Electronic Memorandum of Agreement

eMOA/EPAF

User Guide

Saint Louis University

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Chapter 1  Introduction

The Electronic Memorandum of Agreement (eMOA) is used to establish an agreement between an individual and Saint Louis University for services provided to the University. Services could include teaching, research, administrative assignments, public service activities, or clinical service activities.

Before an eMOA is created (i.e. “initiated”), an individual, referred to herein as an “appointee,” must have a pre-existing Banner ID. The eMOA uses information from the Banner database to recognize the initiator’s assigned department, the appointee’s employee class, and the appointee’s assigned department, and will route the eMOA for approval based on those characteristics. The Office of Faculty Affairs creates Banner IDs for faculty and updates the Banner database for faculty records.

There are multiple paths an eMOA may take.

1. Appointee is new to the University or accepting an overload assignment in his or her home department – The eMOA is routed to the standard approvers: business manager, department chair, dean, faculty affairs, and provost.

2. Appointee is a current staff member – In addition to the standard approvers, the eMOA will route to the staff person’s supervisor for comment and approval. The initiator will have the ability to enter the appropriate staff supervisor email address that precedes “@slu.edu”.

3. Appointee is a faculty member in the School of Medicine – In addition to the standard approvers, the eMOA will automatically route to the school of medicine – finance, medical affairs, with the final approver the VP Medical Affairs. School of Medicine eMOA’s will not route through the provost.

4. Appointee is a faculty member accepting an assignment in a department outside of his or her home department – In addition to the standard approvers, the eMOA will route to the appointee’s home department chair for comment and approval. The initiator will have the ability to enter the appropriate home department chair email address that precedes “@slu.edu”.

5. In the rare case where an appointee is a graduate or teaching assistant - In addition to the standard approvers, the eMOA will route to the appointee’s graduate program director for comment and approval. The initiator will have the ability to enter the appropriate graduate program director email address that precedes “@slu.edu”.

6. The appointment is for a grant-funded assignment. – In addition to the standard approvers, the eMOA will route to a principal investigator level approval, and later a sponsored programs level approval. The initiator will have the ability to enter the appropriate principal investigator and sponsored programs approver, email address that precedes “@slu.edu”.

Approvers will receive a nightly e-mail notification with instructions when there is an eMOA awaiting approval. Once the eMOA has been routed through the approval queue, an e-mail will be sent to the appointee notifying him or her that an eMOA is awaiting acceptance. The appointee will be directed to Banner Self Service to accept. Lastly, the initiator and business manager will be notified by e-mail when the appointee has accepted the eMOA.
Chapter 2  Common Uses for eMOA’s

Below are guidelines describing when to use an eMOA to form an employment agreement between an individual and Saint Louis University. Other forms of written notification to establish an agreement of services can be found in Appendix A.

Electronic Memorandum of Agreement (eMOA): For a temporary assignment to include instruction, research, administration, public/clinical service; visiting or temporary faculty (ordinarily does not continue beyond one year and).

- eMOA’s for bi-weekly and PRN paid appointee’s require a manual electronic personnel action form (EPAF) to be initiated for services provided
- Does not necessarily include a salary or payment amount
- Voluntary or unpaid assignments should specify end dates so that Banner reflects the end of the assignment
Chapter 3

Initiating an eMOA

3.1 Initiator Overview

To request access to the Administrative Memorandum of Agreement menu in Banner Self Service, submit an IT Service Request via the Tools tab in the MySLU portal.

Select “Accounts and Access”, then “University Security Access Request”. Fill in your username and click enter. The rest of this section will auto populate with your information.
Scroll down to ‘Functional Areas’, check the following boxes:

- Human Resources
- Type of Request: New User
- Screen Access Type: Prod

Managers Approval Information: Fill in your managers information

Under ‘Additional INB Access’, scroll down to ‘Banner (Self-Service)’ and check ADJADMIN and HR Faculty Business Managers for the Cognos Report.

Scroll to the bottom of the page, in the ‘Additional Comments for HR Access Request’ box, note that you are requesting access to the “Administrative Memorandum of Agreement Menu”, and “Access to eMOA reports folder in Cognos: “Public Folders > Reports > Human Resources > Faculty > Electronic Memorandum of Agreement System (eMOA)”.

For more information on eMOA reports, see Chapter 11, Reports.

Once the form is submitted, the security access request is routed to Human Resources Information Systems (HRIS) for approval. Please note that the security access must be requested by the unit Business Manager or Supervisor for the access to be approved. An individual may not request access for him/herself. Once the Business Manager or Supervisor submits the form, HRIS will approve the access request and route it to ITS for activation. Access will automatically terminate when an employee separates from the University. EMOA Initiator access remains intact until and unless a Business Manager or Supervisor subsequently revises or terminates an employee’s access. Transferring employment from one unit to another will not automatically update that employee’s access. The Business Manager or Supervisor must submit a revision to that employee’s access via the ITS Service Request tool. You can review the security access for your unit by
logging into the WebFOCUS Dashboard on the MySLU portal. Selecting the Logical Access folder, and WebFOCUS Reports subfolder and selecting the Logical Access Super Report option. It is recommended that each Business Manager or Supervisor review employee security access when there is a personnel change within that unit, or minimally, every six months.

An initiator can begin an eMOA once the appointee has a BID and is set up as faculty in Banner. To obtain a BID, a Faculty Information Form must be completed in its entirety and sent to the Office of Faculty Affairs.

The eMOA is the employment contract and requires multiple layers of approval. Depending on the hire, manual EPAF's will be necessary.

3.2 Selecting an Appointee and Term

From the Employee menu in Banner Self Service, choose the Administrative Memorandum of Agreement Menu.
Click the Initiate Memorandum of Agreement
Next, select the appointee by entering his or her Banner ID, or first and last name and click Submit.

