

Steps for Processing a Professional Services Agreement (PSA):

1. Use the draft Professional Services Agreement (PSA) template on the Procurement Website at <https://escambiaschools.org/Page/1073>. Please revise as needed the red sections of the PSA. Please include dates, time of event, details of the services to be provided, and name of the consultant(s) performing the services.
2. The school/department will notify the vendor that fingerprinting and a background check to obtain a District badge must be completed through the Human Resources Department prior to performing services. With approval from the Protection Services Department, a Line-of-Sight form may be utilized in lieu of "badging" in some instances. The Line-of-Sight form can be obtain from the Protection Services Department. No purchase order will be issued until the Procurement Department has been provided documentation that the vendor has a District badge or an approved Line-of-Sight form.
3. The school/department will enter a requisition and attach the draft Professional Services Agreement (PSA) as a Word document, a copy of the vendor's District security badge or Line-of-Sight form, and other supporting documentation into Skyward. Reminder: A purchase order will not be issued without security documentation.
4. Procurement will review the draft Professional Services Agreement (PSA) and makes adjustments, if necessary. Services over \$50,000.00 will require legal review and approval from the Board attorney and School Board. Please provide all PSA over \$50,000.00 to the appropriate Procurement Specialist at least six (6) weeks before the services are to begin. For services under \$50,000.00, please allow two (2) to three (3) weeks for the completion and issuance of the PSA and purchase order. Reminder: Splitting the dates of service to bring the cost below the School Board threshold is not permitted. Please plan accordingly.
5. The Director of Procurement signs the final copy of the Professional Services Agreement (PSA) if the total cost is less than \$50,000.00. It will be mailed to the vendor for signature. If the PSA cost is over \$50,000.00 and approved by the School Board, the Procurement Department will email the purchase order. The PSA will be sent via DocuSign to the vendor for signature.
6. Procurement will place a remittance hold through Accounts Payable on the purchase order until the signed PSA is returned to the Procurement Department.
7. Upon receipt of the vendor's signed PSA, it is attached in Skyward to the purchase order by the Procurement Department.
8. After services have been performed, the school/department will enter a receiver into Skyward.

9. Payment is issued to the vendor upon the return of signed Professional Services Agreement (PSA), receipt of invoice documents, a receiver entered into Skyward, and services were completed in a satisfactory manner.