

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



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RESEARCH **CORPORATION**



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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.

Software licenses less than \$5,00 Non-capitalized Software Licenses 703B Supplies 70543 vear or less 703B Supplies 70544 Computer Equipment less than \$5,000 Computer equipment less than \$ 703B 70585 UAV (Drones) < \$5,000 Supplies Unmanned Aerial Vehicles (Dron 703B 71211 Material/Supplies-Cap Asset Project Material/Supplies purchased for Supplies 70251 704B Contractual Consultants & Consulting Fees Agreement with an individual or 704B 70252 Security Services Contractual Agreement with an individual or 704B 70253 Professional Services Contractual Agreement with an individual or Expenditures approved for a limit contractual arrangement. Procur 704B Contractual 70254 Approved Vendor Contract < \$25,000 prior approval. Refer to MURC Su detailed information. Expenditures approved for a limi contractual arrangement. Procur 704B Contractual 70255 Approved Vendor Contract > \$25,000 prior approval. Refer to MURC Su detailed information. Agreement with an individual or 70257 Contractual Services 704B Contractual specifically included in another c 704B 70258 Contracts-Research, Educational, Med Contractual Contractual agreement for Resea Payments to attorneys for legal s 704B Contractual 70560 Attorney Legal Service Payments counsel, other defense counsel, and other related legal services.) Payments to attorneys for reimb Attorney Reimburseable Expense 704B Contractual 70570 postage, expert witness, court re related expenses. Fees paid to at Expenditures made under a subpurpose of carrying out (part of) 704B Contractual 71282 Subrecipient Disbursement < \$25,000 projects only. Refer to MURC Sub detailed information.

Expense Code List

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agreement with another entity, for the
baward and Vendor Contract Guidelines for



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 <u>your assigned Pre-Award Grants</u> <u>Officer</u>. The <u>subaward vs. contract checklist</u> 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 <u>must</u> 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. <u>These agreements under \$10,000 do not require Pre-Award's approval before being sent to the vendor for signature.</u>

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 #									
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*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.

*Put the requisition number here.

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to work in the United

E.I.N.

Corporation Signature/Date

MURC-1 (May 2024)



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
- <u>MURC Addendum</u>, when the agreement contains terms and conditions

Agreements Between \$10,000 and \$49,999

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

	Agreements Greater Than \$50,000
or	• Formal bidding or direct award form is required (consult with MU office of
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41	• The Service Agreement
the	contains terms and conditions
and	• Vendor Checklist - • A competitive hid
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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 <u>Kristen Webb, Contract and Subaward Compliance Officer.</u>

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 - <u>The MURC Service Agreement Invoice</u> 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

AGREEMENT #:

INVOICE

VENDOR NAME:

To be completed by VENDOR			DATE	
DATE(S) OF SERVICE:	To be completed by		INVOICE #	Final VES NO
RATE OF PAY:	MARSHALL UNIVER	SITY RESE	ARCH CORP.	
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VENDOR ADDRESS:	AGREEMENT POP:			
	AGREEMENT AMOUNT			
VENDOR PHONE NUMBER:			-	
DESCRIPTION		QUANTITY	UNIT PRICE	AMOUNT
Please provide a brief description	n of service(s) with charge(s)			
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ignature		Date	

TOTAL AMOUNT DUE \$

Approved	by:
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Project	Directo	r's Sign	ature

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 <u>link</u>. See the email template to send to the vendor <u>here</u>. 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 <u>here</u> 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**.

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							Report 1 of 6

Record 1 of 6

Banner Screen FTMVEND

Visit Banner <u>here</u> 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.