Verify that the appointee is correct, and if so, select the term for which you are preparing an eMOA and click Submit. If the appointed is incorrect, click Return to Select.
The Memorandum of Agreement: Page 1 screen displays the appointee’s information in the heading. The remainder of the page will include information pertaining to the term’s assignment.

1. The Part of Term is a further breakdown of the Term identified in the header, or could simply be “Full” Term. Choose the part of term that most closely reflects the assignment.

2. Choose the department for which the services will be provided.

3. Select the Rank granted to the appointee. The appointee’s most current rank will appear in the top box next to “Current Rank”.

4. The Primary Activity is ordinarily Instruction, Research, Administration, or Clinical/Public.

5. Overload: Does the appointee have a full time position at the university during the time of this assignment? If so, answer Yes.

6. Contract start and end dates will auto-fill based on the Part of Term selected. Dates are editable by the initiator. If the appointment is for a shorter time than the part of term you chose, list the actual dates of the appointment. Contract end-date should be the last day grades are due. You will need to manually change the end date. The factors and pays are based on the contract dates.

7. Enter the total salary the appointee will earn for this assignment. If this is a PRN (SOM only), list the amount either per hour, month, term, semester, or year.

8. Enter the correct full-time equivalent (FTE). This will automatically figure the hours per pay and factors and pays for the EPAF. It will also acknowledge the dates as the first and the last day of the month for all non-school of medicine appointees.

9. PRN (for School of Medicine only). Check this box if faculty will be PRN. A manual EPAF is required.

10. If this is a PRN (SOM only), add the description as to how the appointee will be paid, i.e. per hour, per month, per term, etc. This should coincide with the salary listed. This will be viewable on the eMOA.
3.4 Completing Page 2

Memorandum of Agreement: Page 2 will display fields based on the Primary Activity selected on Page 1.

Additionally, approvers’ will need to be entered at the bottom of Page 2. If the initiator indicated on Page 1 that the assignment would be grant-funded, then the principal investigator and sponsored programs contact will need to be entered. Additional approver fields may also need to be entered, as applicable (e.g. home department chair, medical affairs, etc.). Enter the email address that precedes “@slu.edu” in the appropriate fields.

![Image of the Memorandum of Agreement form]

Scenario A: Instruction

- Enter the position number the appointee will occupy. The position description, org code, fund code, account code, and percent will auto-fill from the Banner database. The percent will auto-fill at 100% unless additional funds are entered, at which point you can adjust the percent which will adjust the $ amount. These fields are editable by the initiator and business manager only.
- Enter the CRN for the course(s) the appointee will teach. The subject, course, section and course title will auto-fill. This is required for all courses with a CRN.
- If the appointee will perform additional duties outside of instruction, describe those duties in the first text box using complete sentences. This language will appear in the agreement, viewable by the appointee.
- The “Additional Comments” box is for the initiator to add additional information for the approvers. These comments will not be viewable by the appointee when he or she views the eMOA.
- Enter the approvers’ email address that precedes ”@slu.edu” and click Save and Continue to proceed.
Scenario B: Administration

- Enter the position number the appointee will occupy. The position description, org code, fund code, account code, and percent will auto-fill from the Banner database. The percent will auto-fill at 100% unless another fund is entered. You can adjust the percent which will adjust the $ amount. These fields are editable by the initiator and business manager only.
- Enter the details of the administrative assignment using complete sentences. This language will appear in the agreement, viewable by the appointee.
- The “Additional Comments” box is for the initiator to add additional information for the approvers. These comments will not be viewable by the appointee when he or she views the eMOA.
- Enter the approvers’ email address that precedes “@slu.edu” and click Save and Continue to proceed.

Scenario C: Research

- Enter the position number the appointee will occupy. The position description, org code, fund code, account code, and percent will auto-fill from the Banner database. The percent will auto-fill at 100% unless another fund is entered. You can adjust the percent which will adjust the $ amount. These fields are editable by the initiator and business manager only.
- Enter the details of the research assignment using complete sentences. This language will appear in the agreement, viewable by the appointee.
- The “Additional Comments” box is for the initiator to add additional information for the approvers. These comments will not be viewable by the appointee when he or she views the eMOA.
- Enter the approvers’ email address that precedes “@slu.edu” and click Save and Continue to proceed.
### Scenario D: Public/Clinical Service

- Enter the position number the appointee will occupy. The position description, org code, fund code, account code, and percent will auto-fill from the Banner database. The percent will auto-fill at 100% unless another fund is entered. You can adjust the percent which will adjust the $ amount. These fields are editable by the initiator and business manager only. If there is no salary (e.g. for voluntary faculty appointments), entering the position number is optional.

- Enter the details of the public/clinical service assignment using complete sentences. This language will appear in the agreement, viewable by the appointee.

- The “Additional Comments” box is for the initiator to add additional information for the approvers. These comments will not be viewable by the appointee when he or she views the eMOA.

- Enter the approvers’ email address that precedes “@slu.edu” and click Save and Continue to proceed.

### Scenario E: Other

- Enter the position number the appointee will occupy. The position description, org code, fund code, account code, and percent will auto-fill from the Banner database. The percent will auto-fill at 100% unless another fund is entered. You can adjust the percent which will adjust the dollar amount. These fields are editable by the initiator and business manager only.

- Enter the details of the assignment using complete sentences. This language will appear in the agreement, viewable by the appointee. *Be very specific in the description.*

- The “Additional Comments” box is for the initiator to add additional information for the approvers. These comments will not be viewable by the appointee when he or she views the eMOA.

- Enter the approvers’ email address that precedes “@slu.edu” and click Save and Continue to proceed.
3.5 Previewing, Verifying and Submitting

After you click Save and Continue on Page 2, the eMOA will appear in a preview format. This format reflects what the approvers and appointee will see. Verify all data is accurate and no information is missing on the eMOA.

