

# UNIVERSITY OF FLORIDA CONSULTING & PROFESSIONAL SERVICES WORKSHEET - Page 1 of 2

## INSTRUCTIONS:

Complete only if seeking to contract or pay for consulting or professional services. If you are hiring an individual, it is important to establish that the nature of the service does not constitute an employee/employer relationship. The Independent Contractor Questions are important to both UF and the prospective payee to enable proper tax income withholding and reporting in accordance with the IRS. Please complete these questions carefully with the prospective payee's cooperation and their understanding.

**Collection and Use of Social Security Number** - The request for your SSN or other Taxpayer Identification Number by UF Finance and Accounting is mandated by 26 U.S.C. 6041 and related IRS regulations. If you have questions about the collection and use of Social Security numbers at UF, please visit: <http://privacy.ufl.edu/SSNPrivacy.html>

Individual     Corporation / Government\*\*     Partnership     Non-Profit

\*\* If you checked Corporation / Government, the Independent Contractor questions do not have to be completed.

Payee Name \_\_\_\_\_ FEID or Soc. Sec No. or ITIN \_\_\_\_\_

Payee Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Residency Status:**     I am a U.S. citizen or permanent U.S. resident     I am a foreign national

**Minority Status:**     Non-minority     Non-certified minority     Certified minority Certified by: \_\_\_\_\_  
 African-American     Hispanic     Asian/Hawaiian     Native-American

**Women owned Status:**     Woman-owned     Non-certified     Certified    Certified by: \_\_\_\_\_

**Independent Contractor Questions** If you have questions regarding the payment classification, contact University Tax Services at (352) 392-1324. Yes answers generally indicate an employment relationship. (Except for question #9 & #10)

- Yes     No    1. Is or was the payee a University of Florida employee at any time during this calendar year? (If yes, pay as employee only.)
- Yes     No    2. Are the services of the individual integrated into your organization? For example, are you hiring someone to teach full-time or part time, or are you hiring someone to proctor an examination? (If yes, pay as an employee only)
- Yes     No    3. Is the UF Dept. providing long-term assistance to the individual such as additional personnel support, supplies, equipment, etc.?
- Yes     No    4. Is the UF Dept. providing on-going training and direction concerning how to complete the task? For example, is the payee receiving more than general directions and the objectives of the task?
- Yes     No    5. Does the prospective payee/independent contractor report to a UF staff member who has the right to change HOW the individual does their work? (An independent contractor normally must meet standards defined in a contract and is not directly supervised by a UF employee.)
- Yes     No    6. Is there a regular or on-going relationship with the prospective payee/independent contractor? For example, are you hiring the individual for more than a one-time task?
- Yes     No    7. Is the prospective payee/independent contractor using experience or expertise gained as a current or previous employee of the University of Florida to provide the independent contractor service?
- Yes     No    8. Can the independent contractor quit prior to completion of the project without incurring any legal liability? **A YES for research participants is an acceptable answer for payment as an independent contractor.**
- Yes     No    9. Does the prospective payee/independent contractor offer their professional or consulting services to other organizations?
- Yes     No    10. Does the prospective payee/independent contractor maintain an independent office?
- Yes     No    11. Is the prospective employee/independent contractor a retired employee training their replacement?
- Yes     No    12. Is the prospective employee/independent contractor a former or retired employee performing the same or similar services as performed in their previous job at UF?

