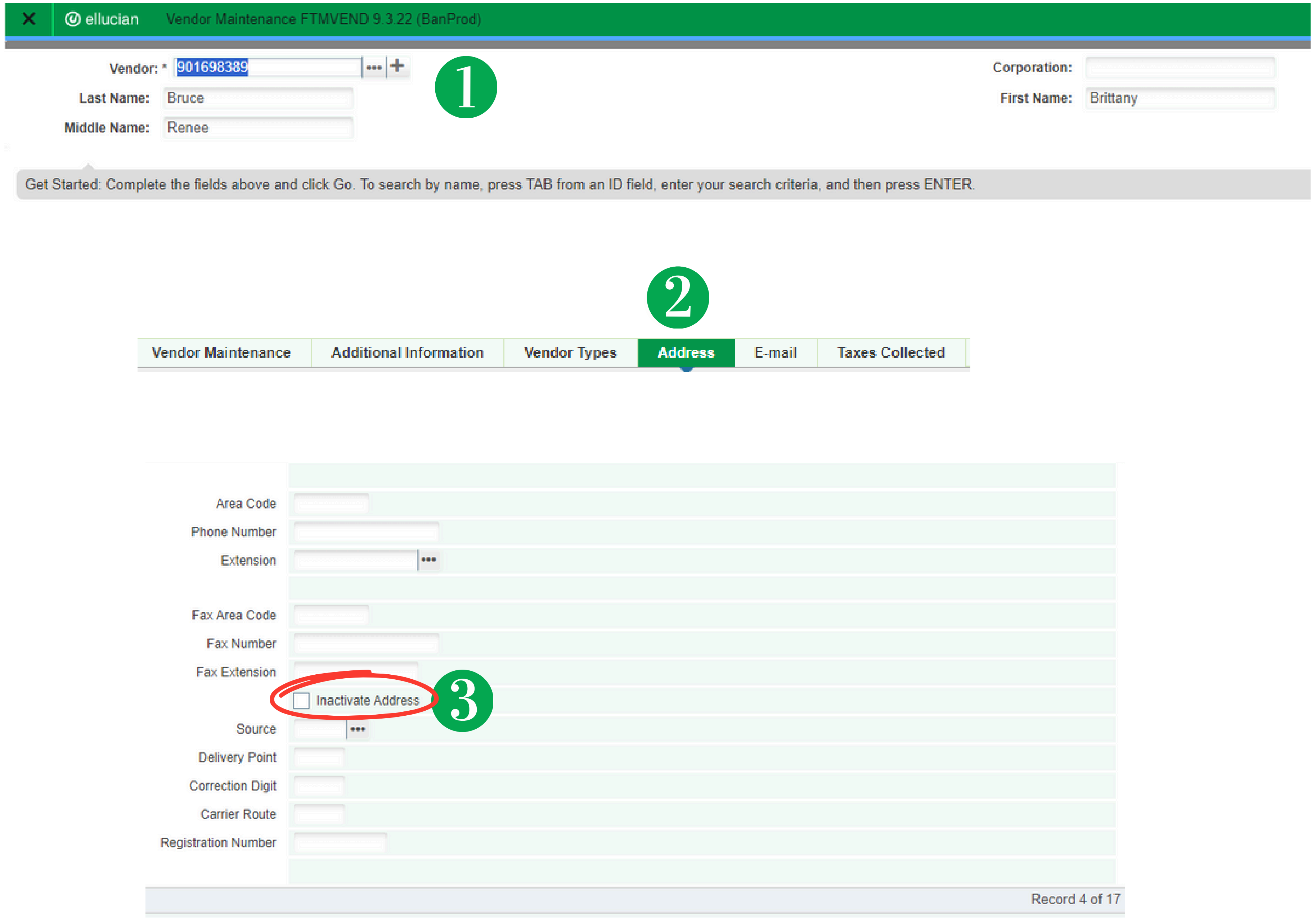
Banner Screen FTMVEND

Visit Banner here and use screen **FTMVEND** in the search bar. This screen is used to view the vendors address to ensure you are working with the correct vendor.

1. Type in the vendor number and click ‘Go’

2. On the next screen select ‘Address’ to check that you are working with the correct vendor.

3. If the vendor has multiple address records, you will need to use the arrows to move through the records to find the one with the ‘Inactivate Address’ box unchecked. This is the current address for the vendor.



Setting up a New Vendor

The Marshall University Purchasing Office has a registration form that the vendors must complete. The PI/PD will need to email the vendor with the below language, where they will answer some question and attach a copy of there W-9.

Email to send to vendor:

Hello - I hope you are well. As a new vendor you will need to be set up in the Marshall University payment system, you will need to complete a Vendor Registration Form that has been provided online for your convenience.

