University Enterprises, Inc.
SACRAMENTO STATE

INDEPENDENT CONTRACTOR/CONSULTANT REQUEST FORM

A request for independent contractor or consultant services must be reviewed and approved by Sponsored Programs Administration before entering into an agreement with the provider.

Proposed Independent Contractor/Consultant:

Full Legal Name (First, Middle, Last):	
Business/Company Name (if applicable):	
Email:	Phone:
Address:	City, State, Zip:
Business Structure: ☐ Corporation/LLC ☐ Business operated by one or more owners (not incorporated)	
Business License: ☐ Yes ☐ No	License #:
City of Business Registration:	

Is this individual currently employed by University Enterprises, Inc. or the CSU system? ☐ Yes ☐ No

If yes, indicate the name of employer and department: _____

Is the individual a family member of/have an immediate relationship to project/project personnel? ☐ Yes ☐ No

Please complete sections A through C thoroughly. This information will assist with the employee vs. independent contractor determination and is for the development of an agreement, if approved.

A. Project Information:

Account Number:	Object Code:
Requestor Name:	Title:
Email:	Phone:
Project/Department:	

B. Description of Service(s):

Estimated Dates of Service: from to	Estimated Cost:
If > $5,000, provide CV, resume, etc. If the amount is >$10,000, additional information will be requested due to UEI 's purchasing policy.	
Is the work expected to be compensated on an hourly basis or per task/milestone/deliverable?	
Please provide additional pages answering all questions below.	
1. Please include a detailed scope of work for the services that are to be provided.	
2. Why is there a need for these services and how does the individual/business meet the need?	
3. What percent of the projects overall deliverables will be provided by the individual/business? %	
4. Please describe why the services being provided are not available with current staffing or through campus resources.	
5. Please describe the individual's/entity's anticipated deliverables (products created as a result, tangible or intangible) with due dates.	
6. Does the work classify as Creative Work(s)? Creative Work is a product of creative expression, such as literature, music, art, and graphic designs that is protected by copyright law. It must be original, presented in a fixed medium, and involve some level of creativity in its creation. ☐ Yes ☐ No	

C. Independent Contractor/Consultant Questionnaire*

1. Who will the worker report to and how often?
2. Will you instruct or supervise the person while they're working, or are they free to independently decide how to do the work?
3. Does the worker have the ability to set their own hours of when they will perform the work? ☐ Yes ☐ No
4. What academic degrees and/or professional licenses does the worker have (if any)?
5. Where will the worker perform the services being contracted for?
6. Does the worker have customers for whom the worker performs these services for compensation as part of their business? ☐ Yes ☐ No
7. Will the worker furnish their own tools, equipment, or supplies used to perform the work? ☐ Yes ☐ No
8. Can the worker be discharged at will, without cause (before project is completed)? ☐ Yes ☐ No
9. Does the worker advertise that the worker is available to perform these services for others? ☐ Yes ☐ No *If yes, please attach a copy of any advertisement (in print format) or identify where such advertisements can be found.*

* For inquiries regarding Section C, please contact your Compliance & Grant Analyst

I am requesting a review of the proposed independent contractor/consultant for services and certify that University resources are not available to provide this service.

PI/PD Name & Title	Signature	Date

The account and object code listed are correct, and the proposed service is an allowable expense. Determination can proceed.

Compliance & Grants Analyst Name	Signature	Date

UEI use only

PEID:

Determination: ☐ IC ☐ Employee	Date:	Initial:
If Employee – Date sent to HR:		
Notes:		
Date	PEID: ☐ Yes ☐ No TRANS RPT: ☐ Yes ☐ No ☐ N/A PY RPT: ☐ Yes ☐ No SAM RPT: ☐ Yes ☐ No	