

Service Agreement Process

Important: This document is for those service agreements that are under the “Contractual” grant budget line that are reviewed by your [Pre-Award Grants Officer](#) (if applicable) and [Kristen Webb, Contract and Subaward Compliance Officer](#). If you have an agreement for the purchase of software, software licenses, rental/hotel agreements, equipment, or maintenance agreements, this process does not apply and will need to work with your [Grants Compliance Administrator](#).

Step 1	Determine if you are working with a Service Agreement or a Subaward. The subaward vs. contract checklist can be used to help make the determination (this is not a required document).			
Step 2	Determine if you are working with a Service Agreement with Terms or if a MURC Service Agreement is needed.			
Step 3	Work to complete the Vendor Checklist and additional documents if needed depending on the service agreement amount. Your assigned Pre-award Grants Officer is available to assist if needed. Vendor Checklist Note: If the vendor was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions.			
<table><tr><td> Agreements Between \$0 and \$24,999 • The Service Agreement • MURC Addendum, when the agreement contains terms and conditions. </td><td> Agreements Between \$25,000 and \$49,999 • Vendor Checklist is required. ◦ If the vender was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions. • Choose one of the following: ◦ 3 Quotes from different vendors ▪ The department may gather their own quotes. ▪ Select the vendor with the lowest reasonable price. ◦ Direct Award Form ▪ Used when there is only one qualified vendor (e.g., a sole-source provider or specialized expertise). • The Service Agreement • MURC Addendum, when the agreement contains terms and conditions. </td><td> Agreements \$50,000 and over • Vendor Checklist is required. ◦ If the vender was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions. • Choose one of the following: ◦ Formal Bidding Process ▪ Conducted by the MU Purchasing Office (departments are not allowed to collect their own quotes at this level). ◦ Direct Award Form ▪ Used when there is only one qualified vendor (e.g., a sole-source provider or specialized expertise). • The Service Agreement • MURC Addendum, when the agreement contains terms and conditions. </td></tr></table> Agreements over \$25,000 require Pre-Award Approval.		Agreements Between \$0 and \$24,999 • The Service Agreement • MURC Addendum, when the agreement contains terms and conditions.	Agreements Between \$25,000 and \$49,999 • Vendor Checklist is required. ◦ If the vender was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions. • Choose one of the following: ◦ 3 Quotes from different vendors ▪ The department may gather their own quotes. ▪ Select the vendor with the lowest reasonable price. ◦ Direct Award Form ▪ Used when there is only one qualified vendor (e.g., a sole-source provider or specialized expertise). • The Service Agreement • MURC Addendum, when the agreement contains terms and conditions.	Agreements \$50,000 and over • Vendor Checklist is required. ◦ If the vender was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions. • Choose one of the following: ◦ Formal Bidding Process ▪ Conducted by the MU Purchasing Office (departments are not allowed to collect their own quotes at this level). ◦ Direct Award Form ▪ Used when there is only one qualified vendor (e.g., a sole-source provider or specialized expertise). • The Service Agreement • MURC Addendum, when the agreement contains terms and conditions.
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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.			
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 vendors 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 to complete registration to get set up in the Banner payment system. See the email template to send to the vendor here. It is the PI/PD responsibility to check back in Banner to see if the vendor has been set up.			

Service Agreement Process

Step 6	Once the vendor has signed the agreement, create a Requisition using screen FPAREQN in Banner. A full list of account codes with descriptions can be found here to use when creating the requisition. You can reach out to your Grants Compliance Administrator with questions. Note: Once requisition is complete in Banner, it will need to be approved in the Banner department queue FOAUAPP.
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	Email the service agreement, required documents and vendor checklist in separate .pdfs to your Grants Officer. The Grants Officer will sign and send an approval emailed to Kristen Webb.
Step 9	Kristen Webb will review and send to Dr. Maher for final signature. <i>*If the requisition number was not created/provided, Kristen will flag for you to provide.</i>
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 PO, a copy of the fully executed agreement will be sent to the vendor, PI and/or the department administrator for their records.
If you need to check the status of a PO please email Kristen Webb.	
Next Step	Once the PO has been set up the vendor can begin invoicing. Invoicing should not take place until the Purchase Order has been created.

