

PROFESSIONAL SERVICE CONTRACT CHECKLIST FOR CONTRACTS UNDER \$2,000

STEP 1 | Start here and gather the basic documents

Rev. 10/26

WHAT THIS CHECKLIST IS FOR

Use this checklist when preparing a professional service contract over \$2,000.
Work from top to bottom and check each box only after the item is complete.

BEFORE YOU BEGIN

Department/Unit

Prepared by

Contractor/Provider

Date prepared

The contractor/provider is the person or company that will perform the professional service. Use the same name on every document.

REQUIRED FOR EVERY CONTRACT UNDER \$2,000

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1. Banner Purchase Requisition

Enter the requisition in Banner, then review the information for accuracy.

ALWAYS REQUIRED

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2. Contract Form

Complete the contract form and attach a clear scanned copy.
Do not mark this complete until the contractor has signed it.

ALWAYS REQUIRED

STOP AND CHECK

Before moving on, make sure the contractor name and contract information match the Banner requisition and contract form.

DOCUMENTS REQUIRED WHEN APPLICABLE

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3. Individual Questionnaire Form

Required when the contract is with an individual or partnership.
Attach a clear scanned copy.

PROFESSIONAL SERVICE CONTRACT CHECKLIST FOR CONTRACTS UNDER \$2000

STEP 2 | Review, submit, and route payment documents

Rev. 10/26

FINAL REVIEW BEFORE SUBMISSION

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All required documents are included and readable.

Check this only after reviewing the complete package.

FINAL CHECK

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The contractor name and information are consistent across all documents.

Check this only after reviewing the complete package.

FINAL CHECK

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The contractor has signed the contract.

Check this only after reviewing the complete package.

FINAL CHECK

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The package is complete and ready to submit.

Check this only after reviewing the complete package.

FINAL CHECK

SUBMIT THE CONTRACT PACKAGE IN THIS ORDER

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1. Send for Administration signature

Send the contractor-signed contract to NSU approvals.

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2. Scan the complete package

Scan the contract and all other required supporting documents.

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3. Email Purchasing

Email the complete scanned package to purchasing@nsula.edu.

PAYMENT AND CLOSEOUT ROUTING

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Accounts Payable Voucher

Forward the Accounts Payable Voucher to Accounts Payable.

SEND TO AP

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Contractor Original Invoice

Forward the contractor's original invoice to Accounts Payable.

SEND TO AP