The form can be found here https://www.marshall.edu/purchasing/resources/vendor-registration/

Once you are on the Office of Purchasing webpage, click on Complete Vendor Registration Form. You will follow the instructions, if there is a field that does not apply to you, fill in NA in that space. At the top left you will see TIN: please add your Social Security number there, as the purchasing office is working to change the label for that spot.
Next, click on the W9 link in blue and fill out a W9 for tax purposes.

Please let me know once you have completed this.
Thank you,

Step 6:

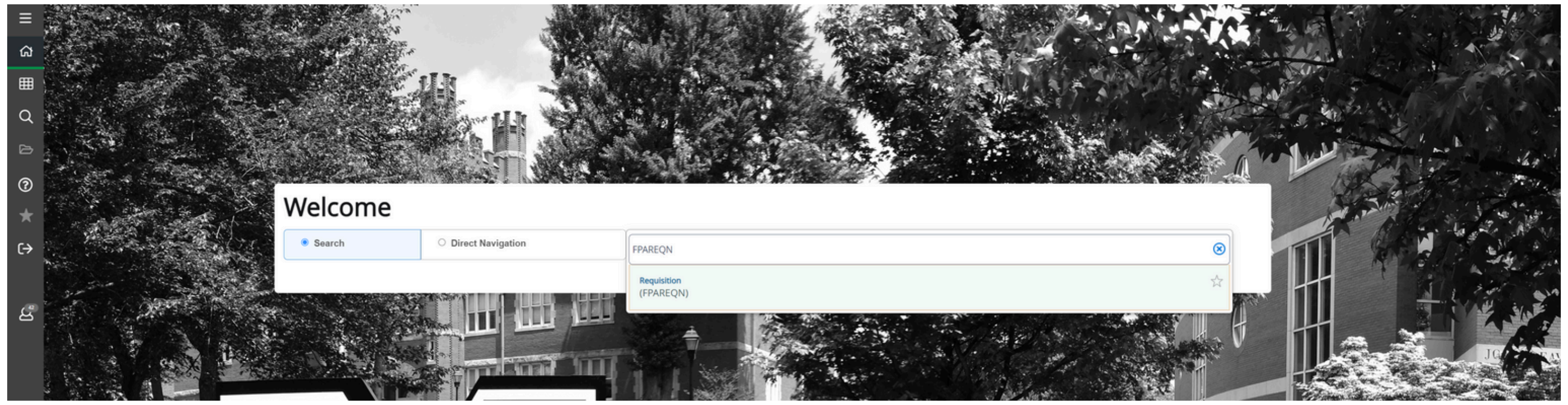
Once the vendor has signed the agreement, create a Requisition using screen **FPAREQN** in Banner.

The requisition will need to be approved based on how your department’s approval queue is set up.

Creating a Requistion

Visit Banner *here* and use screen FPAREQN in the search bar:

On the next screen type NEXT in the Requisition Number box.
Then hit GO or use Alt Page Down.

