CONTRACTS OFFICE
REQUIRED SUPPORTING DOCUMENTS

**Note:** All new projects submitted to the Contracts Office for review and/or approval should be sent, along with all required supporting documents (see below) to contracts.intake@wsu.edu.

**AFFILIATION / INTERNSHIP**
Definition: Affiliation / Internship agreements are agreements where one party is accepting the students (sometimes referred to as interns, trainees...) of the other party for the purpose of an internship, clinical experience, or similar. These agreements are most often used by the Colleges of Pharmacy, Nursing, Medicine, and the Schools or Programs in Nutrition and Exercise Physiology, Speech and Hearing Sciences, Human Development, though this is not an exhaustive list. The agreements we most often process are those where WSU is sending its students to another party for an internship or clinical experience. We do also process agreements where WSU is accepting students / interns from another agency, though less frequently. Money is not often exchanged in these agreements.

- Need a completed and approved Contract Review Sheet (CRS).
- Does the party you’re contracting with have a WSU ID number?
  - Yes: Provide the WSU ID number to the Contracts Office.
  - No: Submit a fully filled out W9 to the Contracts Office.
- Is money involved (to include honoraria)? Note: honoraria are prohibited from being paid via gift card. Be sure to mention if honoraria are contemplated to be paid on a PCard though, as each individual situation will need to be discussed with the Controller.
  - No: No supporting documentation required.
  - Yes: Determine the method of payment.
    - P.O.
      - Not an authorized method.
    - University Check
      - No supporting documentation required.
    - Purchase Card
      - Need approved PCard Exception (signed by PCard Program Manager).

**FACILITY USE**
Definition: Facility Use agreements are generally used for short-term rentals of buildings or meeting space. We do have “master agreements” in place, where our clients can use a facility ad hoc under the already agreed-upon terms, for a certain period of time (sometimes a few years). WSU can rent another party’s space, or another party can rent WSU’s space. These agreements can include catering and/or hotel rooms. See misc. notes below for further details on catering and lodging rules. Also see the real property section for an additional note.

- Need a completed and approved CRS.
- Does the party you’re contracting with have a WSU ID number?
  - Yes: Provide the WSU ID number to the Contracts Office.
  - No: Submit a fully filled out W9 to the Contracts Office.
- Is money involved (to include reservation fees/deposits, or having a card on file with other party)?
  - No: No supporting documentation required.
  - Yes: Determine the method of payment.
    - P.O.
      - Not an authorized method.
    - University Check
• No supporting documentation required.
  ▪ Purchase Card
    • Need approved **PCard Exception** (signed by PCard Program Manager).
  ▪ If we’re renting someone else’s facility, is it a public facility (federal, state, county, PUD, or city owned)?
    o Yes: No supporting documentation required.
    o No: Need a signed **State Administrative and Accounting Manual (SAAM) Justification**
      ▪ Is lodging included in the agreement?
        • Yes: then **SAAM** is not required.
        • No: **SAAM** is still required.

**INTERAGENCY / INTERLOCAL**
Definition: These agreements cover a wide variety of performance and scopes of work, but are generally entered into between WSU and another public entity (federal, Washington or other state agency, county, city).

  ▪ Need a completed and approved **CRS**.
  ▪ Does the party you’re contracting with have a WSU ID number?
    o Yes: Provide the **WSU ID** number to the Contracts Office.
    o No: Submit a fully filled out **W9** to the Contracts Office.
  ▪ Is money involved (to include reservation fees/deposits, revenue)?
    o No: No supporting documentation required.
    o Yes: Determine the method of payment.
      ▪ P.O.
        • Not an authorized method.
      ▪ University Check
        • No supporting documentation required.
      ▪ Purchase Card
        • Need approved **PCard Exception** (signed by PCard Program Manager).
          o Note: this is a rare method of payment for this type of agreement.

**LODGING**
Definition: Lodging agreements are for the short-term use of a hotel, but can include catering. If the agreement entails meeting space or mentions ‘facility’ (even if fees are waived) then it becomes a Facility Use agreement. See the real property section for an additional note.