To make changes, click Previous Page to edit Page 2 of the eMOA, click Previous Page again to edit Page 1.

3.6 Tracking Number

Once the eMOA has been submitted, you will receive a confirmation message and tracking number. The tracking number is unique to each eMOA.
3.7 Add, Remove or View Supporting Documents of an eMOA

The initiator can click “Add, Remove or View Supporting Documentation for this Appointment” to upload additional information about the appointee’s qualifications, financial arrangements, details related to the assignment, or other relevant documents.

If the eMOA is for a Bi-Weekly employee or PRN (SOM only), then a manual EPAF is required to be initiated. The eMOA tracking number should be noted in the Comment box of the EPAF (see EPAF box below). The tracking number links the two processes.
Chapter 4  Revising an eMOA

4.1 Revision Overview

The initiator has the option to revise the content of an eMOA as long as the appointee has not yet accepted the agreement. Common revisions may include a change of part of term, a change of salary, a change of duties, or a change of approver. A revision can be one change, or many changes. **An initiator cannot revise an eMOA to make changes to the appointee or term.** To change an appointee or term, the initiator must cancel the eMOA and initiate a new eMOA. See Chapter 7, Cancelling an eMOA.

4.2 Selecting an eMOA to Revise

To revise an eMOA, visit the Administrative Memorandum of Agreement Menu, under the Employee tab, in Banner Self Service. Click Revise Memorandum of Agreement.

![Image of Memorandum of Agreement Menu]

The Revise Memorandum of Agreement page will display a list of eMOA’s that you, or someone in your department, initiated which are pending approval, pending acceptance, or returned for correction. See Chapter 6 for more on Return for Correction.

<table>
<thead>
<tr>
<th>Tracking Number</th>
<th>Appointed</th>
<th>Term/AY/YY</th>
<th>Part of Term</th>
<th>Dept/Coll/Center</th>
<th>Primary Activity</th>
<th>Salary</th>
<th>Status</th>
<th>Initiated by Days Pending</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>7452</td>
<td>Katherine Paulin</td>
<td>Summer 2012</td>
<td>Interim</td>
<td>Enrollmnt &amp; Retention Mog</td>
<td>Instruction</td>
<td>$3,000</td>
<td>Approved</td>
<td>N</td>
<td>0</td>
</tr>
<tr>
<td>180036</td>
<td>James Carroll</td>
<td>Fall 2016</td>
<td>Full Term</td>
<td>Parlia Coll of Eng &amp; Tech</td>
<td>Instruction</td>
<td>$7,500</td>
<td>Pending rejected</td>
<td>28</td>
<td>N</td>
</tr>
<tr>
<td>180037</td>
<td>Erin Chambers</td>
<td>Fall 2016</td>
<td>Full Term</td>
<td>Computer Science</td>
<td>Research</td>
<td>$1,000</td>
<td>Approved rejected</td>
<td>0</td>
<td>N</td>
</tr>
<tr>
<td>180038</td>
<td>Terry Adelman</td>
<td>Fall 2016</td>
<td>10 Week Session</td>
<td>School of Law</td>
<td>Instruction</td>
<td>$0</td>
<td>Pending rejected</td>
<td>58</td>
<td>N</td>
</tr>
<tr>
<td>180040</td>
<td>Channele Austin</td>
<td>2016-2017</td>
<td>ACVR</td>
<td>Psychology</td>
<td>Public/Clinical Service</td>
<td>$5,000</td>
<td>Approved rejected</td>
<td>0</td>
<td>N</td>
</tr>
<tr>
<td>180042</td>
<td>Patrick Cousins</td>
<td>2016-2017</td>
<td>PCVR</td>
<td>Theological Studies</td>
<td>Research</td>
<td>$1,500</td>
<td>Approved rejected</td>
<td>0</td>
<td>N</td>
</tr>
</tbody>
</table>

The list displays important information about the appointment, as well as the number of days pending since initiation and a “Y” (yes) or “N” (no) value indicating if there are supporting documents accompanying the eMOA. Click the “Y” to view, add, or remove documents. Click the “N” to add documents.

Click the tracking number of the eMOA that requires revision.
4.3 Reviewing Memorandum of Agreement Needing Revision

The eMOA will appear in a preview format.

To proceed with revising, click Continue to Revise. To exit, click Previous Page.
4.4 Revising Page 1

- Page 1 displays the same as in the initiation process.
- The initiator can revise any field(s) displayed below the eMOA Contract History.
- Click Save and Continue to make changes to Page 2 or to proceed to Submit.

4.5 Revising Page 2

- The initiation date now reads Revision Date in the heading, the eMOA type is Revised, and the date will reflect the date you revised and submit the eMOA.
- When revising the salary on page 1, you will notice the salary amount will automatically update on page 2.
- The previous comments that were in the Additional Comments box to approvers are now stored in date order under Previous Comments.
- If changing grant funding, you add/delete the PI and Sponsored Program approvers at bottom of page.
- Click Save and Continue to proceed to Submit, or edit and click Save and Continue.
The eMOA displays in preview format. Verify all data is accurate and no information is missing on the eMOA. Click Submit to begin re-routing for approval, beginning with the business manager.

The verification page will display the same tracking number for your reference.
Chapter 5 Approving an eMOA

5.1 Approver Overview

The eMOA will take one of several possible approval routes, depending on the combination of appointee employee class (e-class), the appointing department, and whether the appointment is grant-funded. The following will provide a brief description of when each approver will receive an eMOA in his or her queue, and the information each approver is responsible for providing.

An approver will be notified by e-mail (sent nightly) that there is an eMOA in his/her queue to approve. To approve an eMOA, click on the Employee tab in Banner Self Service, and scroll to find Approve Memorandum of Agreement.