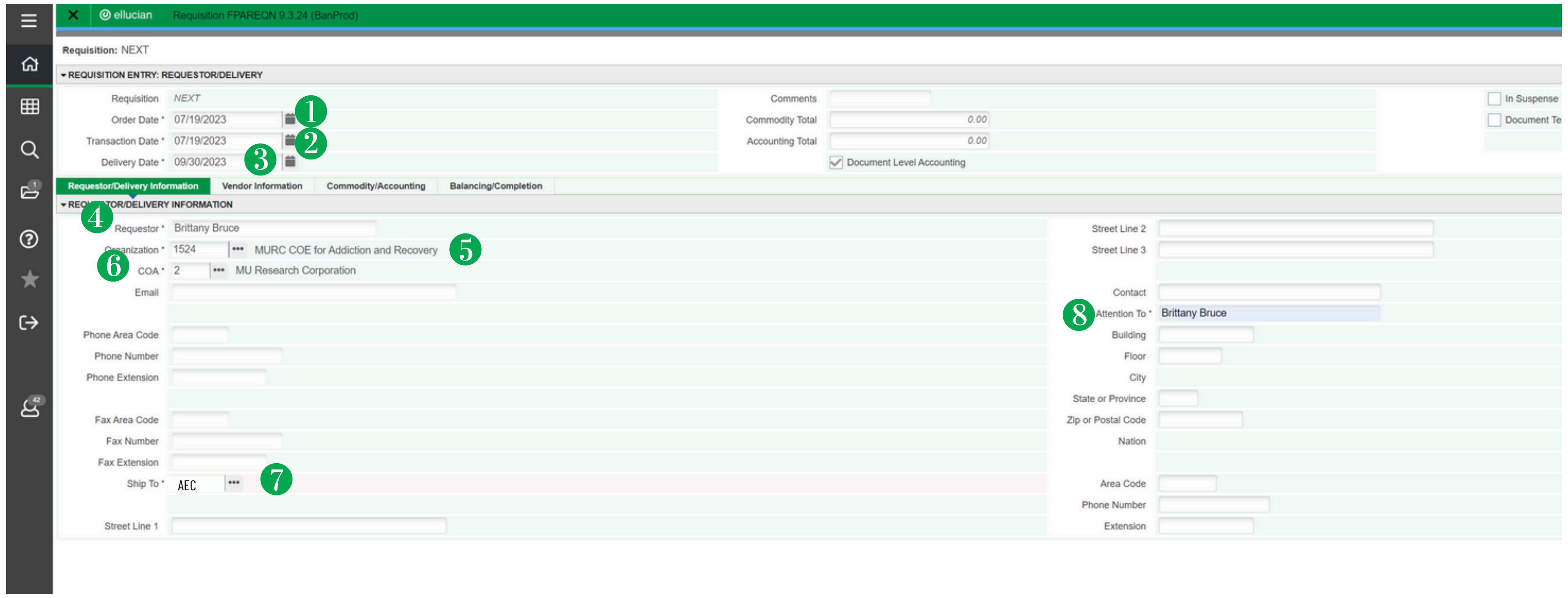


First Screen: Requestor/Delivery Information

Fill in:

1. **Order Date** – This should prefill
2. **Transaction Date** – This should be prefilled
3. **Delivery Date -** Type in the date for the end of the Fiscal Year
4. **Requestor** – Your name (This should be prefilled)
5. **Organization** – This is the org. that is associated with the fund
6. **COA -** 2 (MU Research Corporation).
7. **Ship to -** AEC
8. **Attention to -** This can be the PI/PD or an admin.

Hit the down arrow or hld down the Alt & Page Down buttons to continue

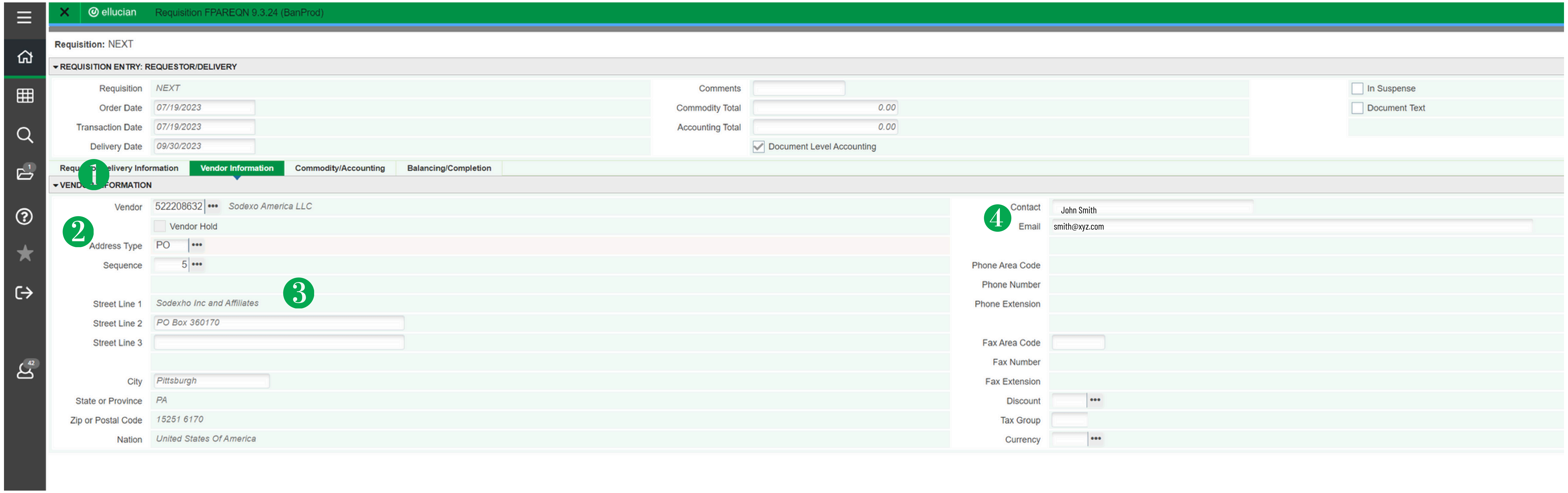


Second Screen: Vendor Information

Fill in:

1. **Vender** – If you do not know the vender #, you can hit the three dots to search.
   - Go to the last name and put an % before and after your search.
   - Hit go and a list should pop up.
   - Click the correct vendor information. This will return you to the previous page.
2. **Sequence** - 1 (This should be prefilled).
3. **Address Type** - PO (This should be prefilled).
4. **Contact** - Provide the vendor name and email address.

