

Portland State University  
Personal/Professional Service Contract (PSC)  
INSTRUCTIONS

**IF ANY REQUIRED INFORMATION IS NOT COMPLETE, THE PSC WILL NOT BE PROCESSED AND WILL BE RETURNED TO YOU FOR COMPLETION.**

FIELDS

1. **Banner Document #:** Fill in your Banner purchase order or invoice number here. If the vendor is a Non-Resident Alien (NRA) you will leave this field blank and hit Tab. The vendor will be paid via Direct Pay Invoice once PSC is approved by CAPS.
2. **Vendor ID#:** When the Banner Vendor Record is completed your department should be notified of vendor's ID#. Or you may look it up in Banner in FAIVNDH.
3. **PSC No.:** This field will be auto-populated after you have input the Banner Document # or left the field blank and hit Tab key.
4. **Department:** Please fill in your full department name. Please do not use any abbreviations.
5. **Contractor:** Please fill in full vendor name as it is shown in Banner in FAIVNDH.
6. **Contractor's Fee/Honorarium (Check one):** If Contractor will be paid a fixed fee or honorarium, check the 'fixed fee' box and insert the fixed fee amount. If the fixed fee will be paid in multiple payments, set forth the payment schedule in the space provided.

If Contractor will be paid on a variable rate basis, such as an hourly rate or upon University's acceptance of deliverables, check the 'variable fee' box, insert the not-to-exceed amount and explain how the payment is calculated and the schedule for payments in the space provided.

7. **Expenses (You Must Check One):**
  - **Contractor's fee includes all expenses:** Check this box if the Contractor's fee includes Contractor's travel expenses (airfare, hotel, car rental, etc.) which are arranged and paid for by the Contractor. **This is the preferred method.**
  - **University will reimburse Contractor's travel expenses in an additional amount not to exceed \$:** Check this box if the Contractor will pay their own expenses and submit a 'Request for Reimbursement' to the University. You must inform Contractor that their travel expenses are limited to the amounts authorized in the Portland State University Travel Guide which is available at: <https://portlandstate.atlassian.net/wiki/spaces/~655483049/pages/979043391/Travel>
  - **University will directly pay third parties for travel expenses incurred by Contractor in performing services under this Contract in an additional amount not to exceed:** Check this box if your department will directly pay third party invoices for Contractor's travel expenses.
8. **Total Payments:** Add amounts in #6 and #7 and put that amount here.
9. **Total Payments for Fiscal Year:** Enter the total payments made to this Contractor by your department during the current fiscal year, including payments for this PSC. If your total is over \$25,000.00 (or \$10,000.00, if using Federal funds) contact CAPS at 503-725-3441 or [contracts@pdx.edu](mailto:contracts@pdx.edu).
10. **Attachments:**
  - **Attachment A University's Personal Services Contract Terms and Conditions:** This must be given to Contractor before signature and can be found at: <https://pdx.edu/purchasing-contracting/forms-documents>

- **Attachment B:** Only necessary if additional space is needed to fully describe the Scope of Work as defined on page 3 of the PSC.
- **Attachment C – Corporation/Independent Contractor Certification:** THIS MUST BE COMPLETED, SIGNED BY ALL NECESSARY PARTIES AND ATTACHED TO YOUR PSC, unless the Contractor is a Non-Resident Alien.
- **Attachment D – Selection/Justification Statement:** If the amount in **#9 Total Payments for Fiscal Year** is over \$25,000 (or \$10,000, if using Federal funds) you must complete and attach Attachment D to the PSC.

**11. Insurance:**

- **CGL (Contractor's General Liability):** is required if there is a risk of bodily harm or property damage in the Contractor's performance of the services under this PSC.
- **AUTO:** Automobile Liability insurance, including business use, is required if the scope of work of this PSC requires Contractor to transport individuals in the Contractor's vehicle.
- **Professional Liability:** is required if the University is relying on the professional judgment of the Contractor whose errors and omissions, during the performance of this PSC, could subject the University to undue risk.

