



Independent Contractor (IC) Instructional Checklist

Prior to the start of a project, departments and independent contractors must sign the university's Professional Services Agreement (PSA). To be binding, the PSA must be approved by the Legal Department prior to being signed by the Vice President for Administration & CFO who must sign all PSA's. To protect all parties and to expedite IC processing, it is important that departments use the latest version of the university's IC forms available online. Deviations from this process may require additional review and can cause delays in processing payment IC's.

TIP: Independent Contracts are for individuals. Companies are not Independent Contractors.

Explanation of Forms: The IC Checklist may be helpful to ensure you have completed the contract properly. It is intended to be a guide. All IC forms must be submitted together as on packet.

- Request of Legal Review of IC packet forms**
 - The Independent Contractor packet is initiated by the department and presented to Legal counsel to begin the process.

- Professional Services Agreement**
 - Form completed and signed by the Vice President/CFO after Legal has reviewed the Independent contractor packet.

- Proposal of Work**
 - The duties and/or services are clearly and sufficiently defined.

- Assessing Worker Status/Employee or Independent Contractor Checklist**
 - The form determines independent contractor status and the assessment for the IC must be greater than employee.
 - All headings must be completed including Contract worker, CSU Assessor, position and date.
 - Form must be signed by the contractor and dated.
 - Legal makes final determination on the Independent Contractor status.

- Independent Contractor Acknowledgement Form**
 - All portions (Step 1 &2) should be completed entirely.
 - The acknowledgement (step 3) must be signed and dated.
 - The Vice President/CFO submits to the State of Ohio.

- New Vendor Information Form**
 - All parts of this form must be completed by the independent contractor.

- Request for Taxpayer – Identification Number and Certification (W-9)**
 - Part I & II and certification must be completed.