

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.

This form must accompany the Purchase Requisition (or supplied as supporting documentation to an unencumbered voucher if a Purchase Requisition is not required).

Business Unit _____ Requisition # _____

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 a credit course? (Normally performed by UF employees.)
- 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?

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

If the payee is a **foreign national** and both the department and payee agree there is no employee/employer relationship you must complete the following **requirements for payments** to non-resident aliens, IRS Form W-8 BEN, Foreign National Tax Information Form, and obtain approval from University Tax Services.

I agree with the statements made above by the approving payer, the Dean, Director, or Chairperson, employed with the University of Florida. Furthermore, I understand that as an independent contractor, I am not covered under the State of Florida Worker's Compensation Law (F.S. 440) and it is my responsibility to obtain personal liability insurance. Furthermore, **I am a U.S. citizen or permanent resident of the U.S. or a nonresident alien** and the address and social security number or FEID above is correct. I understand that this is taxable income to me and that I am required to report this income on my U.S. Tax Return annually.

NOTE: Section 837.06 of the Florida Statutes provides that a person who knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his/her official duty shall be guilty of a **Misdemeanor of the second degree**, punishable as provided in Section 775.082 or 775.083, Florida Statutes.

ANY TAXES, INTEREST OR PENALTIES ASSESSED AGAINST THE UNIVERSITY OF FLORIDA BY THE IRS DUE TO MISCLASSIFICATION OF AN INDIVIDUAL AS AN INDEPENDENT CONTRACTOR WILL BE PAID BY THE DEPARTMENT AUTHORIZING THE CONTRACTUAL RELATIONSHIP.

Payee Signature (Must be Payee Named Above)

Phone

Date

Univ. of FL Department

Univ. of FL Dean, Director, Chairperson Name or Designee

Signature

Date

Account codes for disbursements for which a Form 1099 Misc. will be issued: 71 ****

Return this form to:

To add the vendor to the PeopleSoft vendor file:
Vendor Maintenance
Fax: 352-392-0081

AND

To ensure the requisition becomes a Purchase Order:
Purchasing
PO Box 115250
Fax: 352-392-8837