Hit the down arrow or hold down the alt & page down button to continue



Third Screen: Commodity/Accounting

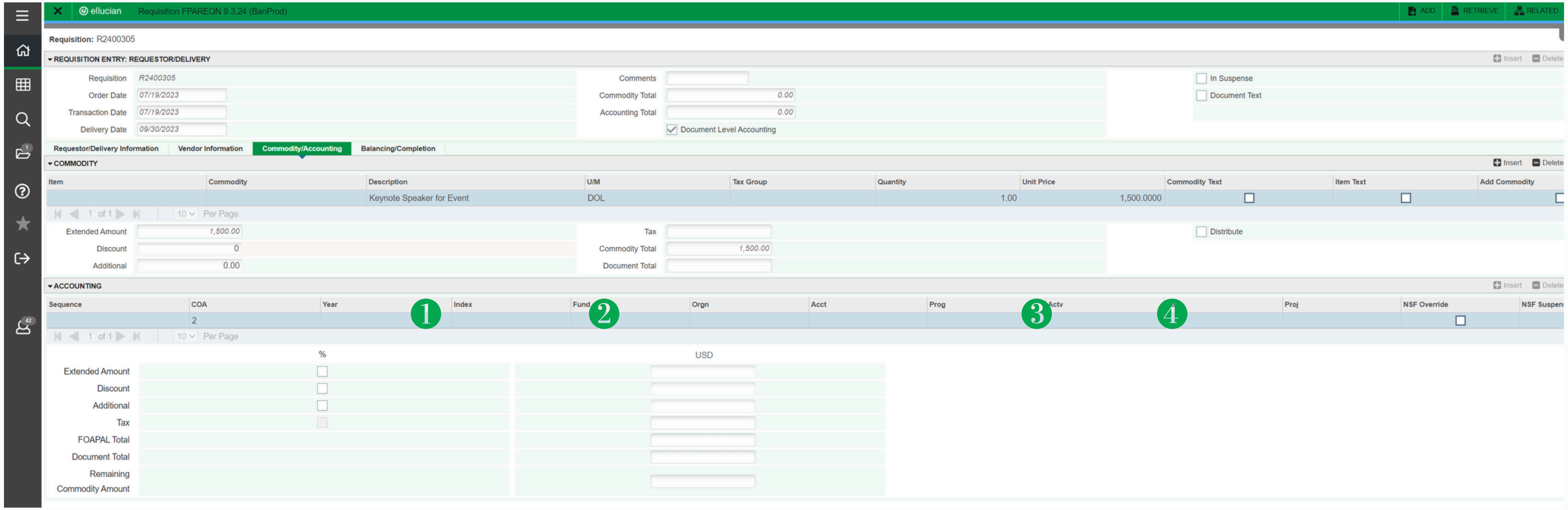
Reminder: Write down the requisition number at this step.

Commodity Section:

Fill in:

1. **Description** - Keynote Speaker for Event or Service Agreement
2. **U/M** - This will be DOL (dollars)
3. **Quantity** - Amount listed on the agreement.
4. **Unit Price** - 1

Remember: Use the TAB button to move to the next section.

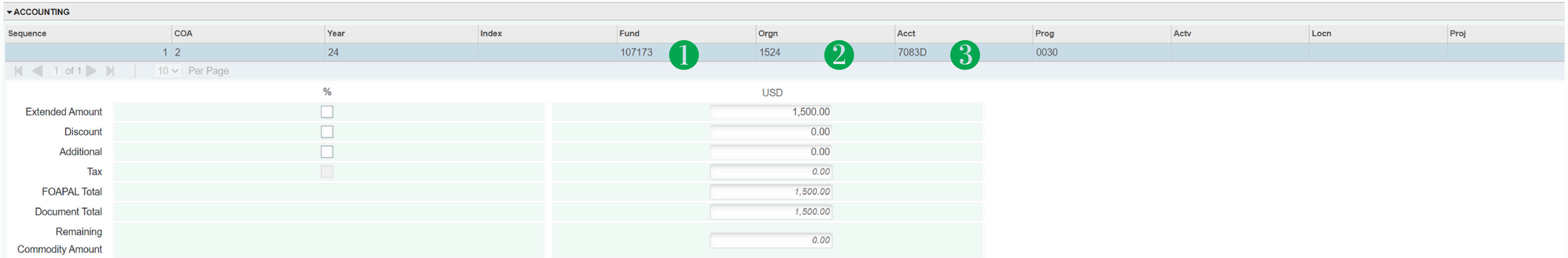


Accounting Section:
Hold Alt & Page Down buttons to continue to the accounting section and always use the TAB button to move through each section.

