

Independent Contractor Questionnaire

This questionnaire is used to determine the correct classification for individuals who will receive payment from William Paterson University of New Jersey (WPUNJ) in exchange for services provided. Individuals will be classified as either independent contractor or employee. The questions on this form are based on IRS guidance, including the IRS 20-factor test.

Select Vendor Type: US Vendor

Non-US Vendor

Procedure:

1. This form must be approved by the Office of the Controller prior to committing funds of the University to any individual for payment of services.
2. The transacting department can email the Office of the Controller explaining the nature of the engagement for these services and request a determination, or complete the form and request confirmation of determination.
3. If the individual providing services is a non-resident alien, tax clearance via Glacier is required.
4. See related documents: "Payment to Individuals Flowchart", "Payment to Individuals Flowchart Explanation", and "Glacier Tax Compliance Process" for further information.

Name of Individual:

Section 1

1. Does the individual offer these services to the public on a regular basis, and if so, is evidence of such readily available (such as website, advertising, etc.)? yes ____ no ____
If "no", skip Section 2. The individual will be paid as employee.
2. Is the individual a current or former employee of WPUNJ providing similar services? yes ____ no ____
If "yes", skip Section 2. The individual will be paid as employee.
3. Is the individual a guest lecturer/speaker who will serve at WPUNJ in this capacity no more than 2 times during the calendar year? yes ____ no ____
If "yes", skip Section 2. The individual will be paid as independent contractor.

Section 2

4. Is the individual required to comply with instructions on when, where, and how work is performed?
yes ____ no ____
5. Does WPUNJ provide training to the individual on the manner in which work should be performed?
yes ____ no ____
6. Does WPUNJ set the individual's hours of work or define where work should be performed?
yes ____ no ____
7. Does WPUNJ provide the location, materials, and/or tools in which the service will be performed?
yes ____ no ____
8. Does WPUNJ have control over the course materials used by the individual?
yes ____ no ____
9. Is the individual providing services similar to those provided by a current WPUNJ employee, or serving in a role that is typically held by an employee at WPUNJ?
yes ____ no ____
10. Does the individual perform in a supervisory capacity over WPUNJ employees?
yes ____ no ____
11. Will the individual perform services repeatedly or on an ongoing basis?
yes ____ no ____

Section 3

Classification: *Independent Contractor* _____ *Employee* _____

Other and/or unique factors considered in determination:

Form Rev: Feb 2018

Bus.Services authorization _____

Additional questions required to be submitted with ICQ Form:

1. Would you please provide a little more information about what services this vendor will be providing?
2. If they do not provide this service to the public, why did you ask them to perform this service?
3. Do the vendor(s) have complete autonomy or are they required to comply with instructions about when, where, and how the work is to be done?
4. Can you clarify if the vendor will follow the university's curriculum or specific guidelines?
5. Please provide any documentation such as an outline, flyer, website, lecture, agenda, and so forth to better assist the Controllers Office/Accounts Payable to make a final determination.

Requester:

Department: