FOOTNOTE
You do not need to complete the 20-Factor Test if:
1. The individual is incorporated (i.e. Corporation, Corp, Incorporated or Inc. is part of the individual's name).
2. The individual is
   • A sporting official for intercollegiate athletic events;
   • An announcer or commentator for athletic events;
   • An academic program review consultant (this includes accreditation team members);
   • A performer, entertainer, or professional athlete; i.e., a non-employee who provides entertainment services to the university for a fee.
• A guest speaker; i.e., a non-employee who provides services to the university for a fee or honorarium in which one-time lectures, discourses, or presentations are given;
• A series editor, copy editor, manuscript reader, or book designer, or;
• Trainers and consultants under contract to present seminars for the Pennsylvania child welfare resource center.

Purchasing Methods for Service Agreements (SA)

1. Review checklist to determine if this an Office of Research or Purchasing Services Agreement
2. Is this a Supplier or an Employee? Use the 20 Factor test. Note: See footnote for exceptions
   - Supplier
     - Are you buying Restricted Services? Yes
       - Contact Purchasing Services
       - Submit Supplier Verification Form (if not in Panther Express System) Normal processing time (upon receipt of completed documents): 3 days
     - No
       - Contact Purchasing Services for RFQ/ RFP
3. Employee
   - Use the 20 Factor test, provide copy of CCH 20 factor test
4. Submit and approve requisition through Panther Express System Normal processing time (upon receipt of completed documents): 5 days
5. Obtain Certificate of Liability Insurance (COLI)
6. Complete Directed or Sole Source Justification Form
7. Obtain at least 3 competitive bids (quotes)
8. Complete Contract Entry Form (CEF)
9. Draft Scope of Services (SOS) – Schedule A

Indicates shape is linked
NOTE: Word documents and PDFs, depending on your browser settings, will not open automatically. To view, open file from downloads in your browser or from your downloads folder.