

The Revised Professional Service Agreement (PSA) Process to accommodate Project Ascent and Human Resources Review

1.) Before the consultant begins work, the department should complete **ONE** original PSA and obtain the required signatures on page 1 (the consultant and departmental acknowledgement). The following attachments must be attached to the PSA; it is no longer allowable to indicate that they are on file in the Controller's Office:

- Scope of Work
- W-9
- Employment Status Test (a new one for each agreement)
- Philadelphia Business Privilege License (if work is performed in the city).

2.) In cases where the consultant is an individual (as opposed to an incorporated business) the completed PSA (including all attachments) should be forwarded to Human Resources (James Ortlieb, Suite 900, 833 Chestnut Street, Phone 503-4437). HR will review the "independent contractor" designation. If approved, Jim will sign off on the Employment Status Test and forward the PSA package to ORA. The originating department will be contacted if the review indicates that the agreement may not proceed. *In cases where the consultant is a company, the completed PSA can be forwarded directly to ORA.*

3.) ORA will review the PSA, addressing any concerns with the agreement, and obtain the signature of the Director of ORA. ORA will retain the original fully executed agreement in the grant file and forward a scanned copy of the agreement to the originating department and Human Resources.

4.) The department will forward the scanned copy of the fully executed PSA to the consultant.

5.) The department will create a special request requisition in Project Ascent for an "amount only" PO, attaching a copy of the approved PSA (including all attachments) at the first line (not the header). The natural account is "7009". Include contact information in the "Comments" section (name and campus key) for all staff who should receive notices (expiration notice, for example). If no additional contact information is provided, only the original requisitioner will receive notices related to the PO.

6.) The Project Ascent PO request is routed through departmental workflow and then through ORA. ORA will review/approve the request. The request is then automatically routed to Supply Chain Management.

7.) Supply Chain Management will build a contract record in the Contracts module of Project Ascent, including the begin/end date of the agreement.

8.) Supply Chain Management will notify the consultant of the Purchase Order Number. Only the original requisitioner will receive an automated e-mail notification of the PO number.

9.) As the consultant submits invoices, the department will review, ensure that the PO number is included and forward the invoice to Accounts Payable for payment. If the final invoice is not received within 60 days after the PSA end date, an over-ride (with ORA approval) will be required.