Key MURC Contacts for this Process:

Pre-Award Grants Officer

Each department at Marshall University has an assigned Pre-Award Grants Officer. You can locate your officer [here](#). For agreements over \$25,000, your Pre-Award Grants Officer will need to review the agreement and supporting documentation. This includes signing off on the Vendor Checklists and sending an approval email to the PI and Kristen Webb.

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.

Service Agreement Invoicing Process

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 alright 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.

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.
Assign an Invoice Number	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.
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.
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.
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 copy 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.

Banner Screen FTIIDEN

Visit Banner [here](#) and use 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**.

The screenshots illustrate the steps to search for a vendor in the Banner FTIIDEN screen. The first screenshot shows the 'Last Name' field with a green box indicating where to click. The second screenshot shows the 'Last Name' field populated with 'REBECCA' and the 'Go' button highlighted. The third screenshot shows the search results table with the vendor number (FEIN #) highlighted in the ID column.

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
1	REBECCA			Person	ID	Yes	No	No	No	No	
2	REBECCA			Person	ID	Yes	No	No	No	No	
3	REBECCA			Person	ID	Yes	No	No	No	No	
4	REBECCA			Person	ID	Yes	No	No	No	No	
5	REBECCA			Person	ID	Yes	No	No	No	No	
6	REBECCA			Person	ID	Yes	No	No	No	No	
7	REBECCA			Person	ID	Yes	No	No	No	No	
8	REBECCA			Person	ID	Yes	No	No	No	No	
9	REBECCA			Person	ID	Yes	No	No	No	No	
10	REBECCA			Person	ID	Yes	No	No	No	No	

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.

The screenshot displays the Banner FTMVEND screen. At the top, the title bar reads "Vendor Maintenance FTMVEND 9.3.22 (BanProd)". Below this, the "Vendor:" field is populated with "901" and a QR code, marked with a green circle "1". To the right, the "Corporation:" field is empty, and the "First Name:" field is populated with "Brittany". Below these, the "Last Name:" field is populated with "Bruce" and the "Middle Name:" field is populated with "Renee". A message bar at the bottom of the form area states: "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."

Below the form area, a tabbed interface is shown. The tabs are "Vendor Maintenance", "Additional Information", "Vendor Types", "Address", "E-mail", and "Taxes Collected". The "Address" tab is selected, marked with a green circle "2".

Under the "Address" tab, a list of address fields is displayed. The "Inactivate Address" checkbox is circled in red and marked with a green circle "3". The other fields are: "Area Code", "Phone Number", "Extension", "Fax Area Code", "Fax Number", "Fax Extension", "Source", "Delivery Point", "Correction Digit", "Carrier Route", and "Registration Number".

At the bottom right of the screen, it says "Record 4 of 17".

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,

Banner Screen FOAUAPP

Visit Banner [here](#) and use screen FOAUAPP in the search bar:

This screen will allow you to see all encumbrances in your approval queue.

The first screen will have your User ID prefilled just hit go. On the next screen, you will see the encumbrance(s) that need approval. Select an option and hit ok. In the top right corner, you will see a green box that says Document has your approval.

User ID: REAVIS2 Brittany Bruce Document: Next Approver: ✓

USER APPROVAL

Approve Disapprove Detail Queues

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User
	ENC	[REDACTED]			REAVIS2

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Document Approval FOAUAPP 9.3.22 (BanProd)

Type ENC

Number [REDACTED]

Submission [REDACTED]

Change Sequence [REDACTED]

DOCUMENT IS APPROVED

OK Cancel

Creating a Requisition

Visit Banner [here](#) and use screen FPAREQN in the search bar:

