

INDEPENDENT CONTRACTOR/CONSULTANT REQUEST

The requesting department should provide the Independent Contractor/Consultant Request information following the instructions provided within this document. The individual most familiar with the work being performed should provide the information.

I GENERAL INFORMATION

A. Individual's Name: _____

B. Individual's residency status for immigration purposes (check one):

- U.S. Citizen Lawful Permanent Resident Non-Resident (NRA) *

C. Funding: Non Grant Sponsored Project/Grant

* NOTE: Additional documentation is necessary for the University to make payment to an NRA.

If grant-funded, name of project and project number:

D. Department: _____ E. Department Contact: _____

II WORK WILL BE PERFORMED BY A NON U.S. CITIZEN (non-resident alien)

Answer this question if the individual who will complete this work is a non-resident alien (see Section I, Question B, above):

Yes No

Will the individual be completing ALL the required work outside the United States?

▶ If the answer is "No" continue to Section III of this document.

▶ If the answer is "Yes", skip sections III & IV and continue to Section V of this document.

III MULTIPLE RELATIONSHIPS WITH THE UNIVERSITY

Yes No

A. Does this individual currently perform similar work for the University (any campus, UM system or hospital) as an employee?

B. Is it currently expected that the University will hire this individual as an employee immediately following the termination of his or her independent contractor services?

C. During the 12 months prior to the date on which the independent contractor/consultant services will commence, did the individual have an official University appointment (including temporary) providing same or similar services?

D. Does the University pay as employees others who perform essentially the same duties that are to be performed by this individual

E. Does the individual only provide services to the University of Missouri and not offer his/her services to the general public as part of general public as part of a trade or business?

▶ If the answer is "No" to ALL questions III A - E, continue to section IV of this document

▶ If the answer is "Yes" to ANY question: **STOP**

This individual would be classified as an employee. Contact Human Resources to begin the hire process.

Completion of this Request is not necessary.

IV CLASSIFICATION GUIDELINES

▶ Complete section A, B or C depending on the type of services performed by the individual.

A. TEACHER / LECTURER / INSTRUCTOR

Yes No

1) Will the individual lecture at only a few class sessions and have no influence in assigning a grade or certifying the completion of a course?

2) Will the individual teach a course that is neither a degree prerequisite for students nor provides credit for a University degree?

3) Does or could the individual provide the same or similar services to other entities or to the general public as part of his/her trade or business?

▶ If the answer to EVERY question in Section IV-A (1-3) is "Yes", continue to Sections V and VI of this document.

▶ If the answer to ANY question in Section IV-A is "No", then complete IV-A-4 (the next question).

4) In performing instructional duties, will the individual primarily use course material or textbooks that are created, selected or provided by the individual or will the individual determine the course content or instructional sequence?

▶ If the answer to question 4 is "Yes", then complete sections V and VI of this document.

▶ If the answer to question 4 is "No": **STOP**

This individual would be classified as an employee. Contact Human Resources to begin the hire process.

Completion of this Request is not necessary.

>>> Section IV is continued on next page <<<

IV CLASSIFICATION GUIDELINES, continued

B. RESEARCHER

► **Select the Relationship 1 or 2 based on which description best describes the work being performed**

Relationship 1: The individual will perform research for a University professor or employee under an arrangement whereby the University professor or employee determines how the work will be performed.

► **If Relationship 1 best describes the situation: STOP**
This individual would be classified as an employee. Contact Human Resources to begin the hire process. Completion of this Request is not necessary.

Relationship 2: The individual will serve in an advisory or consulting capacity with a University professor or employee. The individual will be working 'with' the University professor in a collaborative type arrangement.

► **If Relationship 2 best describes the situation, please complete Sections V & VI of this document.**

C. SERVICES NOT COVERED UNDER SECTION A OR B Yes No

1) Will the University set the number of hours and/or days of the week that the individual is required to work as opposed to allowing the individual to set his/her own work schedule?

2) Does or could the individual provide the same or similar services to other entities or to the general public as part of his/her trade or business?

► **If the answer to question IV-C-2 is "Yes", skip the next question (IV-C-3) & complete sections V and VI of this Request.**

► **If the answer to question IV-C-2 is "No", go on to the next question (IV-C-3).**

3) Will the University provide the individual with specific instructions regarding performance of the required work rather than rely on the individual's expertise?

► **If the answer to questions IV-C-3 is "Yes": STOP**
This individual would be classified as an employee. Contact Human Resources to begin the hire process. Completion of this Request is not necessary.

► **If the answer to question IV-C-3 is "No", please complete sections V and VI of this Request.**

V SUPPLEMENTAL & CONTRACT INFORMATION

Yes No

A. Will the individual devote full-time to work for the University?

B. Has the individual invested in facilities or equipment needed to perform this work?

C. Will the University provide tools to complete the work other than specialized equipment?

D. Is the individual required to provide the services personally?

E. Will the University hire any assistants needed by the individual to perform these services?

F. List any training or meetings the individual is required to attend: _____

G. At what location(s) will the individual perform the services? _____

H. Performance period: Commencement Date: _____ Completion Date: _____

I. Contract price: _____
Services \$ _____ Type of pay : Commission Lump Sum Salary Hourly Wage
Travel \$ _____
Other \$ _____ Describe Other: _____
Total \$ _____

J. To be billed as (e.g. in full upon completion, 50% after first report, 50% after final report): _____

K. Invoices to be submitted for payment to: _____ Rolla, MO 65409-

L. Complete ATTACHMENT A. Please be thorough and complete. The information provided will become part of the contract.

M. Obtain the signatures required in Section VI of this document.

N. Submit the completed and signed documents to Business Services.

VI SIGNATURES AND CERTIFICATIONS

Signature: _____
(Individual requesting services) Date

Approved by: _____
Department Head Date

VP/VC Approval: _____
Vice Provost / Vice Chancellor Date

Reviewed/Approved for Contract: _____
Date

PERSONAL SERVICE CONTRACT INFORMATION
ATTACHMENT A - Description of work to be performed

Attachment to Personal Services Contract for: _____
name of contractor/consultant

Contractor/Consultant will be required to have a W-9 on file with the University prior to payment.
<http://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=3>

Reports to be submitted? Yes No If yes, due date(s) _____

Provide a detailed description of the work to be performed including due dates and other expectations.
Attach additional pages if necessary.