**12. Signatures; Page 2:** Form must have signatures from Department Head and Contractor prior to submission to CAPS.

- **Contractor Citizenship Status:** The Contractor checks the appropriate box for citizenship.
  - Resident US citizen or US Entity:** No additional paperwork required.
  - Resident Alien (RA):** No additional paperwork required.
  - Foreign Entity or Non-Resident Alien (NRA):** Contractor must complete a separate IRS Form, Number 8233 to claim tax exemption. A tax treaty must exist between the U.S. and the Contractor's home country for processing the payment without withholding taxes. For guidance in completing the required documentation, see the Non-Resident Alien instructions at: <https://pdx.edu/purchasing-contracting/forms-documents>. Call the CAPS office at 5-3441 if you need further assistance. Paying Contractors who are citizens of Canada can be complicated. You should contact CAPS for assistance as soon as you determine the Contractor is a Canadian citizen. NO ADDITIONAL PAPERWORK IS REQUIRED FOR AN NRA PERFORMING ALL WORK IN THEIR HOME COUNTRY.

**13. Scope of Work: Personal and/or Professional Services to be Performed:** Provide a complete description of the agreed upon services that will be rendered. This should include WHO the services are being provided to (i.e., students, staff, faculty, etc.), WHAT type of service is being provided, WHEN is the service being provided (date, start/stop hours), WHERE is the service being performed (PSU campus site, off-campus site, out of state, online, etc.). HOW the manner in which services are being performed is crucial. Check the *Employee vs. Independent Contractor Checklist* at: <https://pdx.edu/purchasing-contracting/forms-documents> to determine if the Contractor is providing services in the manner of an independent contractor or an Employee of PSU. Services for teaching a for- credit class must be paid on a wage agreement through Human Resources department.

- **Start Date and End Date:** Enter the service dates. Please remember that **THE CONTRACTOR'S SERVICES SHOULD NOT BEGIN UNTIL THE DATE OF THE LAST SIGNATURE ON THE PSC**, usually that of the University's Contract Officer.

14. **Grant Approval:** PSC's paid from research grants or contract funds (i.e. index #'s starting with 2, 3, or 4) must be approved by your Department Research Administrator prior to routing to CAPS.
15. **Personal Service Contract Accounting Information:** Enter your FIS INDEX Code and the FIS Account Code in the spaces provided. The most frequently used Account Code is 24599 "Other Professional Services." Other Account Codes that may be used include 24505 "Performance Fees" (musicians) and 24595 "Non-resident Alien Professional Services." See the Campus Accounting Web Site for additional OUS Account Codes 02.11E (Fees & Services). Contact Campus Accounting Services for assistance with determining correct Accounting Codes.
16. **Form prepared by:** Please fill in your name, email, phone number and Mail Code so we can contact you to resolve issues rather than return the PSC to your department without processing it.

#### FURTHER INSTRUCTIONS:

1. **Banner Purchase Order:** Prepare a Banner PO if multiple payments are to be made or the payment is scheduled for more than 3 weeks from the date of the PSC. Prepare a Direct Pay invoice if there will be only one payment and payment is for work completed in the past or within 3 weeks. Record the applicable Banner document number in upper left-hand corner of PSC in the space provided. Once you have obtained Department approval of PO or invoice, forward the PSC according to routing instructions below. The Department is responsible for initiating payment against a Purchase Order via a regular pay invoice that must be submitted to Campus Accounting Services.
2. **Routing:** Send the PSC with attachments via email to [contract@pdx.edu](mailto:contract@pdx.edu) for review and signature by a CAPS Contracts Officer.
3. **Services Costing Over \$25,000 (or \$10,000, if using Federal funds):** All proposed PSC's over \$25,000 (\$10,000, if using Federal funds) must be posted on ORPIN for the purpose of obtaining additional bids. Please contact CAPS via email at [contract@pdx.edu](mailto:contract@pdx.edu) or by telephone at 5-3441 for assistance. Such posting is also required if your Department's payments to the Contractor during the current fiscal year exceed \$25,000 (\$10,000, if using Federal funds). **There are several exemptions and a few alternatives to the requirement to post a solicitation and your CAPS department can help you determine if one of these is a viable option for you.**
4. **Sole Source:** If you believe the Contractor you have selected is the only one who can perform the services you require, you will need to obtain prior approval to Sole Source the services. If you think you have a Sole Source situation, contact CAPS as soon as possible. Also, see Sole Source Guidelines and Procedures at: <https://pdx.edu/purchasing-contracting/forms-documents> for a complete description of the requirements for obtaining approval to Sole Source.