Click Approve Memorandum of Agreement. A list of eMOA’s awaiting your approval will be displayed. You can use the Sort Contracts by: to change the order that the eMOA’s are displayed.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Term</th>
<th>Faculty</th>
<th>Primary Activity</th>
<th>Status</th>
<th>Initiated By</th>
<th>Days Pending</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Carroll</td>
<td>Fall 2016</td>
<td>Full Term</td>
<td>Parks, Ect., Art &amp; Tech</td>
<td>$750</td>
<td>Pending reg</td>
<td>59</td>
<td>N</td>
</tr>
<tr>
<td>Richard Amielang</td>
<td>2016-2017</td>
<td>ACYR</td>
<td>School of Law</td>
<td>$25</td>
<td>Pending reg</td>
<td>49</td>
<td>N</td>
</tr>
<tr>
<td>Michael Brown</td>
<td>2016-2017</td>
<td>ACYR</td>
<td>Pathology</td>
<td>$0</td>
<td>Pending reg</td>
<td>45</td>
<td>N</td>
</tr>
<tr>
<td>Tony Adalina</td>
<td>2016-2017</td>
<td>ACYR</td>
<td>School of Law</td>
<td>$0</td>
<td>Pending reg</td>
<td>30</td>
<td>N</td>
</tr>
<tr>
<td>Rene Davengt</td>
<td>Spring 2017</td>
<td>Physics</td>
<td>Research</td>
<td>$30,000</td>
<td>Pending reg</td>
<td>30</td>
<td>N</td>
</tr>
<tr>
<td>Thelma Boyd</td>
<td>Fall 2016</td>
<td>EMIB</td>
<td>Accounting</td>
<td>$500</td>
<td>Pending reg</td>
<td>28</td>
<td>N</td>
</tr>
<tr>
<td>Brandon McCay</td>
<td>Fall 2016</td>
<td>Graduate Business</td>
<td>Language, Literature &amp; Culture</td>
<td>$10,000</td>
<td>Pending reg</td>
<td>28</td>
<td>N</td>
</tr>
<tr>
<td>Scott Duellman</td>
<td>Fall 2016</td>
<td>MBA</td>
<td>Interdisciplinary</td>
<td>$8,400</td>
<td>Pending reg</td>
<td>28</td>
<td>N</td>
</tr>
<tr>
<td>Christine Rogers</td>
<td>Fall 2016</td>
<td>Full Term</td>
<td>Accounting</td>
<td>$100,000</td>
<td>Pending reg</td>
<td>27</td>
<td>N</td>
</tr>
</tbody>
</table>
5.2 Principal Investigator Approver

If the eMOA is for a grant-funded assignment, the principal investigator for the grant will be the first approver.

In many cases, the principal investigator is the same person as the appointee. In this case, the appointee will need to approve the eMOA using the eMOA “Approve Memorandum of Agreement” link in Banner Self Service as well as eventually return to Self Service to accept the eMOA using the “Accept Memorandum of Agreement” link when the eMOA finally reaches the appointee for acceptance.

5.3 Business Manager Approver

The business manager is always the first approver after the eMOA is submitted by the initiator—unless the eMOA is for a grant-funded assignment.
The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator. The financial information follows the contract terms.

The business manager should review the position number, fund and account information (and edit if necessary). It is the responsibility of the business manager to confirm funding is available in the listed account(s) before approving the eMOA.

Approver Comments are optional, unless the business manager is returning for correction or disapproving. See Chapter 6 for more information on Return for Correction or Disapprove. These comments will not be seen by the appointee at any time.

Choose Approve and click Submit to route the eMOA to the next approver.
5.4 Home Department Chair Approver

If the appointee is a full time faculty member and the eMOA was initiated by a department other than his or her home department, the appointee’s home department chair will be the next approver.

The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The middle layer of the heading displays the position number and financial information. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator.

The home department chair can review comments from the initiator and business manager directly following the contract language.

The appointee must continue to devote 100% effort to his or her primary position. The conflict of commitment statement gives the home department chair an opportunity to explain potential conflicts regarding the assignment discussed with the appointee. The appointee will review the conflict of commitment statement before accepting the eMOA.

Approver Comments are optional, unless the department chair is returning for correction or disapproving. These comments will not be seen by the appointee at any time. Choose Approve and click Submit to route the eMOA to the next approver. The next approver will be the initiating department chair.
5.5 Staff Supervisor Approver

If the appointee is a full time staff member, the appointee’s supervisor for his/her primary position will be the next approver.

The staff supervisor will check to make sure ‘overload’ is checked and will review comments from the initiator and business manager directly following the contract language.

The appointee must continue to devote 100% effort to his/her primary position. The conflict of commitment statement gives the staff supervisor an opportunity to explain potential conflicts regarding the assignment discussed with the appointee. The appointee will review the conflict of commitment statement before accepting the eMOA.

Approver Comments are optional, unless the staff supervisor is returning for correction or disapproving. These comments will not be seen by the appointee at any time. Choose Approve and click Submit to route the eMOA to the next approver. The next approver will be the initiating department chair.

The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The middle layer of the heading displays the position number and financial information only if it is a monthly-paid employee. Bi-weekly and PRN employees will not have financial information present on the eMOA as a manual EPAF is required. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator.

---

Approve Memorandum of Agreement

**Staff Supervisor**

**Appointee:**

**Tracking Number:** 18131  **Primary Activity:** Instruction

**Revision Date:** 12/30/2016  **Overload:** Yes

**MOA Type:** Revised  **Term/AY/YS:** Spring 2017

**eMOA Contract History**

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is appointed for Spring 2017 for the Full term in the Department of Aerospace Studies at Saint Louis University, for the period from 01/17/2017 to 05/16/2017. The total salary will be $200.00 per semester. The rank will be Adjunct Instructor.

You are assigned to teach the following course(s):

- CS3 - Sub Code Course Section Course Title
  - 20702 AAB 0100 91 The Air Force Today

The appointee does not have the graduate faculty status needed to teach the course(s).

