



## How to Complete the Independent Contractor Review Form

This form is to be completed by the Appropriate Administrator an/or Documented Designee. The purpose of the form is to verify individuals contracted with Sonoma State University (SSU) meet the CSU, state, and federal regulations governing independent contractors.

**\*\*ALL REQUESTS MUST BE APPROVED BY HUMAN RESOURCES PRIOR TO WORK PERFORMED ON CAMPUS\*\***

- **If the proposed individual is a current CSU employee, former CSU employee, or employee of any California state agency, DO NOT** proceed with the Independent Contractor Review form. The department and individual will be required to review and complete the [Special Consultant Agreement Form](#).
1. Save the Independent Contractor Review Form to your computer.
  2. Open the saved form on your computer and complete all required information within the form.
  3. Complete the "Scope of Work" section with all requested information.
  4. Digitally sign the document.
  5. Send completed document to [hr@sonoma.edu](mailto:hr@sonoma.edu).
  6. Human Resources will further review the form and return the finalized copy marked as "Approved" or "Denied."

Please contact Human Resources at [hr@sonoma.edu](mailto:hr@sonoma.edu) with any questions.

# Independent Contractor Review

This form is to be completed by the Appropriate Administrator and/or Documented Designee. The purpose of the form is to verify individuals contracted with Sonoma State University (SSU) meet the CSU, state, and federal regulations governing independent contractors.

To be completed by the department:

Is the proposed contractor a current CSU employee, former CSU employee, or employee of a California State Agency?

Yes      No

**If yes, do not proceed.** You will need to process payment as an Sonoma State University [Special Consultant](#).

Contract Service Dates	Submitted by	Date Submitted
Name (Last, First, MI) ("Contractor") PLEASE PRINT	Home Address (Street Number and Name)	City, State
Zip Code	Email Address	Phone Number

If you answer "YES" to any of the questions below, please contact Human Resources at [hr@sonoma.edu](mailto:hr@sonoma.edu) as further review and approvals may be required.

Yes      No

- Will the contractor have access to PeopleSoft data, or performing work with minors?  
If so, background check is required.
- Will the contractor be allowed to work concurrently for other organizations/clients while working for the university?
- Is the work being performed integrated into a reoccurring routine or ongoing operations?
- Will the contractor be required to comply with university-provided instructions about when, where, and how to work? (Employees are subject to this type of instruction. Independent contractors are free from the employer's control and direction).
- Will the contractor be able to hire and pay his/her own assistants?
- Will the contractor be able to set his/her own hours and priorities?
- Will the contractor receive instructions/training from the university? (Employees generally receive training from their employer, independent contractors typically determine their own work methods).
- Will the contractor be hiring or supervising university employees?
- Does the contractor customarily engage in an independently established trade, occupation, profession, or business? (Factors relevant to this determination include whether the business is incorporated or licensed, whether services are advertised, and whether the contractor also offers services to the public or other potential customers).

Scope of work:

Independent Contractor Review Completed by:

\_\_\_\_\_  
Appropriate Administrator/Documented Designee

Approved     Denied