The Memorandum of Agreement (MOA) document is a fillable PDF template available at https://sites.ewu.edu/procurement/forms. These instructions follow the data entry sequence of the document & processing procedures of the MOA. Use the Tab key to move from field to field during data entry, or use your mouse to select each field. Hold your mouse over a field for additional information on that field. When completing a MOA, all fields in red are required.

1. COMPLETE AGREEMENT:

**HEADER:**

The date is the day the Agreement is initiated with the Contractor. Department is the department associated with the primary billing index. Contractor is the business or individual who will be providing services to EWU.

**I. PURPOSE OF CONTRACT:**

The scope of services provided by the Contractor is entered here. Provide as much detail as possible, including dates of specific events, audience, quantity of items, hourly rates, etc. The more detail, the better. You may use the enter key to start a new line of text and the font will automatically reduce in size to accommodate additional text if you reach the end of the field.

**II. PERIOD OF PERFORMANCE:**

The date the Contractor first begins providing services to EWU, or initiates travel (if prior to the first date of service) is entered in the first field. The date the Contractor completes providing services to EWU, or commences travel (if after the last date of service) is entered in the last field. When entering the date, the fields will automatically format the date for you.

**III. COMPENSATION:**

All data in this section should be entered only as a number. The fields will auto-format the number as currency. Enter actual values – estimates are not allowed. If you’re unsure of the actual cost, consult your Buyer in the Procurement & Contracts office for assistance. Not all fields are required – only enter information that is applicable to the agreement. The Total Compensation field is a calculated field and will automatically display the sum of all five fields in this section.

Fee for Services: Enter the compensation the Contractor will receive for performing the services specified in the Purpose of Contract section. If the Contractor is providing services for an all-inclusive fee, enter the total amount in this field only and leave the remaining fields blank.

Transportation: Enter the amount associated with commercial transportation (airfare, train, bus), car rental, cab fare, or personal vehicle mileage reimbursement. If EWU will be paying these services directly to the Vendor (airfare, etc.), please check the “EWU” box to the right of the field. DO NOT check the “EWU” box if reimbursing the Contractor for actual expenses incurred or personal vehicle mileage.

Lodging: Enter the total price (including taxes & fees) for lodging during the entire Period of Performance. If EWU will be paying these services directly to the Hotel, please check the “EWU” box to the right of the field. DO NOT check the “EWU” box if reimbursing the Contractor for actual expenses incurred. As a general rule, EWU will only cover the lodging up to and including the current Per Diem rate as approved by Washington State. Contact your Buyer for current rates.

Per Diem: Enter the total amount the Contractor may receive for meals & incidental charges. As a general rule, EWU will only cover expenses up to and including the published Per Diem rate as specified by Washington State. Contact your Buyer for current rates.
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Other: Enter the total value for parking fees, baggage fees, and any other unique charges associated with the Agreement. Provide a detail of these charges in the Purpose of Contract section. If EWU will be paying these services directly to the Vendor, please check the “EWU” box to the right of the field. DO NOT check the “EWU” box if reimbursing the Contractor for actual expenses incurred.

IX. INSURANCE: “Not applicable” is pre-selected by default and for most Agreements, insurance is not required. If you believe insurance is necessary, contact the P&C office for verification. If your Agreement does require insurance to be provided by the Contractor, select the “Required” field and attach the appropriate documentation to the MOA form when submitting to the P&C office.

CONTRACTOR INFORMATION: The Contractor’s legal information must be provided and must match that specified on the Contractor’s W9. Care of (c/o) addresses are not accepted. Be sure to specify the DBA (doing business as) name, if applicable.

DEPARTMENT INFORMATION: Please complete all fields and provide a breakdown of cost by index where applicable. This information is required to execute the MOA.

2. DEPARTMENT APPROVAL: Obtain signature(s) for expenditure approval for each index specified. The MOA will not be executed without all signatures present.

3. CONTRACTOR APPROVAL: Obtain the Contractor’s signature. The Contractor’s signature & date are required for the agreement to be valid and executed. An original, scanned, or faxed agreement from the Contractor is acceptable.