Fill in:

1. **Fund**
2. **Orgn Acct -** You can find the appropriate account code by selecting the three dots in the Acct box.
   Example: Contractual Services 70257

Hit F10 to save and then Alt Page Down



ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj
1	2	24		107173	1524	7083D	0030			

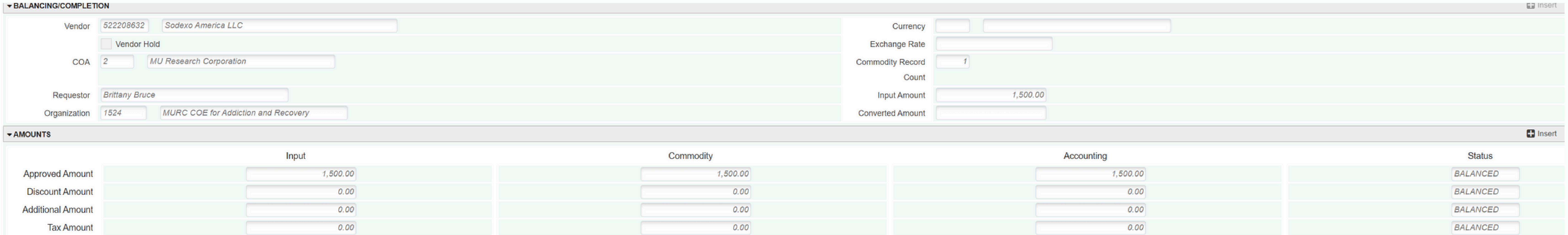
1 of 1 10 Per Page

	%	USD
Extended Amount		1,500.00
Discount		0.00
Additional		0.00
Tax		0.00
FOAPAL Total		1,500.00
Document Total		1,500.00
Remaining Commodity Amount		0.00

Creating a Requistion continued.

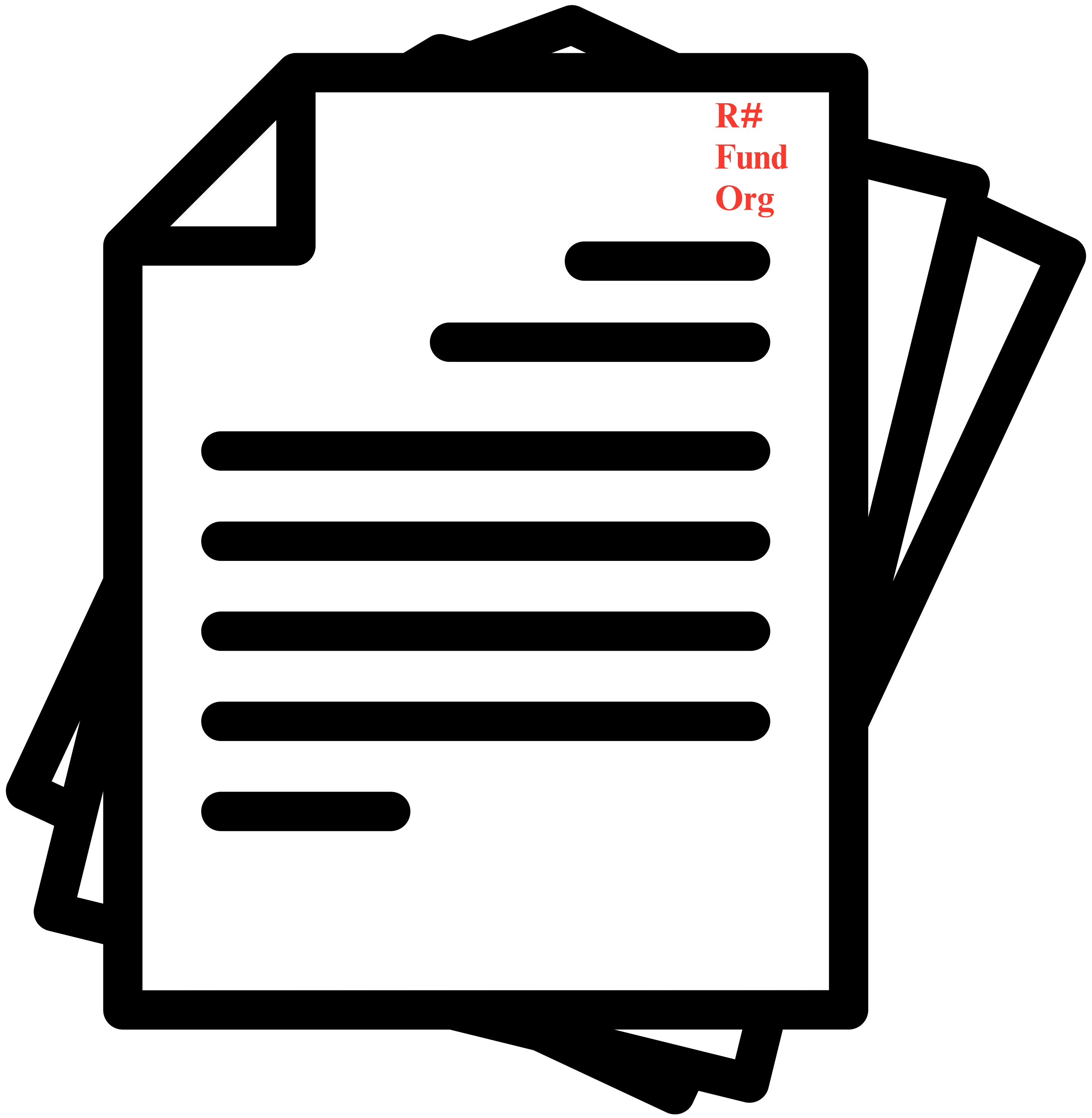
Balancing/Completion Section:

- Everything on this page will be prefilled.
- IMPORTANT: Make sure to write down the requisition # that is listed at the top of the page. Once you complete the requisition there is no way to go back and get the requisition #.
- At the bottom left side of the screen hit complete.



