

Personal Service Agreement (PSA)

The College of William and Mary/VIMS

Employer: <input type="checkbox"/> W&M <input type="checkbox"/> VIMS	Banner ID # : Employee Name: <div style="display: flex; justify-content: space-around; width: 100%;"> Last First Middle </div>	Date:
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The contracting department must determine the appropriate payment method BEFORE a specific payment amount is committed to the Service provider. *In general, classified, university, hourly and student employees must be paid for additional services as a secondary job and will not be paid using a personal service agreement (see back for exceptions).* Please refer to the guidelines on the reverse side of this form to ensure the proper payment process.

****If index 811008 is the index being charged on this form, you must have prior approval from the College of William and Mary Foundation.**

_____ **Investment Administration Approval**

Index **	Account	Percent

DESCRIPTION OF SERVICE (Must Be Completed)

Work/Duties Performed

Begin Date	End Date	Check Requested Date	Home Org	Amount of Payment

PAYMENT FOLLOWS DELIVERY OF SERVICE. PSA payments are considered supplemental income to the employee's primary job and are subject to the following taxes: Federal (25%), State (5.75%), and Social Security (7.65%). The College will report earnings as required by the Internal Revenue Service.

APPROVALS

_____ Faculty Member/Provider of Service	_____ Phone/Ext. Number	_____ Date
_____ Departmental Approval	_____ Phone/Ext. Number	_____ Date

Any Personal Service Agreements of \$1,000 or more must have Budget approval. The approval of the V.P. for Administration is required for university, classified/hourly employees.

_____ Dean Approval	_____ Phone/Ext. Number	_____ Date
_____ V.P. Administration	_____ Phone/Ext. Number	_____ Date
_____ Budget Approval	_____ Phone/Ext. Number	_____ Date

HUMAN RESOURCES USE ONLY

_____ Employment Approval	_____ Date
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I-9:	Received Date:	Banner:
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PAYMENT GUIDELINES TO BE UTILIZED FOR SERVICES RENDERED OUTSIDE OF PRIMARY/CONTRACT POSITION ASSIGNMENT

A Personal Service Agreement (PSA) is a contract between the CWM, or some unit thereof, and an individual or group for services to be performed for the CWM. A PSA authorizes payment for professional services. Using the information below, **the contracting department must determine the appropriate payment method BEFORE a specific payment amount is committed to the service provider.**

1. For an individual not employed by the CWM who has provided services to the University or one of its divisions or departments as an independent contractor (see definitions below). For payment for services rendered by persons not employed by CWM, an invoice must be completed to initiate payment. Please call Accounts Payable at 1-2840 or 1-2836 with any questions.
2. PSA for a faculty member* already working for CWM. Human Resources reviews these PSAs to determine if the services are outside of the faculty member's normal responsibilities.

* In general, classified, university, hourly and student employees may not be paid using a Personal Service Agreement. In most cases, they are performing additional duties as an employee and must be paid as a secondary job. There are limited exceptions (some are shown below) under which classified, university or hourly employees may be paid using a Personal Service Agreement; **any other exceptions must be discussed with Human Resources prior to contracting for the service with the employee:**

- ❖ An Employee who serves as a pianist, violinist or other accompanist for a single event;
- ❖ An employee who paints a portrait or creates a sculpture for a department's use;
- ❖ Scorekeepers, focus group participants, research-study participants;

Examples:

Situation	Examples	How to Pay
A non-CWM employee provides services as an independent contractor (i.e., the work is controlled only in regard to the results and not the means of achieving them).	- A person types a manuscript using his/her own equipment, time and workplace and whose responsibility to CWM is the product itself. - A person delivers a single lecture, or a week long workshop.	Complete an invoice to initiate payment for services. Contact Accounts Payable at 1-2840 or 1-2836 for assistance.
A non-CWM employee provides service as an employee (i.e., the work is controlled in regard to the results and the means of achieving them).	- A person types a manuscript in the workplace using CWM equipment and whose responsibility to CWM is the process used and product. - A person, not otherwise employed by CWM, teaches a class during a semester.	Set-up as an employee paid hourly or as adjunct faculty member.
A current classified, university or hourly employee performs duties similar to those in his/her primary position or duties for which he/she is directed regarding the results and details of the work.	- A person is paid to provide clerical support, such as data entry or typing of a manuscript. - A person is paid to complete a project or help with work overload. - A person teaches a for-credit class, with responsibility for grading students, for all or most of a term. - A person teaches a non-credit course on an extended or repeated (several times a year) basis.	Set-up as secondary job. Determine appropriate classification and pay rate and complete a PAF to pay the employee for the additional work hours. Please note that the provisions of the Fair Labor Standards Act must be followed regarding overtime.
A faculty member performs work outside of his/her normal assigned duties.	- A faculty member teaches a continuing education class. - A faculty member serves as a consultant on another faculty member's grant.	Use attached Personal Service Agreement. Use Grants/Contract Salary Authorization form.

Definitions:

Employee – A person is considered an employee when the “employer” has the right to control and direct the individual regarding the result of the work to be accomplished and the details of work. If an employer/employee relationship exists, the person performing the work should be set up in a job.

Independent Contractor – A person is considered an Independent Contractor when the work is controlled only in regard to the results, and not the means of achieving them. If the person meets the definition of an independent contractor, an invoice is the appropriate method of payment.