

Carnegie Mellon

INDEPENDENT CONTRACTOR CHECKLIST (090707)

Name of Independent Contractor: _____
 Email address: _____

Tax Identification Number: _____
 (Social Security Number)

A. Are you a current or former employee of Carnegie Mellon? Yes No
 If yes, provide: Last date worked _____ Department _____

Compliance Checklist : Please "X" one block per question.	X	Independent Contractor Classification	X	Employee Classification
1. Will CM provide instructions or training on how the work is to be performed?	<input type="radio"/>	<i>As a Contractor receives only general directions and objectives of the scope of work/task</i>	<input type="radio"/>	<i>CM will provide detailed instructions and training</i>
2. Will CM provide facilities and furnishes equipment, materials, tools, and supplies?	<input type="radio"/>	<i>As a Contractor, I provide equipment, materials, tools and supplies and have a physical space, such as an office, at a location other than the University</i>	<input type="radio"/>	<i>CM provides workspace and furnishes equipment, materials, tools, and/or supplies</i>
3. Will you be working per a regular schedule at a set hourly rate?	<input type="radio"/>	<i>Paid per scope of work or task as outlined in the authorizing agreement/contract</i>	<input type="radio"/>	<i>CM pays a salary on a regular basis (hourly or monthly)</i>
4. Is your effort based on performance under a contract?	<input type="radio"/>	<i>Excluding the termination of agreement for convenience clause, my services cannot be terminated provided that I produce a result that meets the specifications outlined in the authorizing agreement. As the Contractor, I incur liability for non-delivery</i>	<input type="radio"/>	<i>CM has the right to discharge/terminate at any time as an employee</i>
5. Are your services part the University's curriculum ?	<input type="radio"/>	<i>As a Contractor, I do not offer education and/or research related services that are part of the University's curriculum.</i>	<input type="radio"/>	<i>As a Contractor, I provide education and/or research services which are part of the University's curriculum</i>
6. Is the continuation of your services fixed or dependent on the receipt of future agreements?	<input type="radio"/>	<i>A continuing relationship will be based on the award of future agreements/contracts and based on bids and specifications.</i>	<input type="radio"/>	<i>There is an anticipated regular and ongoing relationship between Contractor and CM</i>

B. Please describe the services that are to be provided to the University: _____

C. Please identify the current number of assistants or employees you have hired. _____

D. Do you expect that more than 50% of your annual income will be derived from CM? Yes No

E. Does the entity provide services to any other organization? Please provide the number of current customers _____

F. Are you, your spouse, your registered domestic partner, dependent child or partner (general or limited), an employee or regularly retained agent of Carnegie Mellon University (If "YES," please provide the following information below: Organization, Position, Name of Organization's Family Member and Nature of Business.) Yes No

G. Name of Carnegie Mellon University employee with whom you've been speaking: _____

Independent Contractor (Payee) Attestation and Certification

I understand that if I accept employment at Carnegie Mellon in the future, I must immediately notify the Controller's Office of the University. If Carnegie Mellon hires me as an independent contractor, I am responsible for taxes, insurance coverage, and business expenses and I am not eligible for any employer-provided benefits. I also certify that I have examined the answers to the above questions and that, to the best of my knowledge, they are accurate and complete. I further understand that an invoice must be submitted to initiate payment. I will contact Carnegie Mellon if there is a change in the data or relationship with the University.

 (Signature) Printed Name Title Date
 Please return completed form to: Procurement Services, 5000 Forbes Avenue, Pittsburgh, PA 15213 (Fax: 412-268-5306)