

## Purchasing Professional Services: At a Glance Reference Grid

Determine which transaction must be used to purchase a professional service. Supporting documentation must be completed and associated to the transaction. Use the grid below to determine what documentation is required.

<i>Criteria</i>	Use this EFS transaction	Statement of Work ( <a href="#">UM 1697</a> )	(PSIS) Professional Services Information Sheet ( <a href="#">UM 1669</a> )	Performance Contract ( <a href="#">OGC-SC514</a> )	Supplier Invoice OR Check Request Form ( <a href="#">UM 1659</a> )	Nonresident Alien Data Collection Worksheet ( <a href="#">UM 1695</a> )	Department Request for Exception to Regents Purchasing Policy ( <a href="#">UM 1721</a> )
<i>Non PO voucher (less than \$3,000)</i>	Voucher ( <i>no</i> Requisition)	Required*	Required if paying with sponsored funds. <i>Link to voucher via Perceptive Content.</i>	N/A	Required. <i>Link to voucher via Perceptive Content.</i>	Required when paying foreign national suppliers. <i>Link to voucher via Perceptive Content.</i>	N/A
<i>Quick Contract for Professional Services (QCPS): \$0-\$49,999.99</i>	Requisition	Required	Required on all sponsored contracts; Required on non-sponsored contracts \$3,000+.	N/A	Required with payment (contract must be issued before the payment).	Required when paying foreign national suppliers.	N/A
<i>Contract for Professional Services (CPS): \$50,000+</i>	Requisition	Required	Required if there is a legitimate need to pursue the Request for Exception to Purchasing Policy process. Otherwise, not required if a competitive RFP is conducted by Purchasing Services.	N/A	Required with payment (contract must be issued before the payment).	Required when paying foreign national suppliers.	Required if there is a legitimate request to not pursue the competitive Request for Proposal (RFP) process.
<i>Performance Contract (any dollar amount)</i>	Requisition	Required	Required on all sponsored contracts; Required on non-sponsored contracts \$3,000+. Otherwise, not required if a competitive RFP is conducted by Purchasing Services.	Required. This is the actual contract and must be attached to the requisition.	Required with payment (contract must be issued before the payment).	Required when paying foreign national suppliers.	Required if \$50,000+ and there is a legitimate request to not pursue the competitive Request for Proposal (RFP) process.

\* Per the [Purchasing a Professional Service policy](#), a statement of work is required for all professional services. For non-PO vouchers less than \$3,000 the statement of work can simply be written in the voucher’s justification. The justification must state the date(s) of service and a summary of the work that was performed. For example, “Dr. A presented their research findings on cow nutrition as the keynote speaker at the MN Milk Producers’ conference hosted by our department at the Kelly Inn in St. Cloud on 11/05/17.” Otherwise for more complex services, the [statement of work](#) may be linked to the voucher as a Word document or PDF.