Step 7:

Include the requisition number, fund number and org number on the top right of the service agreement and MURC Addendum (if applicable).



Step 8:

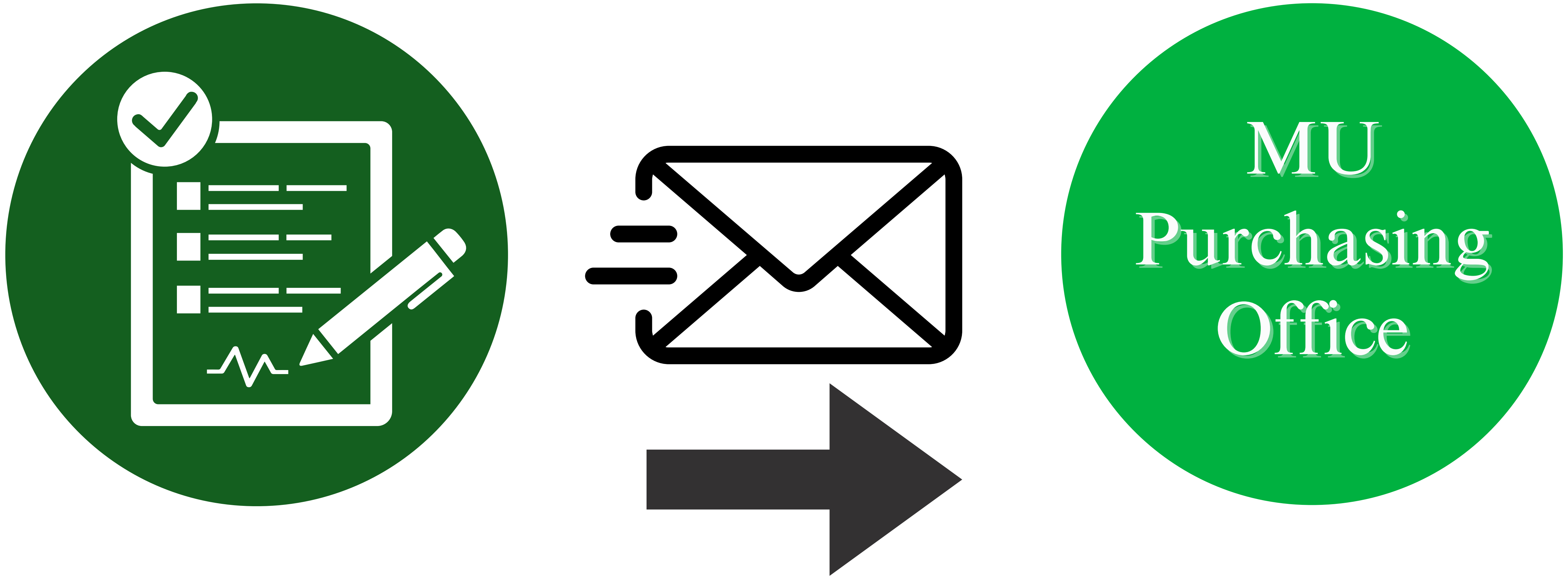
The service agreement and required documents listed in Step 3 need to be emailed to Kristen Webb in **separate .pdfs** to ensure that documentation is not overlooked.

Step 9:

Kristen Webb will review and send to Dr. Maher for final signature.

Step 10:

Once signed, Kristen Webb will send the fully executed agreement to the MU Purchasing Office to be converted to a Purchase Order (PO). The contact in the department will be cc'd on the email to the Purchasing Office.



Step 11:

Once the Purchasing Office has created the Purchase Order (PO), a copy of the fully executed agreement will be sent to the vendor, PI and/or the department administrator for their records.

Note: the RC in the purchase order number is simply a Research Corporation indicator.

Marshall University Research Corporation 1987 MARSHALL

Office of Purchasing
125 Old Main
One John Marshall Drive
Huntington, WV 25755-4100

PURCHASE ORDER
Number: RC- P

Please show this number on all packages and documents related to this order

Voice: (304) 696-2598 Fax: (304) 696-3333

Date: 11/06/2023

Vendor:

Ship To: ARTHUR WEISBERG FAMILY APPLIED ENGINEER
AEC
1676 THIRD AVE
HUNTINGTON WV 25703
Requisition #: R2401212

Invoice to: Marshall University Research Corporation; Accounts Payable; One John Marshall Drive, Huntington, WV 25755-8100
Voice: 304-696-6203 Fax: 304-697-3861

Address all other correspondence to the Purchasing Department

PLEASE ACKNOWLEDGE RECEIPT OF THIS ORDER AND GIVE DEFINITE DELIVERY DATE

Item	Item Description	Units	Unit Price	Extended Price
1				

FOB:	TERMS:	DISCOUNT:	$0.00
PURCHASING AGENT:	Melanie Gallaher (304) 696-6356	ADDL CHARGES:	$0.00
AUTHORIZED SIGNATURE:	Misty DiSilvio	TOTAL TAXES:	$0.00
Attorney General's Signature (if required):		TOTAL:	

Next Step: Once the PO has been step up the vendor can begin invoicing.

