

## How to Complete the Independent Contractor Review Form

This form is to be completed by the Appropriate Administrator and/or Documented Designee in consultation with the contractor. 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.

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**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 a Sonoma State University [Special Consultant](#).

Contract Service Dates	Submitted by	Date Submitted
Name (Last, First, MI) ("Contractor")	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 yes, 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 receive instructions/training from the university? (Employees generally receive training from their employer, independent contractors typically determine their own work methods/set own priorities).
- ☐ ☐ 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).

Neither California State University system nor Sonoma State University prohibit simultaneous employment of relatives as long as the relatives report their relationship(s) and comply with the CSU/SSU Nepotism Policy. To ensure compliance, new employees and existing employees with new relationships must disclose them and agree not to vote, make recommendations or participate in any way with matters that may directly affect the selection, appointment, evaluation, retention, tenure, compensation, promotion, termination, other employment status or interest of an immediate family member.

Does the contractor have an immediate family member as defined in the [Nepotism Policy](#) employed by California State University or Sonoma State University? Yes No

If yes, please disclose the relationship here:

Name:

Relationship:

Name:

Relationship:

If the contractor believes that their relationship presents no conflict, please check this box: No Conflict

If the contractor believes there is potential for conflict, please elaborate below and a representative from Human Resources/ Faculty Affairs will follow up with the contractor to discuss how to best handle.

Scope of work:

Independent Contractor Review Completed by: \_\_\_\_\_  
Appropriate Administrator/Documented Designee

Approved ☐ Denied ☐ \_\_\_\_\_  
Human Resources Senior Director/Designee