Independent Determination Contractor Required Info

- PROPOSED INDEPENDENT CONTRACTOR NAME
- BUSINESS NAME (if applicable)
- STREET ADDRESS
- CITY & STATE
- PHONE/EMAIL
- CHECK ONE:
    - Individual
    - Sole Proprietorship
    - Single Member LLC
    - Corporation
    - Partnership
- LICENSED?
    - Yes *IF YES, LICENSE #
    - No
- <mark>HAS PROPOSED IC BEEN AN EMPLOYED BY CSUSM CORP, CSU OR STATE AGENCY IN THE PAST 24 MONTHS</mark>?
    - **Yes-Not an IC, Special Consultant paperwork required-** https://www.csusm.edu/hr/employment/specialconsultant.htm
    - No

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- REQUESTOR NAME/TITLE/EMAIL
- DEPARTMENT
- DATE RANGE
- LUMP SUM AMOUNT SHALL NOT EXCEED
- CHARTFIELD-Account Fund Dept Class
- DETAIL DESCRIPTION OF SERVICES/JUSTIFICATION
- 5 W's- **WHAT**-event/program, **When**-date, **WHERE**-location, **WHY**-CSUSM business purpose**, WHO**- attendees
- QUESTIONNAIRE- 1-8 **NO**, 9-15 **YES**, 16-20 **NO**, 21-23 **YES**

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Info Needed:

- ❖ Scope of work/bid if available.
- ❖ **Payee Data Record-REQUIRED** https://adobesigndynamicworkflow.csusm.edu/ap
- ❖ **IC Determination:** https://www.csusm.edu/hr/employment/specialconsultant.html

❖ IC Agreement:
❖ https://www.csusm.edu/procurement/documents/procurementdocs/independent_contractor_agreement_1.20.23.pdf

Process

1. Quote from vendor
2. Payee Data https://adobesigndynamicworkflow.csusm.edu/ap (vendor email needed)
3. Independent Contractor Determination (send to HR-Chelsea Gruber) https://adobesigndynamicworkflow.csusm.edu/hr
4. Independent Contractor Agreement (signed by vendor) https://www.csusm.edu/procurement/documents/procurementdocs/independent_contractor_agreement_edits_1.20.23.pdf
5. Send Items 1-4 to SL budget analyst
6. Requisition for PO (processed by SL budget analyst) Submit requisition **no later than 10 working days** prior to the commencement of services with all required attachments and information.
7. Purchase Order (processed by Procurement)
8. Service provided by Vendor
9. Vendor Invoices after services have been rendered
10. Invoice paid by accounts payable

Procurement Instructions:
https://www.csusm.edu/procurement/documents/procurementdocs/instructions_for_submittal_ica_08.2023.pdf

IC Invoice Template:
https://www.csusm.edu/procurement/documents/procurementdocs/independent_contractor_invoice_template_9.18.23.pdf.pdf

Helpful Hints

Payee Data Tax ID and Entity type:
Individual /sole proprietor, social security # or LLC, they are an Independent Contractor. Corporation, FEIN #, they are **not** an IC. Do not send IC info to HR. Request quote and send to SL budget analyst.
Legal Business name on Payee Data needs to match name on IC forms.

LEGAL BUSINESS NAME (Including DBA if applicable) OR INDIVIDUAL/SOLE PROPRIETOR NAME/SINGLE MEMBER LLC (as shown on your income tax return). First, MI, Last
Roxy Wood

INDEPENDENT CONTRACTOR AGREEMENT

PURCHASE ORDER NUMBER	AM. NO.

THIS AGREEMENT, made and entered into this 29 day of June , 2023, in the State of California, by and between The Trustees of the California State University on behalf of California State University San Marcos (hereinafter called "CSU", "University", or "Party") and

CONTRACTOR'S NAME

Contractor Information:

Name: Roxy Wood

Remember –

- No Purchase Order, NO SERVICE!
- ALL services require a Purchase Order
- Quote BEFORE service, Invoice AFTER service
- Risk/Liability involved events-contact Risk Management (risk@csusm.edu)
- You cannot sign agreements/contracts on behalf of the University