

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.

- 1) The total cost of this PSA is less than \$3,000 (including expenses)
- 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)
- 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)
- 4) This PSA does not qualify as an employee/employer relationship as defined by state and federal law
A questionnaire to assist you in determining this is available at <http://www.ccsu.edu/page.cfm?p=785>
- 5) The contract period of this PSA is less than one year
- 6) This PSA does not involve teaching a credit bearing class
- 7) The service provider is not a state employee (includes student worker, graduate assistant, graduate intern, etc.)
- 8) The service provider does not have an immediate family member (as defined in the PSA manual) who is a state employee
- 9) There is no other means of accomplishing the work within the University structure.
- 10) If ALL 9 conditions above are true, please fill out a Disbursement Form and W-9 and submit it to Accounts Payable **AFTER** the services have been rendered. **No PSA form is required.**

If one or more of the conditions above are NOT true, follow ALL of the steps below to complete the PSA process successfully:

Please note that all steps below must be followed to ensure that all necessary forms are submitted and that all policies and procedures are followed regarding your PSA submission.

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.