The duties of this appointment include: will teach this course over his lunch hour and will work an additional hour in the evenings on MWF.

The appointee will enjoy all privileges granted his/her position by the University as set forth in The Faculty Manual and other written University, college,
5.6 Graduate Program Director Approver

In rare cases, if the appointee is a graduate assistant or teaching assistant, the appointee’s graduate program director, or direct supervisor, will be the next approver.

The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The middle layer of the heading displays the position number and financial information. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator.

The graduate program director can review comments from the initiator and business manager directly following the contract language.

The appointee must continue to devote 100% effort to the graduate or teaching assistantship. The conflict of commitment statement gives the graduate program director an opportunity to explain potential conflicts regarding the assignment discussed with the appointee. The appointee will review the conflict of commitment statement before accepting the eMOA.

Approver Comments are optional, unless the graduate program director is returning for correction or disapproving. These comments will not be seen by the appointee at any time. Choose Approve and click Submit to route the eMOA to the next approver. The next approver will be the initiating department chair.

Note: In accordance with the terms of the graduate assistantship contracts, only part-time graduate assistants may be allowed to accept an adjunct assignment during the period of their contracted assistantship. However, part-time graduate assistants who accept adjunct appointments will forfeit their FICA tax exempt status on all of their paid assignments with the University.
5.7 Department Chair Approver

The department chair will always review an eMOA for appointees performing duties in his or her department. The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The middle layer of the heading displays the position number and financial information. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator.

The department chair reviews the eMOA and any comments entered by all previous initiators. Approver Comments are optional, unless the department chair is returning for correction or disapproving. These comments will not be seen by the appointee at any time. Choose Approve and click Submit to route the eMOA to the next approver. The next approver will be the dean.
5.8 School of Medicine – Finance Approver

If the appointee’s home organization is within the School of Medicine or Centers that report to the VP, Medical Affairs, the eMOA will automatically route to HSC – Finance who will review the eMOA and any comments entered by the previous approvers.

Approver Comments are optional, unless the HSC – Finance is returning for correction or disapproving. These comments will not be seen by the appointee at any time.

Choose Approve and click Submit. The eMOA will automatically route to Medical Affairs.

5.9 Medical Affairs Approver

Medical Affairs approver receives every School of Medicine eMOA and reviews data for accuracy, the appointee history for consistency, and determines if the eMOA was used appropriately. Medical Affairs will also review any comments entered by previous approvers.

Approver Comments are optional, unless the Medical Affairs is returning for correction or disapproving. These comments will not be seen by the appointee at any time.

Choose Approve and click Submit to route the eMOA to the next approver, Academic Affairs.
5.10 VP Medical Affairs Approver

The VP of Medical Affairs will be the final approver for all School of Medicine eMOA’s and the Centers that report to the Vice President, Medical Affairs.

The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The middle layer of the heading displays the position number and financial information. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator.

The vice president of medical affairs will review the eMOA and any comments entered by the previous approvers.

Approver Comments are optional, unless the vice president of medical affairs is returning for correction or disapproving. These comments will not be seen by the appointee at any time. If the vice president is agreeable, he/she will approve the eMOA and click Submit to route the eMOA to the appointee for acceptance.
5.11 Dean Approver

The dean will always review an eMOA for appointees performing duties in his or her college, school, or center.

The heading displays information about the appointee on the left column, and information specific to the eMOA in the middle and right columns. The middle layer of the heading displays the position number and financial information. The bottom layer of the heading displays the eMOA history, if applicable. The standard contract language appears with bolded text reflecting information entered by the initiator.

The dean reviews the eMOA and any comments entered by the initiator and previous approvers.

Approver Comments are optional, unless the dean is returning for correction or disapproving. These comments will not be seen by the appointee at any time. Choose Approve and click Submit to route the eMOA to the next approver. The next approver will be faculty affairs.
5.12 Sponsored Programs Approver

If the eMOA is for a grant-funded appointment, the appropriate sponsored programs contact will serve as an additional approver immediately after the dean-level approver. The sponsored programs approver will review the eMOA and any attachments to ensure compliance with University policies and procedures, governmental and agency rules and regulations, and cost accounting standards.

Approver Comments are optional, unless sponsored programs is returning for correction or disapproving. These comments will not be seen by the appointee at any time. Choose Approve and click Submit to route the eMOA to the next approver. The next approver will be faculty affairs.

5.13 Office of Faculty Affairs Approver

The eMOA will automatically route to the Office of Faculty Affairs. The office of faculty affairs approver receives every eMOA and reviews data for accuracy, the appointee history for consistency, and determines if the eMOA was used appropriately. Faculty Affairs will also determine if the assignment should be "secondary". For new appointees, the faculty affairs approver will also confirm whether the required criminal background check has been completed and transcripts of the appointee's highest degree is on file. The office of faculty affairs approver records the faculty rank and related dates in Banner. The next approver will be the associate provost.
5.14 Associate Provost Approver

The eMOA will automatically route to the associate provost for approval. The associate provost will review the eMOA and any comments entered by the initiator and previous approvers.

Approver Comments are optional, unless the associate provost is returning for correction or disapproving. These comments will not be seen by the appointee at any time. If the associate provost is agreeable, he/she will approve and click Submit to route the eMOA to the appointee for acceptance.
Chapter 6 Returning for Correction and Disapproving

6.1 Return for Correction Overview

An approver has the option to return the eMOA to the initiator for correction should he or she want to see updated or additional information displayed in the agreement or to make a correction.

6.2 Selecting an eMOA to Return for Correction

An approver will select an eMOA as if he or she plans to approve. At the bottom of the eMOA, the approver will have the option to Approve, Disapprove or Return for Correction. If the Return for Correction is selected, comments must be entered describing the requested corrections. Click Submit.

