This how-to sheet outlines the steps required to:

- Fill out a cheque requisition form to request payment to an independent contractor.
- The information to fill out this form comes from an invoice received from an independent contractor.

**How does paying an independent contractor differ from paying a vendor?**
There are more steps when using a cheque requisition to make a payment to an independent contractor.

- **1a.** First, you must ensure that the individual is indeed an independent contractor (step 1 of this how-to sheet).
- **1b.** If the individual is not currently designated an independent contractor, you must complete the ‘Independent Contractor Questionnaire’ (step 2 of this how-to sheet).
- **2.** Second, complete the cheque requisition form for payment to an independent contractor (step 3 of this how-to sheet).

**eShop’s cheque requisition form should be used to ...**
Request payment to an individual or vendor when the following criteria have been met:

- A purchase order has not been processed in eShop for the invoice received, and
- the payment is not for personal reimbursement of business expenses. [Travel, non-travel, and professional expense reimbursement must be submitted through the SAP Concur Travel and Expense Reimbursement system.](#)

**Important Notes:**

- **Social Insurance numbers (SIN) should never be included on this form.** Accounts Payable requires the SIN before payment can be issued. If you believe that an independent contractor has been paid by Carleton University before, their SIN will already be in Banner. If you are not sure, contact Accounts Payable (accounts.payable@carleton.ca).
- One cheque requisition form is required for each invoice.
1a. **Searching eShop for an independent contractor:**

The first step is to determine if an individual is currently an independent contractor at Carleton University.

Click on the ‘**medal**’ icon in the menu on the left-hand side of your screen.

Type the name of the vendor or the independent contract number in the ‘**Type to Search Contacts ...**’ field and hit the ‘Enter’ key.

**Tip:** You can also click on ‘Search Contacts’ to adjust search parameters.
1b. **Searching eShop for an independent contractor:**

In the ‘Contract Details’ window …
- The blue independent contractor number (e.g. IND-004049) has to be entered into the cheque requisition form (step 3 of this how-to sheet).
- The text beneath the blue independent contractor number tells you what kind of service the independent contractor provides (e.g. Art Installer).
- The ‘Vendor’ field has the name of the independent contractor (e.g. Constructive Behaviour).
- The ‘End Date’ tells you whether the independent contractor is still active (i.e. you cannot pay as an independent contractor past the end date).

**Tip:** Highlight the blue independent contractor number with your mouse and click <CTRL> + <C> on your keyboard to copy the independent contractor number.

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**IMPORTANT!**

If the independent contractor is active, copy the independent contractor number into the cheque requisition form (skip to step 3 if this how-to sheet).

If the independent contractor is not listed in the contract search results OR the independent contractor is no longer active, you must complete an ‘Independent Contractor Questionaire’. **Wait** to receive confirmation of whether an individual has been given independent contractor status **BEFORE** work is undertaken by the individual (step 2 of this how-to sheet).

**Tip:** Reach out to eshop@carleton.ca if you believe that the independent contractor should be in eShop, but you can’t find them.
2a. Independent Contractor Questionnaire ...

Click on the ‘house’ icon in the upper left-hand corner of your screen to return to the eShop landing page.

2b. Independent Contractor Questionnaire ...

On the landing page, scroll down to the ‘Forms’ box.

Click on the blue ‘Independent Contractor Questionnaire’ text.

2c. Independent Contractor Questionnaire ...

The first section on the form tells you what the form is for and any important information about filling it out.

Click on the blue ‘Independent Contractor Indemnification Agreement’ text to print this form. Complete the form, including wet signatures, and save a digital copy.

You will have to attach the ‘Independent Contractor Indemnification Agreement’ to this form in step 2f.

2d. Independent Contractor Questionnaire ...

Complete these three fields.
2e. Independent Contractor Questionnaire …

Click on the radio button beside ‘Yes’ or ‘No’ to answer each of the questions.

Reach out to eshop@carleton.ca with any questions.

2f. Independent Contractor Questionnaire …

Complete and attach a signed ‘Independent Contractor Indemnification Agreement’ form (see step 2c of this form).

To attach the form, click on the blue ‘Add’ text and follow the prompts.

2g. Independent Contractor Questionnaire …

Once you have completed the form, click on the ‘red arrow’ button and choose from the options in the drop-down menu to add the form to a cart (e.g. ‘Add to Cart’).

Tip: ‘Independent Contractor Questionnaire’ forms should not be added to a card with anything else.

IMPORTANT!

ALWAYS wait to receive confirmation of whether an individual has been designated an independent contractor BEFORE work is undertaken by the individual.

Accounts Payable will send the requestor a comment through eShop to confirm.
3a. **Cheque Requisition ...**

Once you have an invoice from an independent contractor, you must complete a cheque requisition form to request payment.

On the landing page, scroll down to the ‘Forms’ box.

Click on the blue ‘Cheque Requisition’ text.

3b. **Cheque Requisition ...**

The first section on the form tells you what the form is for and any important information about filling it out.

**IMPORTANT!** NEVER include a Social Insurance Number (SIN) on this form.

3c. **Cheque Requisition ...**

In the ‘Payments to Individuals and Sole Proprietorships for Services’ section, enter the independent contractor number in the ‘Independent Contractor Contract #’ field.
3d. **Cheque Requisition ...**

To answer the questions in the ‘Services Performed Outside Canada’ section, click the radio button beside either ‘No’ or ‘Yes’ for each question.

**Tip:** Answering yes to the ‘Does the department wish to incur …’ question ... means that the funding source will be charged for the amount of the invoice PLUS a withholding tax.

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3e. **Cheque Requisition ...**

In the ‘Vendor Information’ box, begin typing the name of the independent contractor in the ‘Enter Vendor’ field.

**Tip:** Only those fields with a star must be filled in (e.g. ‘Enter Vendor’).

When the name of the independent contractor appears, click on it. The information related to the independent contractor will autofill.
3f. **Cheque Requisition ...**

Fill in the following fields in the ‘Payment Information’ box...

Choose the ‘Commodity Code’ that is the best fit for your purchase from the drop-down list.

**Tip:** Commodity codes allow eShop to route documents and compare like items. If needed, there is a complete list of commodity codes and associated account codes available.

Enter the amount of the invoice BEFORE taxes in the ‘Payment Amount Before Taxes’ field.

If taxes appear on the invoice, click the ‘Is there tax on this invoice’ radio box.

Enter the date found on the invoice by clicking on the ‘Invoice Date’ field and choosing the date from the calendar.

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3g. **Cheque Requisition ...**

If the vendor requires payment in a currency other than Canadian or US, complete these fields.

Reach out to eshop@carleton.ca if you have questions.
3h. You must attach all relevant supporting documentation (e.g. an invoice).

Click on the blue ‘Add’ text and follow the prompts to attach a digital copy of the invoice.

4. Once you have completed the form, click on the ‘red arrow’ button beside the red ‘Add And Go to Cart’ button. Choose an option from the drop-down menu to add the form to a cart (e.g. ‘Add to Cart’).

Tip: Cheque requisition forms should not be added to a cart with anything else.

What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.