4. PROCESSING: Per WA State law & the requirements of SAAM Chapter 15.40.15, a completed and approved MOA must be executed by the P&C office before Contractor’s performance of services begin. Subject to section 4.a below, the completed MOA must be received at the P&C office (218 TAW) seven (7) business days prior to the Period of Performance start date to allow for processing and execution. If using a grant index, forward the MOA to the Grants office (210 SHW) for approval. The Grants office will forward the approved MOA to P&C for execution.

a. WA STATE EMPLOYEES: If the Contractor is an employee of another WA State agency, including any higher-education institution, the MOA must be approved by the WA State Ethics Board prior to execution by the P&C office and Contractor’s performance of services. This process can take up to thirty (30) days. The P&C office will coordinate this approval process & contact the department to obtain required information from the Contractor.

b. TAX IDENTIFICATION NUMBER: Per the terms of the MOA, the Contractor must submit directly to the P&C office a completed & signed W9 within two (2) business days of receipt of the completed MOA by the P&C office. If not received, the P&C office will contact the Contractor and request the W9. A MOA cannot be executed without a valid W9 on file.

5. CONFIRMATION: The department contact will receive a confirmation email from Banner indicating the MOA has been executed by the P&C Office. Save the attachment for your records, as it contains a file copy of the MOA generated in Banner and includes the MOA number in the upper-right corner.
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6. CONTRACTOR PAYMENT: Subject to 6.a below, upon completion of services provided, Contractor must submit an original invoice to the department contact. Faxed, emailed, or photocopied invoices will not be accepted by Accounts Payable (A/P). If needed, a contractor invoice template is available at https://sites.ewu.edu/procurement/forms.

Prior to sending the invoice to A/P, the department must provide the MOA number & billing index(es) on the Contractor invoice and obtain expenditure approval signature(s) indicating services have been rendered satisfactorily. When approved, submit the original invoice to A/P (319 SHW). Payment will be issued within thirty (30) days of receipt of the Contractor’s invoice by A/P.

a. PAYMENT ON DAY OF PERFORMANCE: If payment to Contractor is required on day of performance, and in addition to the requirements of section 6:

i. Clearly mark in red ink on the invoice “Please have check ready for pick up on the day of performance, XX/XX/XX (specify date).

ii. Submit the completed Contractor Invoice to A/P at least ten (10) business days prior to the day of performance.

iii. NOTE: Advance signature on invoice indicates that signer accepts responsibility in ensuring contractor completes the service before payment is relinquished.

7. SPECIAL CIRCUMSTANCES:

a. TOTAL COMPENSATION EXCEEDING $9,999.99: Per RCW 39.29, expenditures exceeding $9,999.99 are subject to competitive solicitation. Pre-authorization by the P&C office is required. Contact the P&C office for additional information prior to negotiating any services with the Contractor.

i. The $9,999.00 limit includes any & all charges/reimbursable expenses for travel, lodging, per diem, and/or associated expenses of the MOA.

b. CONTRACTING WITH STUDENTS: Any & all services provided by current students (actively enrolled or registered for fall quarter of the upcoming academic year) must be handled through the Student Employment office. Contact the office at stuemploy@ewu.edu or 509.359.2525.

c. CONTRACTING WITH EWU EMPLOYEES: Any & all services provided by current EWU staff or faculty must be handled through the Human Resources, Rights & Risk office. Contact the office at hr@ewu.edu or 509.359.2381.

d. NONRESIDENT ALIENS:

i. An Individual Taxpayer Identification Number (ITIN) is required to pay Contractor for services. An ITIN can be obtained by submitting a completed IRS form W-7 “Application for IRS Individual Taxpayer Identification Number” to the IRS. Allow six weeks for notification of ITIN.

ii. IRS form 8233 “Exemption from Withholding on Compensation for Independent Personal Services of a Nonresident Alien Individual” must be submitted to A/P with the Contractor’s original invoice.

iii. IRS forms 8233 and W-7 may be obtained from the Internal Revenue Service website @ www.irs.gov.

8. ASSISTANCE: Procurement & Contracts staff are always willing to assist you! Please call our office at 509.359.2253 or email contracts@ewu.edu for assistance.