Independent Contractor Instructions

For any service provider doing business under their social security number (independent contractor), a Scope of Work (SOW) form must be completed and approved by Employee Services. It can take several months to complete the SOW process, set-up a service provider as a vendor in CU Marketplace, and create a Purchase Order (PO), so please begin this process well in advance; these steps should be completed before the service provider begins work.

Complete instructions on the SOW process are located at
https://www.cu.edu/employee-services/collaborative-hr-services/cu-campuses/scope-work-sowindependent-contractor

To begin completing the online SOW form, follow the above link, scroll down to the "Start a Scope of Work form" button, and click on it. The form will take 10-15 minutes to fill out and must be completed in one sitting. Below is supplemental information to help you complete the form. **All fields on the form with asterisks must be completed.**

CU Contact Information

1. Department – Environmental Studies
2. Department Number – 10169
3. Are you the same person who will approve this SOW request – YES

Service Provider Information

4. Name (first and last)
5. Email
6. The other information should be filled out by the service provider once form is routed to them for signature

Proposed Work Information

7. Provide detailed information about the work to be performed or SOW will be returned to you

Payment Details

8. Contract begin and end dates must be within the period of performance
9. Total amount must include any covered travel-related expenses - it's prohibited to use other, separate procurement methods (Procurement Card, Travel Card, Marketplace Purchase Order, or Non-Employee Reimbursement form) to cover travel costs for the independent contractor - all covered travel expenses must be detailed on invoices

Internal Revenue Service Classification Factors Checklist

10. Your answers to these questions will determine if the service provider can be classified as an independent contractor or must instead be classified as an employee (see https://www.irs.gov/taxtopics/tc762 for more information)

Service Provider Certification/Authorizations

11. Authorizing name should auto-populate
12. Fill in "Org Unit Authorizing Title" (i.e. Professor, Assistant Professor, Research Associate, etc.)
13. Click the "Submit" button

Routing for Signatures/Approvals

14. Service Provider Certification (at this step the service provider should add their personal information)
15. Organizational Unit Certification (the SOW requestor should provide this certification)
16. Employee Services Approval

Next Steps: Supplier Set-Up, Purchase Order Creation and Invoicing

The Employee Services approval process can take up to 7 business days. Once Employee Services approves the SOW form, you'll receive a copy with all required signatures. Forward a copy of this document to lisa.forman@colorado.edu.

Lisa will send the service provider an invitation to become a supplier in CU Marketplace, determine if a Purchase Order (PO) needs to be created, and initiate the PO requisition process, if need be. Do <u>not</u> authorize the service provider to perform any work until Lisa provides you with a PO number or tells you that no PO is needed.

If the service provider contacts you with questions about how to complete their supplier profile in CU Marketplace, you should direct them to visit the Procurement Service Center webpage Becoming a Supplier.

The independent contractor must send you an invoice when payment is due. Once you receive and approve an invoice for payment (verifying that the work detailed on the invoice is complete), forward the invoice to lisa.forman@colorado.edu for processing.

Invoices must be legible and include the following or Accounts Payable will not process payment:

- The purchase order # (if applicable)
- The supplier name and remit to address
- The name of the university and department receiving the goods or services
- A detailed description of the goods or services
- The date the goods or services were provided
- The total amount owed for this invoice
- An invoice number, unique from all others from the supplier