# Personal Service Agreement Process

If **ALL** of the below conditions are true, you may simply complete a *Disbursement Form and submit it to the Accounts Payable Department* for payment **AFTER** the services have been rendered.

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
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<tbody>
<tr>
<td>1) The total cost of this PSA is less than $3,000 (including expenses)</td>
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<tr>
<td>2) The total cost of all PSA's with this vendor in any 12 month period does not equal or exceed $3,000 (including expenses)</td>
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<td>3) The purpose of this PSA is for services only (i.e., independent contractors as defined by state and federal law, consultants, speakers, or performers)</td>
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<td>4) This PSA does not quality as an employee/employer relationship as defined by state and federal law</td>
<td>A questionnaire to assist you in determining this is available at <a href="http://www.csu.edu/page.cfm?p=785">http://www.csu.edu/page.cfm?p=785</a></td>
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<tr>
<td>5) The contract period of this PSA is less than one year</td>
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<td>6) This PSA does not involve teaching a credit bearing class</td>
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<td>7) The service provider is not a state employee (includes student worker, graduate assistant, graduate intern, etc.)</td>
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<tr>
<td>8) The service provider does not have an immediate family member (as defined in the PSA manual) who is a state employee</td>
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<td>9) There is no other means of accomplishing the work within the University structure.</td>
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<tr>
<td>10) If ALL 9 conditions above are true, please fill out a Disbursement Form and W-9 and submit it to Accounts Payable <strong>AFTER</strong> the services have been rendered.</td>
<td><strong>No PSA form is required.</strong></td>
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If one or more of the conditions above are **NOT** true, follow **ALL** of the steps below to complete the PSA process successfully:

1. Is the PSA being entered into with:
   - A Company? The PSA will be treated as an Independent Contractor (IC). **Skip to #7.**
   - An Individual? **Continue to #2.**

2. Is this individual going to be a guest speaker/ non-credit instructor/entertainer?
   - Yes **Skip to #4.**
   - No You must complete a PSA Independent Contractor or Employee (IC/EE) Preliminary Determination Questionnaire. **Continue to #3.**

3. After completing the IC/EE Preliminary Questionnaire, this PSA is determined to be an:
   - Independent Contractor? **Continue to #4.**
   - Employee? **STOP.** Contact Human Resources at x21756.

4. Is the individual a current state employee?
   - Yes **STOP.** Contact Rick Piotrowski at x22537 or Tom Brodeur at x22531.
   - No **Continue to #5.**

5. Does this individual have an immediate family member who is a state employee?
   - Yes **Continue to #6.**
   - No **Skip to #7.**

6. Are both conditions true: 1) The PSA is determined to be an IC relationship (per the IC/EE questionnaire) and 2) The value of this PSA is $100 or more
   - Yes The PSA must have gone out to bid and proof of bid must be submitted with PSA. **Continue to #7.**
   - No **Skip to #8.**

7. Are both conditions true: 1) The PSA is determined to be an IC relationship (per the IC/EE questionnaire) and 2) The value of this PSA is more than $10,000
   - Yes This PSA must have gone out to bid and proof of bid must be submitted with the PSA OR a sole source justification must be completed and submitted with the PSA. **Continue to #8.**
   - No **Continue to #8.**

8. Does this PSA utilize any grants funds?
   - Yes Contact Kathy Knopf in the Grant’s Office. Once approved **continue to #9.**
   - No **Continue to #9.**

9. **Contact Rick Piotrowski X22537 or by email in Business Services in accordance with the deadlines below to initiate the PSA.**

## DEADLINES

- If the PSA is valued at less than $3,000: AT LEAST 15 business days prior to the service start date
- If the PSA is valued at $3,000 or less than $10: AT LEAST 8 weeks prior to the service start date
- If the PSA is valued at $10,000 or more: AT LEAST 12 weeks prior to the service start date

**PLEASE NOTE:** PSA's submitted must be accurate and complete. PSA's with inaccurate or incomplete information/forms are not considered "submitted" until the deficiencies have been corrected/submitted.

*rev. 02/07/2014*