MARSHALL
RESEARCH CORPORATION

Service Agreement Invoicing Process

Updated on 12/4/2024

When invoicing against a Purchase Order (PO), the vendor is required to complete the MURC Service Agreement Invoice to ensure all relevant information is properly recorded and that the invoicing aligns with the terms of the service agreement. It is all right if the vendor attaches their own invoice, but they must use the MURC Invoice. **This document must be completed by the vendor.**

The agreement number (RC-P# or P#) must be included on all invoices. This number is on the final PO (fully executed service agreement), a copy of which the vendor should have on file. Including this number helps to streamline the processing and ensures accurate tracking of the contract.

MARSHALL UNIVERSITY RESEARCH CORPORATION 1987

Office of Purchasing
125 Old Main
One John Marshall Drive
Huntington, WV 25755-4100

Voice: (304) 696-2598 Fax: (304) 696-3333

PURCHASE ORDER
Number: RC- P
Please show this number on all packages and documents related to this order

Date: 11/06/2023

Ship To: ARTHUR WEISBERG FAMILY APPLIED ENGINEER
AEC
1676 THIRD AVE
HUNTINGTON WV 25703
Requisition #: R2401212

Invoice to: Marshall University Research Corporation; Accounts Payable; One John Marshall Drive, Huntington, WV 25755-8100
Voice: 304-696-6203 Fax: 304-697-3861

