

Professional Service Agreement (PSA) Checklist

NOTE: A PSA is only required when a supplier is to be contracted for when **more than \$5,000**. If **less than \$5,000**, it is recommended (Schedule A required).

VUSN Principal Investigator: _____

COA/Project Number: _____ **Grant:** _____

VUSN Point of Contact: _____

VU Department of Finance Contact: _____

Step 1 – Completion of Necessary Documents and Supplier Registration

- ☐ **VUSN Point of Contact** provides **VUSN Principal Investigator** with **PSA**, **Schedule A**, and additional documents (when needed)
 - ☐ Location of Services (required if services will be provided outside U.S.)
 - ☐ Protection of Minors Training (required if working with children under 18)
 - ☐ Conflict of Interest (required if not using VU PSA form)
- ☐ **VUSN Principal Investigator** submits filled (but not signed) **PSA** and **Schedule A** to **VUSN Point of Contact**
- ☐ **VUSN Point of Contact** confirms consultant as a **VU supplier** in Oracle
 - ☐ To **search** suppliers, go to **Oracle → Suppliers** and click on the **Search** (magnifying glass) symbol on the right
 - ☐ To **register** new supplier, go to **Oracle → Suppliers** and click on the **Invitations** tab at the top.
 - ☐ Click on the **Generate Spend-Authorized Supplier Invitation** and send the email to the new consultant for them to register themselves. If they need support during the registration process, they may reach out to SupplierRecords@vanderbilt.edu
 - ☐ **Note:** You will not receive an automatic notice of their official registration. You will have to request that the consultant inform you of when they receive confirmation of their registration or continue to search the **Suppliers** page.

Step 2 – Approval of PSA Documents

- ☐ **VUSN Point of Contact** submits filled (but not signed) **PSA** and **Schedule A** to **VU Department of Finance** for review
 - ☐ Amendment(s): _____
- ☐ **VU Department of Finance Contact** submits approval of **PSA** and **Schedule A** to **VUSN Point of Contact**
- ☐ **VUSN Point of Contact** acquires signatures on the **PSA** and **Schedule A** from the consultant and **VUSN Principal Investigator**

Step 3 – Purchase Order

- ☐ **VUSN Point of Contact** completes the **Non-Catalog Order by Amount/Quantity** in Oracle and attaches **PSA** and **Schedule A**
- Requisition Approved – **Purchase Order (PO) #:** _____