



# UNIVERSITY OF PITTSBURGH

Purchasing Services  
412-624-6106  
412-624-9339 FAX

## CHECKLIST FOR PROFESSIONAL SERVICES AGREEMENT (PSA) NON-RESTRICTED SERVICES

### 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](#)

### PSAs \$5,000.00 and Under

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 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.