

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

☐

1. Banner Purchase Requisition

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

ALWAYS REQUIRED

☐

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.

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

STEP 2 | Use the yes-or-no questions to identify extra documents

Rev. 10/26

HOW TO USE THIS PAGE

Read each question. If the answer is YES, complete the item and check the box.
If the answer is NO, write N/A in the notes area at the bottom of the page.

DOES THE CONTRACTOR OR SERVICE MEET THIS CONDITION?

☐

Is the contract with an individual?

YES: Complete the Individual Questionnaire Form and attach a clear scanned copy.

IF YES

☐

Is the contract for \$5,000?

YES: Include the Goals and Objectives document and attach a clear scanned copy.

IF YES

☐

Is this a consulting service?

YES: Include the contractor's resume and attach a clear scanned copy.

IF YES

☐

Is the contract over \$20,000?

YES: Complete all three items in the next section.

IF YES

IF THE CONTRACT IS OVER \$20,000

☐

Board Resolution

Required for corporations, including limited liability corporations. Attach a clear scanned copy.

OVER \$20,000

☐

Request for Agency Review - Civil Service

The form must be signed by the President. Attach a clear scanned copy.

OVER \$20,000

☐

Secretary of State Verification

Confirm the contractor is Active & In Good Standing and attach a clear scanned copy.

OVER \$20,000

Notes / items marked N/A:

PROFESSIONAL SERVICE CONTRACT CHECKLIST FOR CONTRACTS OVER \$2000

STEP 3 | Review, submit, and route payment documents

Rev. 10/26

FINAL REVIEW BEFORE SUBMISSION



All required documents are included and readable.

Check this only after reviewing the complete package.

FINAL CHECK



The contractor name and information are consistent across all documents.

Check this only after reviewing the complete package.

FINAL CHECK



The contractor has signed the contract.

Check this only after reviewing the complete package.

FINAL CHECK



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



1. Send for Administration signature

Send the contractor-signed contract to the necessary NSU approvals.



2. Scan the complete package

Scan the contract and all other required supporting documents.



3. Email Purchasing

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

PAYMENT AND CLOSEOUT ROUTING



Accounts Payable Voucher

Forward the Accounts Payable Voucher to Accounts Payable.

SEND TO AP



Contractor Original Invoice

Forward the contractor's original invoice to Accounts Payable.

SEND TO AP