

Before engaging with an independent contractor, make sure you are adhering to the [Procurement Policy](#).

### 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' so Accounts Payable can determine their status (employee vs. self-employed).
- If the individual is assessed and found to be an independent contractor, you must complete the ['Confirmation and Indemnification Agreement' form](#). If the individual is found to be an employee, you will be directed to Payroll.
- You must determine if the total amount of the payment to the independent contractor will be over or under \$25,000. This will determine how you initiating payment:
  - under \$25,000 - [a cheque requisition is used to initiate payment](#).
  - over \$25,000 - [a Purchase Requisition Form is required prior to initiating payment](#).

### 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](mailto: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.
-

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

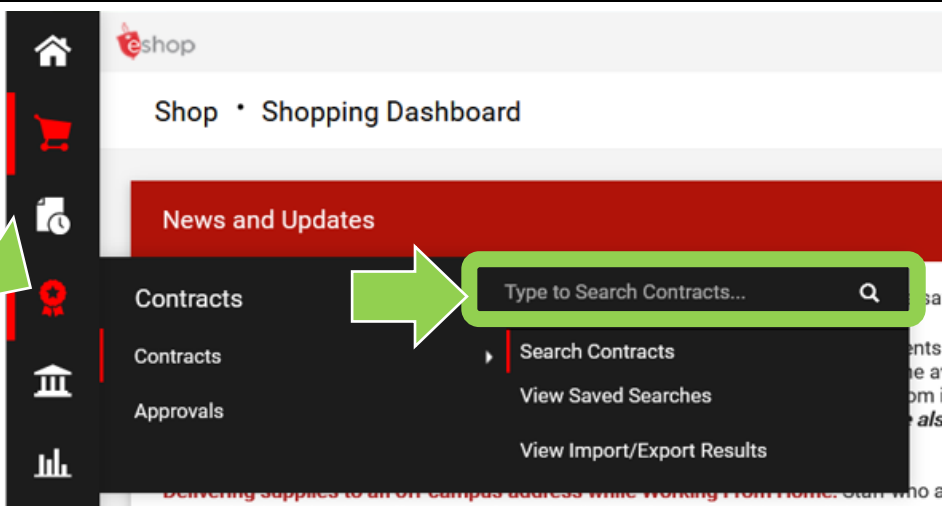
1a. **Searching eShop for an independent contractor:**

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:**

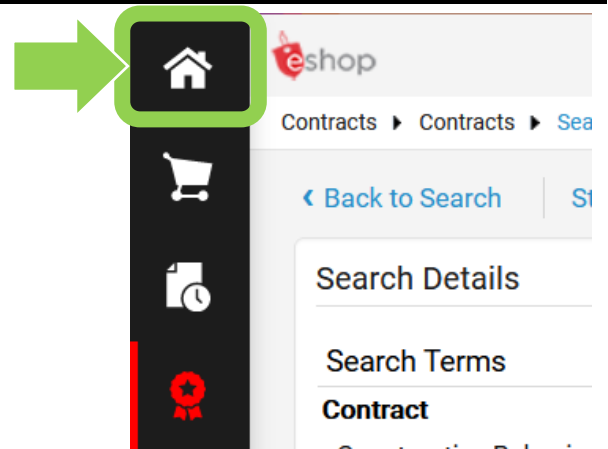
In the **'Contract Details'** window, the **'Active for Shopping'** field tells you whether the independent contractor has an active contract.

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

The screenshot shows the 'Contract Search Results' page. At the top, it says '1-1 of 1 Results' and 'Sort by Best Match'. Below this is the 'Contract Details' section, which is highlighted with a green box. It displays the contract ID 'IND-004049' and the vendor 'Art Installer'. The contract type is 'Independent Contractor'. The 'Active for Shopping' field is set to 'Yes'. Other details include 'Start Date: 01/09/2021', 'End Date: 01/09/2022', 'Version Type: Original', and 'Renewal No.: 0'. There is an 'Open Summary' button.

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:**

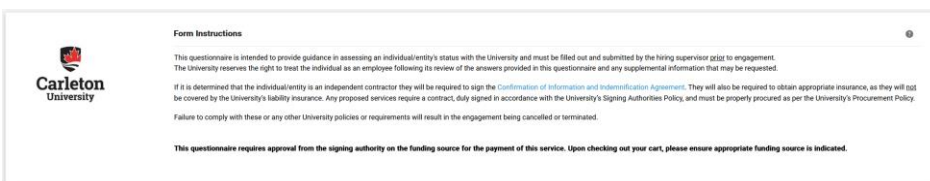
On the landing page, scroll down to the **'Forms'** box.