	X @ ellucian Vendor Maintenance FTMVEND 9.3.22 (BanProd)	
1. Type in the vendor number and click 'Go'	Vendor: * 901698389 + + Last Name: Bruce Middle Name: Renee	Corporation: First Name: Brittany
	Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.	
2. On the next screen select 'Address' to check that you are working with the correct vendor		
working with the correct vendor.	2	
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	Vendor Maintenance Additional Information Vendor Types Address E-mail Taxes Collected	
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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 <u>https://www.marshall.edu/purchasing/resources/vendor-registration/</u>

Once you are on the Office of Purchasing webpage, click on <u>Complete Vendor Registration Form</u>. 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

	Comments				In Susp
	Commodity Total	0.00			Docum
	Accounting Total	0.00			
		Document Level Accounting			
Balancing/Completion					
			Street Line 2		
5			Street Line 3		
			Contact		
			Attention To *	Brittany Bruce	
			Building		
			Floor		
			City		
			State or Province		
			Zip or Postal Code		
			Nation		
			Area Code		
			Phone Number		
			Extension		

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

≡	× @ ellucian	Requisition FPAREON 9.3.24 (BanProd)	
ፊ	Requisition: NEXT		
		EQUESTOR/DELIVERY	
⊞	Requisition	NEXT	In Suspense
ш	Order Date	07/19/2023 Commodity Total 0.00	Document Text
\circ	Transaction Date	07/19/2023 Accounting Total 0.00	
\sim	Delivery Date	09/30/2023 Document Level Accounting	
	Require Pelivery Info	rmation Vendor Information Commodity/Accounting Balancing/Completion	
	▼ VEND		
୭	Vendor	522208632 ••• Sodexo America LLC	Contact John Smith
\odot	\mathbf{O}	Vendor Hold	Email smith@xyz.com
+	Address Type	PO	
	Sequence	5 •••	Phone Area Code
۲ð			Phone Number
٢,	Street Line 1	Sodexho Inc and Affiliates	Phone Extension
	Street Line 2	PO Box 360170	
	Street Line 3		Fax Area Code
(42)			Fax Number
8	City	Pittsburgh	Fax Extension
	State or Province	PA	Discount +++
	Zip or Postal Code	15251 6170	Tax Group
	Nation	United States Of America	Currency

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.

≡	× Ø ellucian	Requisition FPAREQN 9.3.24 (Banf	Prod)							ADD	RETRIEVE
~	Requisition: R240030	5									
ഹ	- REQUISITION ENTRY: F	REQUESTOR/DELIVERY									🚼 Insert 🛛 🗖 Delete
Ē	Requisition	R2400305		Comments				[In Suspense		
	Order Date	07/19/2023		Commodity Total	0.00			[Document Text		
\circ	Transaction Date	07/19/2023		Accounting Total	0.00						
\sim	Delivery Date	09/30/2023			Document Level Accounting						
<u>_</u>	Requestor/Delivery Info	ormation Vendor Information C	ommodity/Accounting Balancing/Completion	on							
			•								🗄 Insert 🛛 🗖 Delete
9	Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commod	lity Text	Item Text	Add Commodity
Ø			Keynote Speake	er for Event DOL			1.00	1,500.0000			
•		▶ 10 × Per Page									
	Extended Amount	1,500.00		Тах				[Distribute		
гэ	Discount	0		Commodity Total	1,500.00						
	Additional	0.00		Document Total							
											🚼 Insert 📃 Delete
	Sequence	COA	Year	Index Fund	Orgn	Acct Prog	2 Actv		Proj	NSF Overri	NSF Suspen
L.		2						4			
	K ◀ 1 of 1 ►	► 10 V Per Page									
			%		USD						
	Extended Amount										
	Discount										
	Additional										
	Tax										
	FOAPAL Iotal										
	Document Iotal										
	Commodity Amount										
	Commonly Amount										

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

Sequence	COA	Year	Index	Fund	Orgn	Acct
	1 2	24		107173	1524	2 7083D 3
I ◀ 1 of 1 ► ►	10 ✓ Per Page					
		%			USD	
Extended Amount					1,500.00	
Discount					0.00	
Additional					0.00	
Тах					0.00	
FOAPAL Total					1,500.00	
Document Total					1,500.00	
Remaining					0.00	
Commodity Amount					0.00	

Prog	Actv	Locn	Proj
0030			

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.