A prompt will appear asking if you are sure you want to return the contract for correction. Click Yes to proceed. The eMOA will then route to the initiator. The initiator will receive an e-mail notification that an eMOA has been returned. The email will contain the comments describing the requested corrections the approver entered.

6.3 Editing an eMOA that was Returned for Correction

The initiator will receive an e-mail notification that an eMOA has been returned for correction. The initiator should visit the Revise a Memorandum of Agreement menu to select the appropriate eMOA. eMOA’s that have been returned for correction will show a status of “Returned.”
Click the tracking number for the eMOA that has been returned for correction. The first page that will appear is a preview of the agreement with approver comments. Scroll to see the approver comments and reason the eMOA was returned for correction. Note: Once you proceed, the eMOA will move to a “Revised” status. All prior approver comments entered have been saved and will remain viewable.

Proceed with revising the eMOA (see 4.3 for details).

6.4 Disapprove Overview

An approver has the option to disapprove an eMOA should he or she disagree overall with extending the agreement. If an eMOA is disapproved, there is no option to revise. The eMOA ends with disapproval.
6.5 Selecting an eMOA to Disapprove

An approver will select an eMOA as if he or she plans to approve. At the bottom of the eMOA, the approver will have the option to Approve, Disapprove or Return for Correction. If Disapprove is selected, comments must be entered describing the reason for ending the eMOA. Click Submit.

A prompt will appear asking if you are sure you want to disapprove the contract. The initiator will receive an e-mail notification that an eMOA has been disapproved, and the process will end.

Chapter 7  Cancelling an eMOA

7.1 Cancellation Overview

If an eMOA is pending approval or acceptance by the appointee, it will be available for cancellation. eMOA’s that have been accepted by the appointee or returned for correction will only be available in the Cancel Memorandum of Agreement menu for 30 days from the end date of the contract.

An eMOA may be cancelled as a result of a course cancellation due to low enrollment or if the appointee is no longer available to perform the duties described in the eMOA. Many eMOA changes can be accommodated via the revise menu; however, should you need to change the requested Term, you must first cancel the eMOA in progress. Outside of these occasions, there should be few events that require cancellation.

Should a course be cancelled within 14 working days of the proposed start date, the Adjunct faculty member with an e-class of 20, may be eligible to receive 10% of the agreed upon salary up to a maximum amount of $500, per University policy. A manual EPAF must be completed for this pay. When initiating an EPAF for this reason, you must enter the reason in the comment box of the EPAF and reference eMOA number that was canceled.
7.2 Selecting an eMOA to Cancel

From the Employee menu in Banner Self Service, choose the Administrative Memorandum of Agreement Menu. Click Cancel Memorandum of Agreement.

A list of eMOA’s that you have initiated, or were initiated by a colleague in your department, will appear in the list. Click the tracking number for the eMOA to cancel.
7.3 Choosing a Cancellation Reason

The eMOA will display in a non-editable format.

Next, you’ll choose from a drop down menu at the bottom of the page the reason for the eMOA cancellation. The options are:

- Low Enrollment – course cancelled because enrollment did not meet minimum number of students
- Appointee No Longer Available – appointee is not able to meet the requirements of the agreement
- Memorandum of Agreement Needed for a Different Term – the eMOA was initiated for an incorrect term and should be recreated for the correct term
- Other – (should not be used regularly)

After selecting the cancellation reason, click Submit. A prompt will appear asking if you are sure you want to cancel the contract.

Click Yes to cancel. Click No to return to the Cancel Memorandum of Agreement menu.

Faculty Affairs will investigate the reason for a cancellation and pursue the matter with the office of the general counsel, if necessary. Once a decision is reached, the office of faculty affairs will move the eMOA to an “active” status, or “cancelled” status. The initiator will be notified by e-mail, and the appointee may receive a letter from the office of the general counsel. These instances will be infrequent, and handled on a case by case basis.
Chapter 8  
Viewing an eMOA (Completed or Pending Approval)

8.1 Viewing an eMOA Overview

An initiator can view an eMOA up to 30 days after the end date on the contract. After the eMOA is accepted by the appointee, an initiator can view the eMOA with all approver comments. The initiator can also view, print, or save an electronic copy of the official eMOA, for the department’s records.

After the 30 days following the end date on the eMOA, the initiator can still run a report through Cognos which summarizes the terms of the eMOA, but it will no longer be viewable in Banner Self Service.

8.2 Selecting an eMOA to View

From the Employee menu in Banner Self Service, choose the Administrative Memorandum of Agreement Menu. Click View Memorandum of Agreement.

A list of eMOA’s that you have initiated, or were initiated by a colleague in your department, will appear in the list. You are able to see pending, returned, approved, accepted and declined eMOA’s. Select the tracking number for the eMOA you wish to view.
The eMOA will appear in preview format, including all of the approver comments entered thus far.

At the bottom of the eMOA is a button called “Print View.” If the eMOA has been accepted by the appointee, you may choose to print or save this version for your records.

The “print view” version will include approver comments.
Chapter 9  Accepting an eMOA

9.1 Accept Overview

After all of the necessary approvers have approved the eMOA, the appointee will receive an e-mail notification that there is an eMOA awaiting approval. The appointee will be directed to Banner Self Service. The appointee will choose the Employee tab, and click the link for Accept Memorandum of Agreement.

Once the appointee accepts the eMOA, an EPAF will automatically generate in the HRIS queue.

NOTE: BI-WEEKLY and PRN eMOA’s will be required to initiate a manual EPAF.

The eMOA will appear in Preview format, and will include Conflict of Commitment comments, but no Approver Comments.
The appointee will accept or decline the agreement.

The appointee has the option to print or save their eMOA. The initiator will be notified by e-mail once the appointee submits the eMOA with a decision.
Chapter 10  eMOA Reports

Five eMOA reports are available in Cognos:

1) eMOA Super Status Report – Includes every field on the eMOA, including comments.

