PSA Confirming Order – Compliance Checklist

IMPORTANT NOTICE

A **confirming order** indicates that **University policy was violated** because services began **before** a fully executed Professional Services Agreement (PSA) and an approved Purchase Order (PO or BPO) were in place.

As a result, you **must** follow the Confirming Order process and **complete this checklist in its entirety**.

Failure to complete **all required steps** may result in **payment delays, additional administrative review, or denial of reimbursement**.

Policy Requirement (Standard Practice)

All PSAs must be accompanied by an approved Purchase Order (PO or BPO *before* the start of any services), regardless of whether the consultant is paid:

- Once, **or**
- In multiple installments

Proceeding without prior approval is **not permitted** under University policy.

What Is a Confirming Order PSA?

A PSA becomes a **Confirming Order** when:

- Services began **before** the PSA and PO/BPO were fully executed
- Normal procurement procedures were **not followed**
- **CFO approval is required** to proceed retroactively

Confirming Orders are exceptions, not standard practice, and are subject to enhanced scrutiny.

Required Documentation (ALL ITEMS REQUIRED)

☐ Fully executed **Professional Services Agreement (PSA)**
☐ **CFO approval letter** (current CFO, Orley Wainberg) authorizing the Confirming Order
☐ Written explanation describing **why services began before PSA and PO approval**
☐ Consultant **invoice**

⚠️ **Services must not continue** until all documentation and approvals are complete.

Vendor Verification in ESM

☐ Confirm whether the vendor already exists in **ESM**
If vendor IS already in ESM:
☐ Upload PSA
☐ Upload CFO approval letter
☐ Upload invoice
If the vendor **is NOT in ESM (new vendor):**
☐ Individual: W-9
☐ Entity: W-9, NJ Business Registration Certificate (NJ BRC)
☐ New Vendor Form
☐ Submit documents to **Patricia Bontempo** for vendor setup
☐ Allow **24 hours** for vendor activation before proceeding

Requisition & Approval Process

☐ Enter requisition in **ESM**
    ☐ **PO** – one-time payment
    ☐ **BPO** – ongoing or installment payments
☐ Wait for **all required approvals** to be completed
☐ Once the PO or BPO is issued:
    ☐ **Receive the transaction** in ESM

Invoice Submission for Payment

☐ Email invoice and PO/BPO to acctspay@kean.edu
☐ CC: **Ada Rodriguez**
Accounts Payable will process and remit payment.

Final Compliance Reminder

🚫 **Do not allow services to begin** without:

- A fully executed PSA
- An approved PO or BPO

Confirming Orders document a **policy violation**; they do not override procurement requirements.