



**Personal Service Agreement (PSA) Checklist**

**The submitted PSA should contain the following information regardless of which form is used:**

- Contractor's complete name and mailing address in appropriate box. *(If address is in a foreign country, will need to find out if Contractor is a foreign national.)*
- An answer to question regarding whether or not contractor is a State Employee or has an immediate family member that is a State Employee.
  - If answered "Yes" to whether or not Contractor was State Employee is Dual Employment Request Form included?
  - If Contractor has an immediate family member who is a state employee, Contractor may not be paid more than \$99.99.
- Is contractor an INDIVIDUAL performing a service other than Lecture or Entertainer?
  - Yes ***(EE or IC questionnaire must be completed)***
    - ECSU Human Resources approve / deny (circle one)
- Contract Period is listed.
- The number of days notice required for Cancellation of PSA is listed.
- Complete description of services noting who, what, where, when and how the service will be performed is included.
- Payment schedule notes that payment is to be made following the service upon approval of the Vice President or his/her designee.
- Payment schedule includes the fee and any travel expenses if applicable.
- The Total Cost has been listed on the PSA.
- Is PSA subject to Athletes & Entertainers Tax?
  - Is contractor resident of CT? (no tax)
  - Is payment less than \$1,000? (no tax)
  - Is payment less than \$5,000 and speaker is part of a course/academic conference? (no tax)
- The Index number has been listed on the PSA and the PSA has been signed by the Budget Authority.
- The Contractor has signed and dated the PSA.
- The University Official has signed the PSA.
- Appropriate Nondiscrimination Certification Form has been included with PSA. ***(Form A if Contractor is Individual/Form B if Contractor is Business Entity/Form C if Contractor is Business Entity and PSA is over \$50K)***
- If applicable, a Late Justification Memo has been included.