2) eMOA Faculty Activity Report – Includes basic eMOA information in addition to Primary Activity and all associated fields, including course information.

3) eMOA Financial Activity Report – Includes basic eMOA information in addition to the fund and account details.

4) eMOA Status Report – Includes basic eMOA information and the current location and approval status.

5) Appointee History Report – Includes basic eMOA information for all eMOA’s initiated on behalf of a specific appointee (Banner ID must be entered to run the report), in addition to the Primary Activity and all associated fields, including course information, as well as the fund and account details.

Access to Cognos reports was requested at the time of requesting eMOA access through the University Security Access Request system. See section 3.1.
Appendix A  Other forms of Agreement

Sometimes it is appropriate to use an appointment letter, Standard Services Agreement or other form of written notification to establish an agreement for services provided to the University. These options are explained below.

**Appointment Letter:** Ordinarily, for a part time or full time faculty presumed to continue with an annual renewal notice from the Vice President for Academic Affairs. Some post-doctoral fellow appointments will be granted via an appointment letter (e.g. those for which the PeopleAdmin system has been used to recruit a post-doctoral fellow, or for those to whom start-up funding has been committed)

**Memorandum of Agreement (paper):** Used only for post-doctoral fellows. Since the terms and conditions of a post-doctoral fellowship agreement differ from the standard terms on the eMOA, eMOA’s should not be used to appoint someone to a primary post-doctoral fellowship position. However, a post-doctoral fellow receiving additional funding (e.g. from a grant-related assignment) may be appointed to an additional assignment using an eMOA. A modified post-doctoral fellow (paper) MOA template is available by request from the Office of Faculty Affairs.

**Standard Service Agreement (SSA)/Honorarium:** Used for single service or limited service experience, for example, guest lecturer or vendors, and for when rank is not necessary. *An individual cannot receive both an eMOA and SSA in the same tax year.*
Appendix B  Glossary

**Accepted**- eMOA status when all approvers have approved and the appointee has accepted.

**Appointee**- The individual providing services to Saint Louis University and with whom the University is entering into a contract.

**Approve**- To be in agreement with all terms of the Memorandum of Agreement and support the appointee choice and services to be provided.

**Approved**- eMOA status when all approvers have approved the eMOA, but the appointee has not yet accepted or declined.

**Approver**- An individual who has a stake in the agreement and will either support or oppose.

**Business Manager**- The financial manager, designated by the initiator, selected to verify position, fund and account information. This individual will certify the proper funding is available to satisfy the terms of the agreement.

**Cancel**- To permanently remove a Memorandum of Agreement from the approval queue either before the appointee accepts, or after the appointee accepts, but more than two weeks before the start of the assignment. Usually a cancel results from low enrollment or appointee availability.

**Cancelled**- eMOA status when an initiator chooses to nullify the eMOA; it cannot be retrieved.

**Days Pending**- Displayed when viewing a list of eMOA’s. Represents the number of days since the eMOA was submitted by the initiator. Does not reflect the number of days pending in the most recent approver’s queue.
**Disapproved**- eMOA status when an approver chooses not to support the contract moving forward.

**Graduate Program Director**- The person primarily responsible for the assistantship activities of the appointee.

**Home Department**- The department in which the appointee’s primary job is linked.

**Home Department Chair**- The department chair of the appointee’s home department.

**Initiator**- The individual who completes the Memorandum of Agreement form, usually in the department that is requesting services to be provided.

**New Hire**- A person who has not previously worked at Saint Louis University, or has not been paid by Saint Louis University for 12 months or more. In the case of voluntary faculty, a person who has not had an active assignment in the Banner system for 12 months or more.

**Overload**- An assignment that is in addition to a full time primary job.

**Pending**- eMOA status when contract is routing through the approver queue.

**Staff Supervisor**- The person primarily responsible for the appointee’s primary job responsibilities.

**Email**- The portion of the Saint Louis University e-mail address that precedes the @slu.edu
Appendix B  
Notification E-mail Samples

Appointees, approvers and initiators will be notified by e-mail at certain points throughout the approval process. Each of the e-mail events are described below.

1. E-mail Subject: Faculty eMOA In Process Reminder  
   To: Appointee SLU E-mail  
   Cc: Initiator, Department Chair, Appointee Personal E-mail  
   Description: E-mail is sent to current faculty and staff who do not need a background check once the initiator submits the eMOA.

Your memorandum of agreement (MOA) is in process. Once your MOA is available for your acceptance, you will receive an additional e-mail with instructions as to how to proceed. In the meantime, if you have any questions about your assignment, please contact your department chair.

2. E-mail Subject: Faculty MOA Application and Background Check Reminder  
   To: Appointee SLU E-mail  
   Cc: Initiator, Department Chair, Appointee Personal E-mail  
   Description: E-mail is sent to new faculty who must complete a background check once the initiator submits the eMOA.

Dear (appointee):

Your memorandum of agreement (MOA) is in process. Once your MOA is available for your acceptance, you will receive an additional e-mail with instructions as to how to proceed.

If you are a new faculty member, please download the New Adjunct Faculty Checklist for information on steps you will need to take prior to beginning your assignment. If you have not completed your background screening questionnaire, Please note: Adjunct faculty in the School of Medicine who provide services on a voluntary basis and those in the School of Law are not required to complete all of the items on the checklist. Please contact your department for additional information.

Should you have questions regarding your faculty appointment, please contact your department.  
In the meantime, if you have questions about your faculty appointment, please contact your department chair.
3. E-mail Subject: Faculty MOA Application and Background Check Reminder
   To: Appointee SLU E-mail
   To: Appointee
   Cc: Initiator
   Description: E-mail is sent to the appointee, after the VP Academic Affairs approves, notifying them that an eMOA is ready for acceptance.

Dear (appointee):

I am pleased to inform you that your appointment as (rank) has been approved.