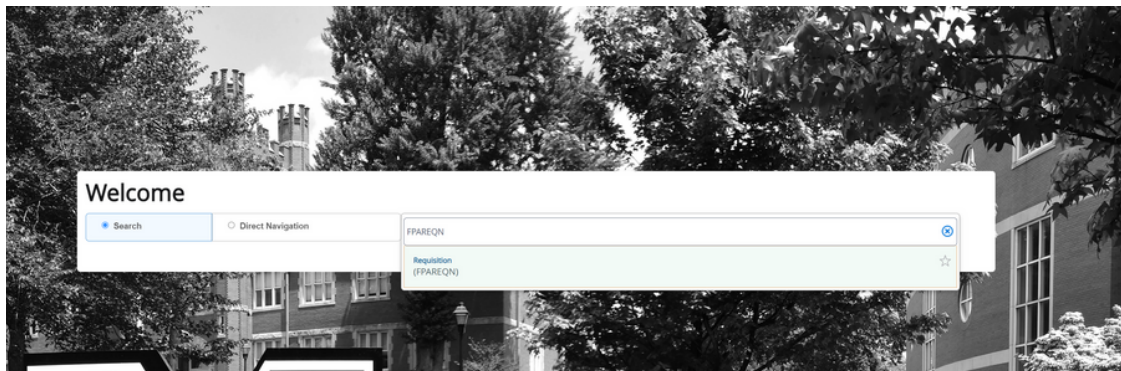
On the next screen type NEXT in the Requisition Number box. Then hit GO or use Alt Page Down.

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. for the department that is associated with the fund
6. **COA** - 2 (MU Research Corporation).
7. **Ship to** - AEC
8. **Attention to** - Preferred department administrator

Click the down arrow or hold down the Alt & Page Down buttons to continue

A screenshot of the Banner system's 'Requisition Entry' screen for screen FPAREQN. The screen is titled 'Requisition: NEXT'. It contains several sections for data entry. On the left, under 'REQUESTOR/DELIVERY INFORMATION', there are fields for Requisition, Order Date, Transaction Date, Delivery Date, Requestor, Organization, COA, Ship To, and Street Line 1. On the right, there are fields for Comments, Commodity Total, Accounting Total, and Document Level Accounting. At the bottom right, there are fields for Contact, Attention To, Building, Floor, City, State or Province, Zip or Postal Code, Nation, Area Code, Phone Number, and Extension. Numbered callouts 1 through 8 are placed over the following fields: 1. Order Date, 2. Transaction Date, 3. Delivery Date, 4. Requestor, 5. Organization, 6. COA, 7. Ship To, and 8. Attention To.

Creating a Requisition

Second Screen: Vendor Information

Fill in:

1. **Vendor** – If you do not know the vendor #, 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.
- Click the down arrow or hold down the alt & page down button to continue

Requisition: NEXT

Requestor: NEXT

Order Date: 07/19/2023

Transaction Date: 07/19/2023

Delivery Date: 09/30/2023

Comments: [Text Box]

Commodity Total: 0.00

Accounting Total: 0.00

☐ In Suspense

☐ Document Text

☒ Document Level Accounting

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

Vendor: Sodexo America LLC

Address Type: PO

Sequence: 5

Street Line 1: Sodexo Inc and Affiliates

Street Line 2: PO Box 360170

Street Line 3: [Text Box]

City: Pittsburgh

State or Province: PA

Zip or Postal Code: 15251 6170

Nation: United States Of America

Contact: John Smith

Email: smith@xyz.com

Phone Area Code: [Text Box]

Phone Number: [Text Box]

Phone Extension: [Text Box]

Fax Area Code: [Text Box]

Fax Number: [Text Box]

Fax Extension: [Text Box]

Discount: [Text Box]

Tax Group: [Text Box]

Currency: [Text Box]

Third Screen: Commodity/Accounting

Reminder: Write down the requisition number at this step.

Commodity Section:

Fill in:

1. **Description** - 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.

