

Personal Service Agreement (PSA) Checklist

This checklist is designed to ensure compliance with SCSU's Personal Service Agreement (PSA) procedures, supporting accurate, complete, and consistent documentation for all PSA contracts.

Services Under \$5,000

PSA's are contracts that exceed \$5,000. If the service is under \$5,000, please use the [voucher disbursement form](#) and attach a signed invoice. For invoice templates, please contact Shawna Cleary. Submit documents to AccountsPayable@SouthernCT.edu for payment.

Services Over \$5,000 (PSA's)

PSA Type: Indicate if this is an Original PSA or an Amendment to a PSA

If Amendment, include the original PSA number and only list the amendment amount.

Contractor Information: Provide contractor's full name and mailing address.

If the address is foreign, determine if the contractor is a foreign national.

If yes, complete a [W8BEN form](#). Please allow extra time for processing foreign national PSA's.

If US-based, complete a [W-9 form](#).

State Employee Status: Indicate if the contractor or immediate family member is a State Employee.

If yes, include a [Dual Employment Request Form](#). If a family member is a state employee and lives in the same household, the fee cannot exceed \$99.99.

Service Type: Is the contractor an individual performing a service other than Lecturer or Entertainer?

If yes, complete the EE or IC questionnaire. SCSU Human Resources must review/approve this document.

Contract Period: List the contract period.

If submitting paperwork after the service period began, include a [late justification](#) signed by the President or a Vice President.

Cancellation Terms: Specify the number of days required for cancellation.

Service Description: Provide a complete description of services (who, what, where, when how)

For questions, please contact **Shawna Cleary**  (203) 392-6703  clearys4@southernct.edu



Southern Connecticut
State University

Personal Service Agreement (PSA) Checklist

Payment Schedule: Payment is made following service approval by the President or Vice President or their designee. Include fee and any travel expenses, if applicable.

Total Cost: List the total cost on the PSA. For Amendments, only list the change amount.

Tax Considerations:

Is the PSA subject to Athlete & Entertainer's Tax?

Is the contractor a CT resident? (No tax)

Is payment less than \$1,000 (No tax)

Is the payment less than \$5,000 and is the speaker part of a course/academic conference? (No tax)

Banner Organization Number & Signatures

List Banner Organization Number and Index

Ensure PSA is signed by the Budget Authority

Contractor and University Official must sign and date the PSA

For questions, please contact **Shawna Cleary**  (203) 392-6703  clearys4@southernct.edu