

**Personal Services Invoices
In Ten (Relatively) EasySteps**

1. Create Personal Services Invoice (PSI) using the template found at <https://pdx.edu/purchasing-contracting/forms-documents>. A PSI cannot be used for services costing over \$5,000. A PSI cannot be used to pay PSU employees or non-U.S. citizens. PSU employees **MUST** be paid through the payroll system. Non-U.S. citizens **MUST** be paid on a Personal Services Contract.
2. Send the PSI to the Contractor via email, fax or mail. Request Contractor to return the signed PSI to you via email, fax or mail.
3. If the Contractor is not in Banner as a vendor, invite a vendor via PSU's vendor setup and maintenance platform, PaymentWorks@PSU. More information regarding PaymentWorks@PSU can be found at <https://www.pdx.edu/financial-services/accounts-payable#vendor-setup>.
4. Once the vendor accepts the PaymentWorks@PSU invitation and completes the onboarding process, a Banner Vendor record will be created. Once the Banner Vendor record is created, the initiator who invited the vendor via PaymentWorks@PSU will receive an automated email with the PSU Vendor ID number.
5. When you receive the PSU Vendor ID number from CAS, add it to the PSI where indicated.
6. Create a Banner Invoice and add the Banner Invoice number to the PSI where indicated.
7. The PSI is an invoice. You do not need an invoice from the Contractor. If Contractor provides a numbered invoice, insert that as the Contractor's invoice number in Banner. If the Contractor's invoice is not numbered or if the Contractor does not provide an invoice, use the month and year of the service and a one-word description of the service as the contractor's invoice number. For example: "01/14 – speaker" for a January 2014 speaker. Any invoice received from the Contractor should be attached the PSI when you submit it to Accounts Payable.
8. Have the PSI signed by the Department Head. Only Department Heads or their designee are authorized to sign PSIs.
9. If the services are grant funded, obtain Department Research Administrator approval in the space provided on the PSI.
- 10. Submit the fully signed PSI to Accounts Payable – Mail Code FAST-CAS. DO NOT SEND THE PSI TO CONTRACTING AND PROCUREMENT SERVICES (CAPS). ACCOUNTS PAYABLE (FAST-CAS) WILL RETURN INCOMPLETE PSIs TO THE DEPARTMENT FOR COMPLETION.**

IF YOU NEED HELP PREPARING THE PSI FORM, CONTACT CONTRACTING AND PROCUREMENT SERVICES (CAPS) BY EMAIL AT contract@pdx.edu OR BY PHONE AT 5-3441.