Steps required to establish contracts with independent contractors:

- First, you must check if the individual is already set up as an independent contractor.
- If the individual is not currently designated an independent contractor, you must complete the ‘Independent Contractor Questionnaire’.
- If the individual is assessed and found to be an independent contractor, you will be prompted by email to complete the ‘Confirmation and Indemnification Agreement’ form.
- Initiating Payment:
  - under $10,000
  - over $10,000

Important Notes:

- Social Insurance numbers (SIN) should never be included on any form or sent via e-mail. When paying an individual who is not registered for HST/GST, Accounts Payable requires their SIN before payment can be issued. If you believe the individual may need to provide their SIN, please contact Accounts Payable for instructions (accounts.payable@carleton.ca).
- Accounts Payable will review the ‘Independent Contractor Questionnaire’ and make the final determination of an employer-employee relationship or self-employed status.
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 **Contracts 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 Contracts …’** field and hit the ‘Enter’ key.

**Tip:** If your initial search does not return any results, try typing in just the first name or just the last name.
1b. **Searching eShop for an independent contractor:**

In the ‘Contract Details’ window, the ‘Active for Shopping’ field tells you whether the independent contractor has an active contract.

- If ‘Yes’, then proceed to step 5
- If ‘No’, or if the vendor did not appear in your search, then proceed to step 2

2a. **Independent Contractor Questionnaire:**

Click on the **Home 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.

2d. **Independent Contractor Questionnaire:**

Complete these four fields.

2e. **Independent Contractor Questionnaire:**

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

Reach out to [accounts.payable@carleton.ca](mailto:accounts.payable@carleton.ca) with any questions.

2f. **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 cart with anything else.
3. **Wait** to receive confirmation that the individual has been designated an independent contractor **BEFORE** work is undertaken by the individual. **Accounts Payable will send a comment in the form of an email through eShop to confirm independent contractor status.**

   **Tip:** Do not turn email notifications off in eShop. If you need help turning your email notifications back on, reach out to [eshop@carleton.ca](mailto:eshop@carleton.ca).

4. **Indemnification Form:**
   Once status has been confirmed, carefully review, fill out, and sign the ‘**Confirmation of Information and Indemnification Agreement**’ form.

   Email the completed ‘Confirmation of Information and Indemnification Agreement’ form to [accounts.payable@carleton.ca](mailto:accounts.payable@carleton.ca). Accounts Payable will send a comment in the form of an e-mail through eShop to provide the independent contractor number (e.g. IND-000001).

5. **Initiating Payment:**

   If the anticipated value of services over the length of the engagement is **less** than $10,000, **a cheque requisition is used to initiate payment.**

   **OR**

   If the anticipated value of services over the length of the engagement is **over** $10,000, **a Purchase Requisition Form is required prior to initiating payment.**

**What next?**
- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email [eshop@carleton.ca](mailto:eshop@carleton.ca) or call 613-520-2600 ext.3311.