ALANCING/COMPLET	ION		
Vendor	522208632 Sodexo America LLC	Currency	
	Vendor Hold	Exchange Rate	
COA	2 MU Research Corporation	Commodity Record	1
		Count	
Requestor	Brittany Bruce	Input Amount	1,500
Organization	1524 MURC COE for Addiction and Recovery	Converted Amount	
MOUNTS			
	Input	Commodity	
Approved Amount	1,500.00	1,500.00	
Discount Amount	0.00	0.00	
Additional Amount	0.00	0.00	
Tax Amount	0.00	0.00	

	- moort
	E Insert
Accounting	Status
1,500.00	BALANCED
0.00	BALANCED
0.00	BALANCED
0.00	BALANCED

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.

MU 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.

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

MALL UNIVERSIT	Office of Purchasing 125 Old Main One John Marshall Drive luntington, WV 25755-4100	Number:	PURCHASE RC- P. Please show this number of documents related	m all packages and to this order
304) 696-2598 Fax: (304) 696-3333 550484662		Ship To: ARTHU AEC 1676 TH HUNTIN Requisition #: R2	Aute: 11/06/2023 R WEISBERG FAMILY / HRD AVE GTON WV 25703 401212	APPLIED ENGINEE
ce to: Marshall University Research Co s Payable; One John Marshall Drive, Hu 25755-8100 Voice: 304-696-6203 Fax: 304-697-3	prporation; intington, WV 3861	Address all other o	correspondence to the Pure	chasing Department,
PLEASE ACKNOWLEDGET	RECEIPT OF THIS ORDER	AND GIVE DEFIN	ITE DELIVERY DATE	Extended Price
	TERMS:		DISCOUNT;	\$0.00
G AGENT: Melanie Gallaher	TERMS: (304) 696-6358		DISCOUNT: ADDL CHARGES:	\$0.00 \$0.00
3 AGENT: Melanie Gallaher D SIGNATURE: MAU	TERMS: (304) 696-6356		DISCOUNT: ADDL CHARGES: TOTAL TAXES:	\$0.00 \$0.00 \$0.00

	Unit
	Int Price
Inv	Oice
ber:	00567
mber:	00123 007 Jan15, 2015
Quantity 1 1 4 2 1 1	Line Total \$230.00 \$320.00 \$340.00 \$360.00 \$360.00 \$80.00 \$75.00
1/	

Service Agreement Invoicing Process

RESEARCH CORPORATION

Updated on 12/4/2024

When invoicing against a Purchase Order (PO), the vendor is required to complete the <u>MURC Service Agreement Invoice</u> 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.

19 Reference CORPORTING	Office of Purchasing 125 Old Main One John Marshall Drive Juntington, WV 25755-4100	Number:	PURCHASE RC- P.	on all packages and to this order
Voice: (304) 696-2598 Fax: (304) 696-3333		Ľ	Date: 11/06/2023	
		Ship To: ARTHU AEC 1676 TH HUNTIN Requisition #: R2	R WEISBERG FAMILY HIRD AVE IGTON WV 25703 401212	APPLIED ENGINEE
Invoice to: Marshall University Research C Accounts Payable; One John Marshall Drive, H 25755-8100 Voice: 304-696-6203 Fax: 304-697-	orporation; untington, WV -3861	Address all other of	correspondence to the Pur	chasing Department,
PLEASE ACKNOWLEDGE	RECEIPT OF THIS ORDE	R AND GIVE DEFIN	TTE DELIVERY DATE	
em Item Description		Units	Unit Price	Extended Price
1	TERMS:		DISCOUNT:	\$0.00
DB: JRCHASING AGENT: Melanie Galiaher	TERMS: (304) 696-6356		DISCOUNT: ADDL CHARGES:	\$0.00
1 OB: URCHASING AGENT: Melanie Gallaher UTHORIZED SIGNATURE: MALA	TERMS: (304) 696-6356		DISCOUNT: ADDL CHARGES: TOTAL TAXES:	\$0.00 \$0.00 \$0.00

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:

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

SERVICE AGREEMENT

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.

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 prov

vide 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 AMOU
Signature	Date	
Approved by:		
Project Director's Signature	Date	

UNT DUE \$

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 <u>Kristen Webb</u>, <u>Contract and Subaward Compliance Officer</u> and copying <u>Kristen Martin, Senior Finance Officer for review</u>. 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.