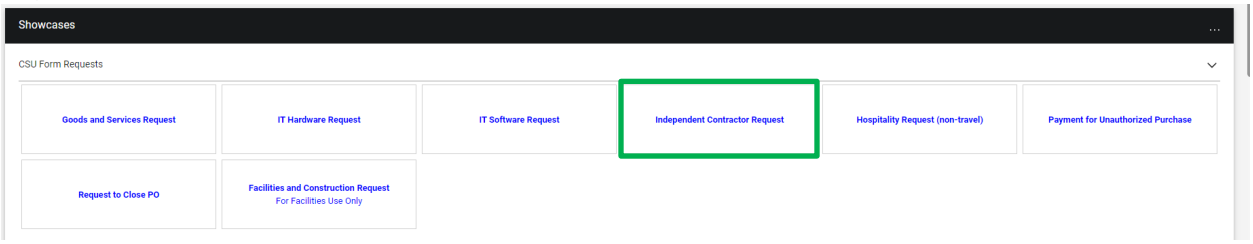
California State University
SAN MARCOS

Procurement & Contracts

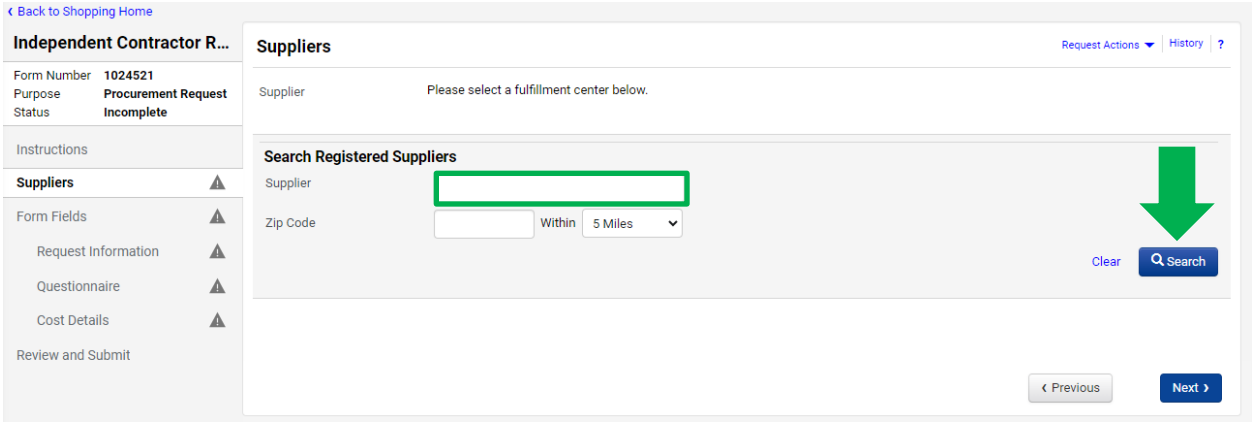
INSTRUCTIONS FOR SUBMITTAL OF THE INDEPENDENT CONTRACTOR FORM REQUEST

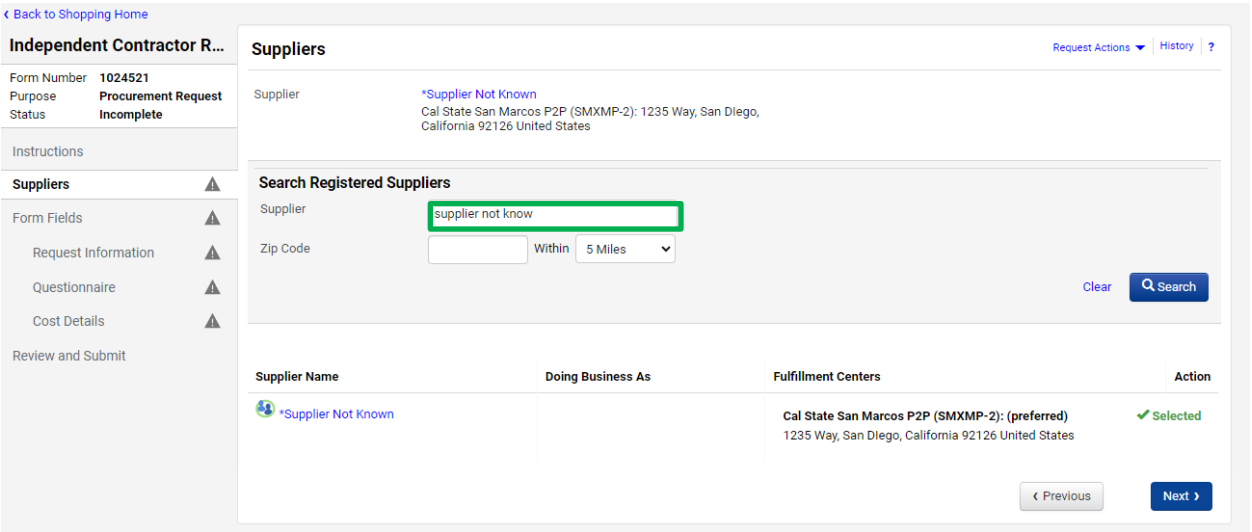
A. INSTRUCTIONS FOR SUBMITTAL BY REQUESTOR:

1. Read this document thoroughly as it may have changed since you last used the process.
2. The HR Consultant/Contractor Determination process is now in the CSUBUY P2P System.
3. Log into CSUBUY and scroll down to Showcases. Choose the Independent Contractor Form.



4. Search for your Supplier in the system. If your Supplier cannot be found, Request that they be added and wait until they are in the system to enter the requisition or proceed with "Supplier Not Known." Note that if you choose Supplier Not Known, you will need to inform Procurement via Requisition Comments when the supplier is set up and provide the supplier number at that time.





5. Complete the Request information (IC type, Service Start Date, Service End Date, Questionnaire, etc.)
6. Complete the Scope of Services document and attach it to the Independent Contractor Form/Requisition.
7. Submit the Form/Requisition.
8. The Requisition will route to HR for review to determine if it may move forward as an Independent Contractor through Procurement.
9. If HR determines that the service provider should be hired through HR as a Special Consultant or Casual Worker, HR will add a comment indicating that it should follow one of those hiring paths. HR will Reject the Form, and it will not move on to the Procurement review.
10. If HR approves the service provider to be hired through Procurement as an IC, they will Approve the requisition to move to the Procurement Review Step. If a background check is required, HR will indicate that a background check is required, along with what type of background check.
