



## Professional Services Guide (Payment to Business and Business Professionals)

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**(See the Independent Contractor Guide for Payment to Individuals)**

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### Definitions

Contractor – Professional hired to perform services for the University

eCUBE- Electronic procurement system

Invoice – Document sent to Accounts Payable to initiate payment to the vendor

PSA – Professional Service Agreement

### Overview

[University Policy 3-04 Contract Compliance/Administration](#) designates Procurement Services as the office to review, manage, and ensure continued adherence to contractual agreements.

An agreement must be completed for any services exceeding \$999 in order to prevent unnecessary exposure to liability by the University. The signature level authorities are as follows:

#### Dollar Threshold

Up to \$1,499

\$1,500 to \$9,999

\$10,000 to \$14,999

\$15,000 or more

#### Signature Approval Required

Associate Dean, Department Chair, or Director

Dean, Associate Provost, or Associate Vice President

Division/Area Officer

Vice President for Finance & Business Operations

**All agreements must be fully executed and a valid purchase order must be issued prior to the commencement of any work.** The agreements are normally posted to account code 701805 – Contractual Fees and Services but other account codes may apply.

[University Policy 3-03 Purchasing Limits for Competitive Selection](#), states that any purchase exceeding \$50,000 for goods or for services, or \$200,000 for construction must be competitively solicited and awarded. The policy also designates Facilities as oversight on any construction/renovation projects exceeding the current prevailing wage rates thresholds. See the policy for exclusions to these requirements.

All agreements may be subject to review by General Counsel. Business professionals could include (not an exhaustive list):

- Architect
- Engineering Services
- Artwork
- Construction Contractor (unless competitively bid – then would use OFCC contract)
- Consulting
- Counseling/Doctors
- Repairs/Maintenance Contractors
- Carpet Cleaning

In some instances, it may be more practical to use the other party's contract forms (non-standard agreements). Please see the "[Contract Compliance and Administration Guide](#)" for requirements. All non-standard agreements must be reviewed and approved by General Counsel and signed by the Vice President for Finance & Business Operations. If it is not reviewed and approved by General Counsel, the agreement could be invalid. Exceptions may apply to grant funded projects. For grant related expenditures – See [Guidebook Policy 10-13 Research, Grants, and Sponsored Programs](#) for signature requirements.

### **General Procedures**

1. Look up the vendor in eCUBE to determine if they have an existing vendor record. If not found, include a copy of the [New Vendor Information/Substitute IRS W9](#) form with the Professional Service Agreement (PSA).
2. The [PSA Form](#) is data enterable and posted on the Procurement Services webpage.
3. Complete the PSA information. If any necessary information is left blank, the PSA will be returned to the department unsigned.
4. Note – you will need to insert the requisition number after the requisition is entered in the system (see below).
5. Have the contractor sign the PSA and complete the new vendor form (if applicable).
6. Attach any quote from the contractor to the PSA.
7. Send the new vendor information form to Procurement Services (if applicable).
8. Enter the requisition in eCUBE on either a non-catalog order or Standing Order. Put the requisition number on the top of the contract and send to the proper signature authority.
9. Once the contract is signed, scan the final contract and attach to the external attachments on the requisition in eCUBE.
10. This procedure will deliver a copy of the completed contract with the Purchase Order to the vendor when it is faxed to them from the system.
11. The contractor must submit an invoice to Accounts Payable for all services rendered indicating the purchase order number in order to initiate payment.
12. If PO is a Non-catalog order, the department is required to enter a receipt.
13. If PO is a Standing Order, the Financial Manager will approve the invoice electronically in eCUBE.

Change orders to standing orders can be requested by completing the Change Order Request form in eCUBE. If the original order amount plus the change order request amount exceeds \$999 the PSA must be amended and signed by appropriate authority.

**Note - The agreement may span more than one fiscal year subject to compliance with The Ohio Constitution in Article II, Section 22 and Ohio Revised Code Section 131.33 requiring that any appropriation or financial obligation incurred by the state specify a maximum dollar amount and limit that obligation to the duration of the current biennium.; regardless, the requisition entered in eCUBE can only be for the current fiscal year amount. The eCUBE “copy to a new cart” feature may be used for subsequent requisitions. Please make sure the contract is attached to all requisitions.**