

## CHECKLIST FOR HIRING INDEPENDENT CONTRACTORS/CONSULTANTS

1. Complete the “Loyola University Maryland Independent Contractor/Consultant Requisition Form”, obtaining approval by the Vice President of your respective department/division.
2. Send the completed “Loyola University Maryland Independent Contractor/Consultant Requisition Form” to Human Resources for final verification and approval of determination of employee vs. independent contractor. Once approved by Human Resources, the process for engagement of the individual is as follows:
  - x For engaging an individual as an employee, please see the requirements and procedures found in the Loyola University Maryland Policy Manual
  - x For engaging an individual as an independent contractor, first ensure all conditions are met that are noted within the Independent Contractor/Consultant Policy” (page 3). When all conditions are met the following procedures must be followed:
    - 9 Complete the standard Loyola University Maryland Confidentiality Agreement and send to Human Resources.
    - 9 Complete and send the Loyola University Maryland Consultant Agreement to the independent contractor/consultant for their signature. The department/division representative should ~~send the~~ complete agreement and send the original documents to Human Resources. Please note that Consultant Agreements are not required for Standard Services and the University’s Bid Requirements/Sole Source policy should be followed for procuring services.
    - 9 If appropriate, attach required documentation on competitive bids received or documentation for sole source procurement according to the “Competitive Bid Requirements” set forth in the University’s Bid Requirements/Sole Source policy.

- 9 Route documentation through the required signature authorities for your department/division, following the University's Signature Authorization Policy.
- 9 Upon approval of the Loyola University Maryland Consultant Agreement, all independent contractors/consultants requiring access (building and/or University systems) the Non-Employee Account Access form should be completed.
  - a. For independent contractors/consultants needing an ID card only, the form should be submitted to Student Administrative Services.
  - b. For independent contractors/consultants needing an ID card and system access (i.e. computer log in, email, portal access) the form should be sent to Human Resources. To obtain an ID card and system access, the Loyola University Maryland Confidentiality Agreement must accompany the request for Non-Employee Account Access form.
- 9 First-time vendors to the University must complete Vendor Information Form W9, which should be submitted to the Accounts Payable office along with the Payment for Services Request Form.
- 9 Work may commence upon internal approval, receipt of the signed Consultant Agreement and receipt of the Vendor Information Form. Invoices from the independent contractor/consultant are processed using Financial Services "Payment for Services" procedures.