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).
- 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

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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.

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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.** 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, an **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 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.