All PSAs

Do not submit a PSA to Purchasing Services if your agreement is an Office of Research type agreement.

☐ Review the 20-Factor Test webpage to determine whether you need to take this test.

☐ If applicable, complete the 20-Factor Test to determine whether the Service Provider is an independent contractor or an employee. If the determination is “employee”, then you need to hire the individual through University of Pittsburgh Human Resources. DO NOT PROCEED WITH THE PSA PROCESS.

☐ If you did not need to take the 20-Factor Test, or if the 20-Factor Test determined that the Service Provider is an “independent contractor”, then save the 20-Factor Test determination page; if applicable; obtain an IRS W-9, W-8, or applicable IRS document from the Service Provider; obtain a Certificate of Insurance listing the University of Pittsburgh as the insured; complete the appropriate PSA form (Non Federal or Federal Funds)

☒ When completing a PSA form, fill in all blanks including the
  ☐ Service Provider’s name and address;
  ☐ contract start and end dates;
  ☐ *Detailed Scope of Services; and
  ☐ fee or value of the contract.

☐ Retain a copy of all above documents as specified in the Record Retention Policy

*For assistance with the Scope of Services section, refer to Scope of Services Writing Tips

Prepare the PSA:

☐ Print two originals.
☐ Have both originals signed by an authorized manager.
☐ Mail both signed originals to the Service Provider with these instructions:

☒ Service Provider is to sign both documents, retain one copy, and return the other copy to you.

PSAs $5,000.00 and Under

PSAs Over $5,000.00

Submit the following to your assigned Purchasing Services Procurement Specialist:

☐ Results of the 20-Factor Test, if applicable;
☐ PSA (without departmental signatures);
☐ Certificate of Insurance; and
☐ Evidence of competitive bidding or a Directed or Sole Source Form with an original signature approval by a dean, director or departmental chair.

Final Submission to Payment Processing

After satisfactory services are provided, review the Disbursement Policy, complete a Disbursement Request, and submit the following documents to Payment Processing:

☐ *Copy of PSA;   ☐ *Service Provider’s invoice;   ☐ *Disbursement Request;   ☐ copy of 20-Factor Test (if applicable); and an ☐ IRS W-9, W-8, or applicable IRS document.

*The Service Provider’s name must be the same on the PSA, invoice, Disbursement Request, and W-9.