Requisition: R2400305

Requestor: R2400305

Order Date: 07/19/2023

Transaction Date: 07/19/2023

Delivery Date: 09/30/2023

Comments: [Text Box]

Commodity Total: 0.00

Accounting Total: 0.00

☐ In Suspense

☐ Document Text

☒ Document Level Accounting

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

Commodity: Keynote Speaker for Event

U/M: DOL

Quantity: 1.00

Unit Price: 1,500.0000

Commodity Text: [Text Box]

Item Text: [Text Box]

Add Commodity: [Button]

Extended Amount: 1,500.00

Discount: 0

Additional: 0.00

Tax: 1,500.00

Commodity Total: 1,500.00

Document Total: [Text Box]

Distribute: [Text Box]

Sequence: 2

Year: [Text Box]

Index: [Text Box]

Fund: [Text Box]

Org: [Text Box]

Acct: [Text Box]

Prog: [Text Box]

NSF Override: [Text Box]

NSF Suspense: [Text Box]

Extended Amount: [Text Box]

Discount: [Text Box]

Additional: [Text Box]

Tax: [Text Box]

FOAPAL Total: [Text Box]

Document Total: [Text Box]

Remaining: [Text Box]

Commodity Amount: [Text Box]

Creating a Requisition

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. **Org**

3. **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				
10 v 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					

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.

BALANCING/COMPLETION											
Vendor: 522208632						Currency:					
Vendor Hold:						Exchange Rate:					
COA: 2 MU Research Corporation						Commodity Record: 7					
Requestor: Brittany Bruce						Count:					
Organization: 1524						Input Amount: 1,500.00					
						Converted Amount:					
AMOUNTS											
Input		Commodity		Accounting		Status					
Approved Amount	1,500.00		1,500.00		1,500.00	BALANCED					
Discount Amount	0.00		0.00		0.00	BALANCED					
Additional Amount	0.00		0.00		0.00	BALANCED					
Tax Amount	0.00		0.00		0.00	BALANCED					

Banner Screen FGIENCD

You will now see the **Encumbrance Information** and your cursor will be in the **Encumbrance Detail** section. By clicking the right arrow on the bottom left corner of the **Encumbrance Detail** area, you can scroll through every line of the PO

Note the following Encumbrance Information:

1. **Description** – vendor name
2. **Status** – O or C indicates whether the PO is open or closed
3. **Type** – P indicates that this is a PO
4. **Date Established** – date PO was created
5. **Balance** – balance left on PO
6. **Vendor** – vendor ID and name

Note the following Encumbrance Details:

1. **Item** – a numbered list of what was ordered on the PO
2. **Sequence** – each different Fund, Orgn, Acct, and Prog (FOAP) combination on a line is considered to be a sequence
3. **Fiscal Year** – FY in which PO was created
4. **Status** – O or C, indicating open or closed
5. **Commit Indicator** – U
6. **Index, Fund, Orgn, Acct, and Prog**
7. **Encumbrance** – original amount encumbered on this line
8. **Liquidation** – total of all payments made against the line
9. **Balance** – encumbrance remaining on the line

As you scroll through the lines in the **Encumbrance Detail**, the **Transaction Activity** section reflects the activity for each line

A few Transaction Types:

- **PORD** = PO created
- **CORD** = Change to PO (a.k.a. “Change Order”)
- **INEI** = Invoice entry
- **ICEI** = Invoice cancellation
- **E090** = Encumbrance roll from the previous year

Encumbrance: P2100638 Encumbrance Period: All

Start Over

ENCUMBRANCE INFORMATION

Insert Delete Copy Filter

Description	XXXXXXXXXXXXXXXXXXXX	Date Established	08/25/2020
Status	C	Balance	0.00
Type	P	Vendor	270086421 XXXXXXXXXXXXXXX

ENCUMBRANCE DETAIL

Insert Delete Copy Filter

Item	0 Document Accounting Dis	Orgn	1510
Sequence	1	Acct	70253
Fiscal Year	21	Prog	0030
Status	C	Actv	
Commit Indicator	U	Locn	
		Proj	
COA	2	Encumbrance	3,350.00
Index		Liquidation	-3,350.00
Fund	XXXXXXXX	Balance	0.00

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Record 1 of 1

TRANSACTION ACTIVITY

Insert Delete Copy Filter

Transaction Date	Type	Document Code	Action	Transaction Amount	Remaining Balance
08/25/2020	PORD	P2100638		3,350.00	3,350.00
09/22/2020	INEI	10664943		-670.00	2,680.00
12/16/2020	INEI	10668402	T	-2,680.00	0.00
12/16/2020	ADEI	10668402	T	0.00	0.00

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Record 1 of 4