Click on the blue **'Independent Contractor Questionnaire'** text.

The screenshot shows the 'Forms' section on the landing page. It is a green box with the title 'Forms' and a dropdown menu. Below the title, there is a list of links: 'Cheque Requisition', 'Purchase Requisition', 'General Internal Request', and 'Independent Contractor Questionnaire'. A green arrow points to the 'Independent Contractor Questionnaire' link.

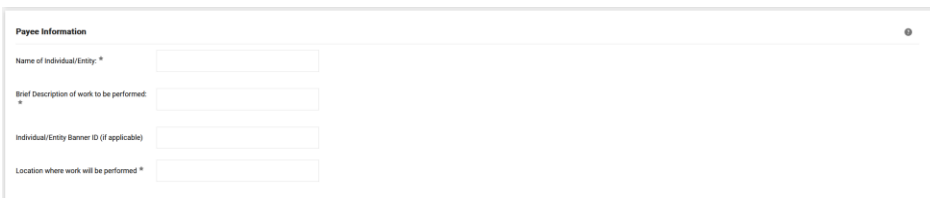
## 2c. Independent Contractor Questionnaire:

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:

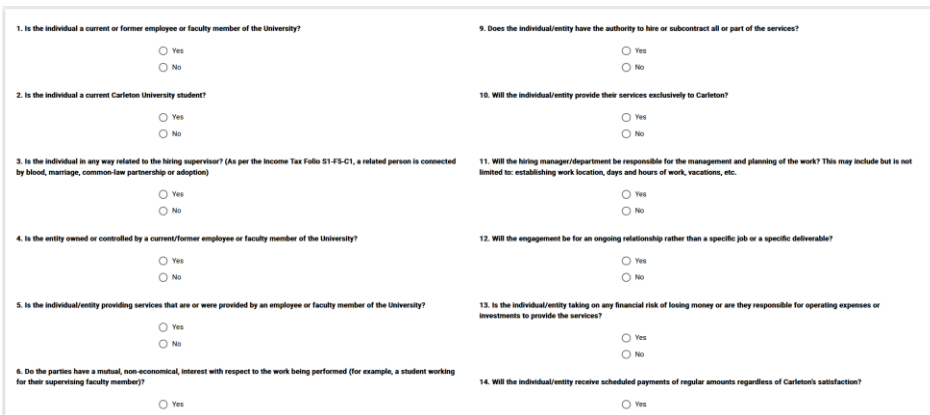
Complete these four fields.



## 2e. Independent Contractor Questionnaire:

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

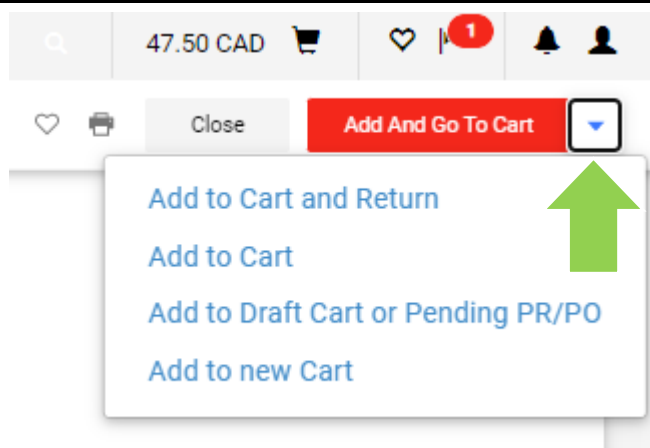
Reach out to [accounts.payable@carleton.ca](mailto:accounts.payable@carleton.ca) with any questions.



## 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.** If the individual is determined to be an employee, then Accounts Payable will direct you to Payroll.

**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 \$25,000, [a cheque requisition is used to initiate payment.](#)

**OR**

If the anticipated value of services over the length of the engagement is over \$25,000, [a Purchase Requisition Form is required prior to initiating payment.](#)

---

**What next?**

- Visit [carleton.ca/facts/eshop](http://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.
-