11. If the Form is approved by HR, please complete the following steps:
    a. Look at whether a background check is required. If it is, please have the service provider sign the Background Check Compliance Statement. Please follow any other instructions from HR, if applicable (for example, Live Scan). Please work with Procurement to submit the Background Check Compliance Statement.
    b. If the supplier is not already set up in CSUBUY for our campus, please initiate a supplier request. When the supplier is set up, please let Procurement know via Comments and provide the supplier number.
12. Depending on the services, the Form/Requisition will move to additional review steps that are needed and Procurement review.
13. Procurement will process the requisition and Approve it into a Purchase Order. The Purchase Order will be sent to the supplier, and the Requestor will receive a notification that the Purchase Order is approved.
14. **Submit the Independent Contractor Form no later than 20 working days prior to the anticipated commencement of services with all required attachments and information**.
15. IC or Requestor will submit an invoice to Accounts Payable in accordance with the ICA.
16. Accounts Payable will remit payment.
17. In the event that the nature of the services is changed, the compensation is changed, or the term is extended, please contact Procurement to create an amendment for the ICA.

Note: Non-US Citizen or Permanent Resident Alien: The Office of Global Education must be contacted prior to completing the agreement and requisition in order to verify eligibility to receive payment for services. Additional forms may be required for supplier setup.

Note: Please plan your purchase with adequate time for HR review, supplier setup, and PO processing through Procurement. Late submittals may require that the services or event be rescheduled to allow time for the supplier setup and issuance of a Purchase Order.