Your assignment for (term), (part of term) is:

(Course Info)
(Course Info)
(Duties)

Please acknowledge your acceptance of the terms of this agreement by going to the “Employee” tab in Banner Self-Service. Click on the link called “Memorandum of Agreement to Accept.” Your Memorandum of Agreement (MOA) will be available for your review. To accept the contract, click on the “submit” button located at the bottom of the contract.

NOTE: Your contract is not considered executed until you have clicked the “submit” button. Failure to submit the contract will result in delayed payment. The submitted contract will remain available for your review in Banner Self-Service at any time. You may also print a copy for your records.

If you have any questions about the contract, please contact your department chair (do not reply to this e-mail).

I am delighted that you have agreed to provide these services to Saint Louis University, and thank you for your time and commitment.

Sincerely, VP for Academic Affairs Saint Louis University

4. E-mail Subject: Appointee Accept Message
   To: Initiator
   Cc: Department Chair
   Description: E-mail is sent to the initiator after the appointee accepts the eMOA.

This e-mail message is to notify you that the Memorandum of Agreement for (appointee), (dept), (term), (part of term) has been accepted by the appointee.
5. **E-mail Subject: Appointee Decline Message**
   To: Initiator
   Cc: Department Chair
   Description: E-mail is sent to the initiator after the appointee declines the eMOA.

This e-mail message is to notify you that the Memorandum of Agreement for (appointee), (dept), (term), (part of term) has been declined by the appointee.

6. **E-mail Subject: Disapproval of requested MOA for (appointee) and department (dept)**
   To: Initiator
   Description: E-mail is sent to the initiator after an approver disapproves the eMOA.

This e-mail message is to notify you that the Memorandum of Agreement for (appointee), (dept), (term), (part of term) has been disapproved by (approver). Please notify the appointee that the Memorandum of Agreement is no longer pending.

The disapproval comments are:

(Disapproval comments)

7. **E-mail Subject: Return for Correction of MOA for (appointee) and department (dept name)**
   To: Initiator
   Description: E-mail is sent to the initiator after an approver returns the eMOA for correction.

This e-mail message is to notify you that the Memorandum of Agreement for (appointee), (dept), (term), (part of term), has been returned to you for correction. Please make all applicable changes and re-submit for approval.

(Return for correction comments from approver)

Thank you.

8. **E-mail Subject: Memorandum of Agreement Pending Approval**
   To: Approver
   Description: E-mail is sent nightly notifying approver that an eMOA is pending his/her approval.

The Adjunct Faculty Memorandum of Agreement(s) listed is (are) now in your queue for approval.

(Appointee names)

Please review and either approve or disapprove. Please add comments to explain why the Adjunct Faculty Memorandum of Agreement(s) has (have) been disapproved. Please follow this link: [Banner Self Service](https://banner.selfservice) to log in to Workflow and approve or disapprove. Thank you.
9. E-mail Subject: Memorandum of Agreement Cancellation Message  
To: Initiator, Previous Approvers, Appointee  
Description: E-mail is sent to the above individuals after an eMOA is cancelled, and before the appointee accepts.

This e-mail message is to notify you that the Memorandum of Agreement for (appointee), (tracking number), (duties), (dept), (term), (part of term) has been cancelled.

The reason provided was: (Cancellation reason). No further action is required at this time.

10. E-mail Subject: Memorandum of Agreement Cancellation Message  
To: Initiator, Previous Approvers, Appointee  
Description: E-mail is sent to the above individuals after an eMOA is cancelled, after the appointee accepts, and if the contract start date is more than 2 weeks from the cancellation date.

This e-mail message is to notify you that the Memorandum of Agreement (MOA) for (appointee), (tracking number), (duties), (dept), (term), (part of term) has been cancelled. The reason provided was: (Cancellation reason).

Per the terms of the executed MOA, the appointee is hereby granted two weeks’ notice of the contract’s cancellation. No further action is required at this time.

Sincerely,

VP for Academic Affairs Saint Louis University

11. E-mail Subject: Memorandum of Agreement Cancellation Message  
To: Initiator, Previous Approvers, Appointee  
Description: E-mail is sent to the above individuals after an eMOA is cancelled, after the appointee accepts, and if the contract start date is within 2 weeks of the cancellation date, or the contract start date has already passed.

This e-mail message is to notify you that the Memorandum of Agreement for (appointee), (tracking number), (duties), (dept), (term), (part of term) has been cancelled within two weeks of the start date.

The reason provided was: (Cancellation reason).
12. E-mail Subject: Notification of cancellation after an EPAF has been created
To: Initiator, Business Manager
Description: E-mail is sent to the above individuals after an eMOA has been cancelled and EPAF was created.

This is a reminder that a manual ‘endjob’ or ‘term’ EPAF must be initiated for the cancellation of the following eMOA(s): (list of eMOA tracking numbers).

In addition, to be in compliance with the adjunct policy, should the eMOA be canceled within 14 working days of the proposed start date of the course, a manual EPAF must be initiated for 10% of the agreed upon salary up to a maximum amount of $500.

The canceled eMOA contract number must be referenced on the EPAF. The following statement should be noted in the comment: eMOA canceled within 14 days of proposed start date. Per contract, this is to pay 10% of the agreed upon salary.

Please contact the Office of Faculty Affairs at facultyaffairs@slu.edu, or via phone at 977-7382 or 977-7381 with any questions.

The Office of Faculty Affairs

13. E-mail Subject: Notification of acceptance but with no EPAF
To: Initiator, Business Manager
Description: E-mail is sent to the above individuals after an eMOA has been accepted and manual EPAF is required.

This email is a reminder that a manual EPAF must be initiated for the following bi-weekly or PRN eMOA(s):

(list of eMOA tracking numbers)

Please contact the Office of Faculty Affairs at facultyaffairs@slu.edu, or via phone at 977-7382 or 977-7381 with any questions.

The Office of Faculty Affairs