  ▪ Need a completed and approved **CRS**.
  ▪ Does the party you’re contracting with have a WSU ID number?
    o Yes: Provide the **WSU ID** number to the Contracts Office.
    o No: Submit a fully filled out **W9** to the Contracts Office.
  ▪ Are University employees staying in the lodging?
    o No: No additional documentation required.
    o Yes: Are there less than five employees **AND** providing cost savings to the university?
      • No: Are they accompanying students?
        o No: Need a **Direct Bill Exception** from the Controller’s Office.
        o Yes: No supporting documentation required.
      • Yes: Are they accompanying students?
        o Yes: No supporting documentation required.
        o No: Need a **Direct Bill Exception** from the Controller’s Office.
Is money involved (to include reservation fees/deposits, direct billing, or a credit card held on file with the other party)?
  - No: No supporting documentation required.
  - Yes: Determine the method of payment.
    - P.O.
    - Not an authorized method.
    - University Check
    - No supporting documentation required.
    - Purchase Card
    - Need approved PCard Exception (signed by PCard Program Manager).

**REAL PROPERTY**
Definition: Real property (RP) is considered any agreement that entails the lease/purchase/sale of land, preferred rate lodging agreements generally in excess of one week's duration, building leases of any length, or facility use agreements in excess of one week (this is not a hard and fast rule, just a general guideline), storage unit rentals, and demonstration gardens... if you’re unsure, run it through Real Estate (RE) first to determine whether it fits under their definition of RP.

- Note: All real property agreements must go through the Real Estate Office.
- Note: A CRS is **not** required for real property agreements. Instead, a Real Property Request Form (RPRF) is required.

**REVENUE**
Definition: Revenue agreements are those agreements for which the University is performing a service, and being paid in return. This does **not** apply to cost recovery agreements (i.e. facility use agreements where we charge entrants/participants a registration/entry fee). These should generally be executed by a Service Center (i.e. SESRC, WADDL).

- Need a completed and approved CRS.
- Does the party you’re contracting with have a WSU ID number?
  - Yes: Provide the WSU ID number to the Contracts Office.
  - No: Submit a fully filled out W9 to the Contracts Office.

**SPEAKER / PERFORMER**
Definition: These agreements are generally put into place when WSU hires a speaker or performer (i.e. Mom/Dad’s Weekend entertainment, MLK Day keynote, etc.)... **not** when we allow a staff/faculty member to speak/perform at another agency. Note that speaker/performer agreements for a strictly faculty/staff audience should go through Purchasing (Personal Services). However, if it’s open to the public or students (Client Services), the Contracts Office will usually process it.

- Need a completed and approved CRS.
- Does the party you’re contracting with have a WSU ID number?
  - Yes: Provide the WSU ID number to the Contracts Office.
  - No: Submit a fully filled out W9 to the Contracts Office.
- Is money involved (to include honoraria, reservation fees, deposits, direct billing, or having a credit card on file with the other party)? Note: honoraria are prohibited from being paid via gift card. Be sure to mention if honoraria are contemplated to be paid on a PCard though, as each individual situation will need to be discussed with the Controller.
  - No: No supporting documentation required.
Yes: Determine the method of payment.
   - P.O.
     - Not an authorized method.
   - University Check
     - No supporting documentation required.
   - Purchase Card
     - Need approved PCard Exception (signed by PCard Program Manager).

MISCELLANEOUS NOTES
   - Agreements for catering alone will usually be processed by the Purchasing Office, unless the catering is directly tied to a facility use or lodging agreement processed through the Contracts Office, or if the agreement mentions a facility (even if the fees are waived).
   - Works for hire in excess of $10,000 will usually be processed by the Purchasing Office, as they require a competitive award procedure. Works for hire are loosely defined as personal or professional services.
   - Any project or agreement which entails original research, federal appropriations, or federal grants, will usually be processed by ORSO.
   - Any agreement implicating real property needs to go to the Real Estate office.