Address all other correspondence to the Purchasing Department

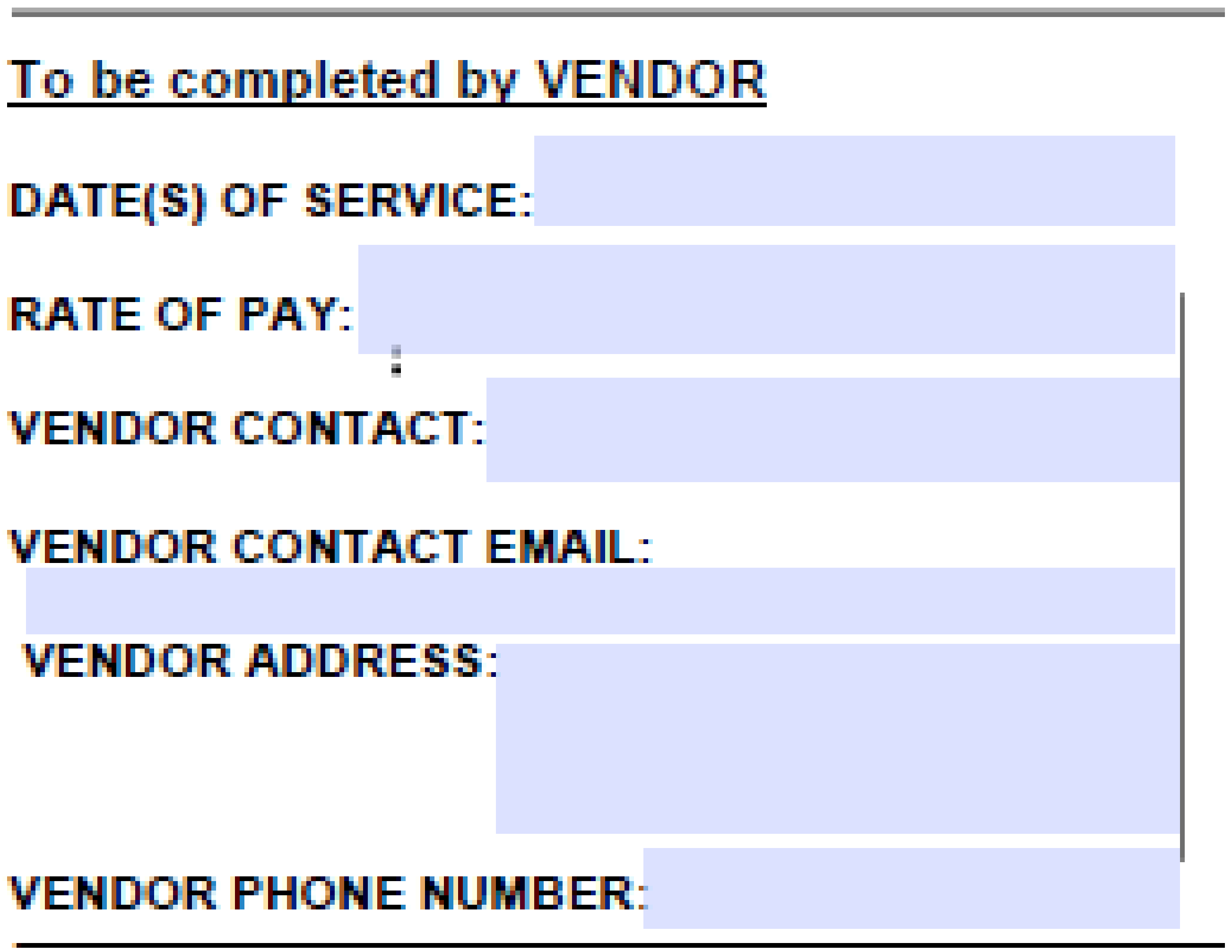
PLEASE ACKNOWLEDGE RECEIPT OF THIS ORDER AND GIVE DEFINITE DELIVERY DATE

Item	Item Description	Units	Unit Price	Extended Price
1				

FOB:	TERMS:	DISCOUNT:	$0.00
PURCHASING AGENT:	Melanie Gallaher (304) 696-6356	ADDL CHARGES:	$0.00
AUTHORIZED SIGNATURE:	Misty DeSilva	TOTAL TAXES:	$0.00
Attorney General's Signature (if required):		TOTAL:	

Complete the Vendor Section:

The vendor must fill out all necessary details in the "To be completed by vendor" section of the invoice. This includes the vendor's name, contact information, and other requested details.


To be completed by VENDOR

DATE(S) OF SERVICE:

RATE OF PAY:

VENDOR CONTACT:

VENDOR CONTACT EMAIL:

VENDOR ADDRESS:

VENDOR PHONE NUMBER:

Assign an Invoice Number:

AGREEMENT #:

VENDOR NAME:

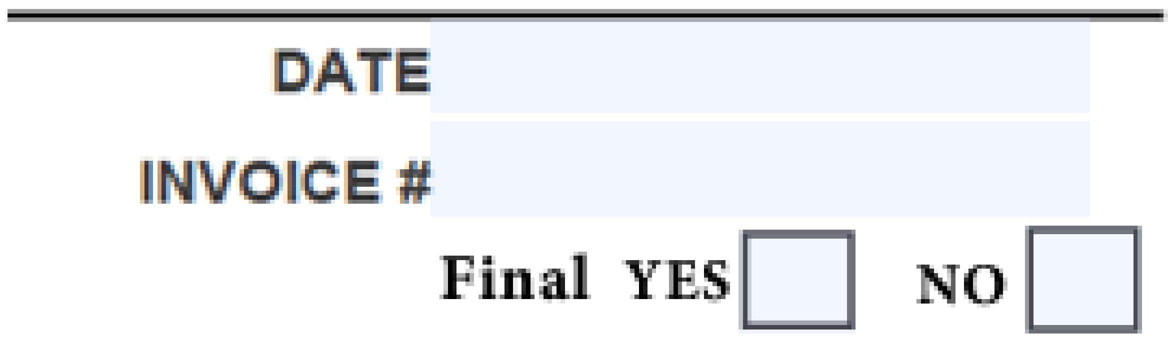
SERVICE AGREEMENT

INVOICE

The vendor will assign a unique invoice number and include the date of the invoice.

Step Check the Final Invoice Box:

If applicable, the vendor should check the box indicating whether this is the final invoice for the service agreement.


DATE

INVOICE #

Final YES ☐ NO ☐

Provide Service Details:

The invoice must include a brief description of the services provided. For vendors paid on an hourly basis, a detailed breakdown of the days worked, hours worked per day, and the rate of pay should be listed. This breakdown ensures transparency and clarity for both parties involved.

DESCRIPTION
Please provide a brief description of service(s) with charge(s)

Total Amount and Signature:

All invoices must include the total amount for the services rendered.

The vendor must sign and date the invoice, certifying that the charges are true and accurate as per the agreement.

I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays are for the purposes set forth in the award documents

TOTAL AMOUNT DUE $

Signature ____________________________ *Date* ______________

Approved by:

____________________________ __________

Project Director's Signature ***Date***

PI Review and Approval:

The Principal Investigator (PI) will review the charges and ensure they align with the services described in the service agreement. Once the PI is satisfied, they will sign the invoice on the designated line at the bottom of the form.

Submit for Processing:

The signed invoice, along with any required supporting documentation, should be sent to Kristen Webb, Contract and Subaward Compliance Officer and copying Kristen Martin, Senior Finance Officer for review. Once reviewed and approved, it is submitted for payment.

Ensure Payment Received:

PIs are responsible to ensure that the vendor has received the payment. You can use Banner Screen FGIENCD.