



**RUTGERS**

School of Health Professions

### Professional Service Agreements (PSA)

#### A. Contract Development, Review and Approval Instructions

1. Prepare a statement of work and budget for the services that will be rendered for the outside entity. The fee for services rendered should incorporate a 20% Dean's office administrative fee (included in the fee, not as a separate line item on the budget).
2. Once the statement of work and budget is complete, develop the draft agreement by utilizing either the approved ***Rutgers SHP Professional Service Agreement (PSA) Template*** that can be downloaded from the SHP administrative procedures website (can be found under the "Office of the Dean" tab on the home page), or the template provided by the entity for which we are providing services. Please download the latest template (regularly) to ensure that you are utilizing the latest version. The template of the entity should be submitted as a *Microsoft Word* document. It is preferable to use the *SHP PSA Template* as it is pre-approved by the legal department and thus processing is expedited. Note, the RBHS official signatory is Kathleen Bramwell, MBA, Vice Chancellor for Administration, but the contract must also be "recommended by" the SHP Dean, Gwendolyn Mahon, PhD.
3. Submit the draft PSA as a *Microsoft Word* document via e-mail to Eric Dwojak at <dwojakej@shrp.rutgers.edu> for review and approval by the Dean's Office, the Legal Department and ultimately the Chancellor's office. The draft PSA must be accompanied by a contract cover sheet signed by the Department Chairperson to indicate their approval of the work. The contract cover sheet may be found at the administrative procedures website.
4. Once the PSA has been signed by all Rutgers signatories, it will be returned to the initiator via e-mail so they can acquire the signatures of the entity for whom services will be rendered. If the entity is willing to sign the document electronically using *DocuSign*, the initiator should provide Eric with an e-mail from the entity that provides the official signatory's name and e-mail address so he may communicate with entity directly to ensure the correct signatory has been provided, and then route it to them for execution via *DocuSign*.
5. Once the PSA has been signed by all parties, the initiator should send a copy via email to Eric Dwojak who will upload it into the *Meditract* database and provide Kelly Harewood of the finance office with a copy. If the agreement was signed electronically by all parties using *DocuSign*, Eric will upload it directly into *Meditract* and email a copy to both the initiator and the Office of Finance.

## **B. Tracking of Provision of Services, Invoicing and Payment for Services Rendered**

The Office of Finance will work with the Department to provide oversight of the accounting of the contract. A master tracking system for each department will be set up and administered by SHP Finance.

1. An ***SHP PSA Activity Tracking Sheet*** for the work performed by each faculty member for each agreement must be generated. The activity sheet must be signed by the faculty member performing the work and their chairperson before an entity is billed for the services. The template *SHP PSA Activity Tracking* worksheet may be downloaded from the administrative procedures website.
2. The ***SHP PSA Template Invoice*** should be used for billing for the work performed. The *SHP PSA Template Invoice* may be downloaded from the administrative procedures website.
3. Upon invoicing, checks will be mailed to the Office of Finance, care of Kelly Harewood.
4. Kelly Harewood will match the check with the appropriate agreement, will notify the department of receipt of payment, and deposit the check into the corresponding department account for professional services.

## **C. Distribution of Funds**

20% of total/gross direct costs of the service agreement will be charged as a Dean's Office administrative fee.

Once all costs associated with the services provided and admin fees to be paid to the Dean's Office are covered, the remaining revenue will be distributed as follows:

1. 30% to a Department Discretionary Account for use for faculty development or other scholarly activities of the department (publication costs, travel to conferences, research costs, symposia, meetings).
2. If the faculty member(s) involved in the delivery of services are at full workload, and this work is done outside the activities to be included in their academic base salary, then 70% will be distributed to the faculty member(s) involved in the project, either as additional compensation above their base salary, or may be transferred to an SHP discretionary account for their use for scholarly activities.
3. If the faculty involved in the delivery of services under the contract are not at full workload, or have been assigned the contract work as part of their workload/academic base salary, then all of the revenue will go to a departmental discretionary index for use for faculty development or other scholarly activities within the department.

## **D. Exceptions**

Not all contracts/agreements will fall under this policy. Please contact the Dean's Office for review and determination.