



INDEPENDENT CONTRACTOR AGREEMENT PROCEDURE

Overview

Independent Contractor Agreements should be used when contracting with a service agency or with an individual for services or consultation and the person is not a JUHSD employee or retiree. These agreements should not be used for any individuals who routinely provide services for JUHSD, these individuals should be hired through the payroll process (see Employment Determination Guide at http://www.edd.ca.gov/pdf_pub_ctr/de38.pdf).

Process

Requestor

1. Prepares the Agreement using the JUHSD Independent Contractor Agreement Template (available from the Business Office Accounting Technician), completing all highlighted sections:
 - a. Contractor's Name and Address
 - b. Contract Term (should begin after Board approval date) – the contract term should not be more than 12 months and must be renewed annually, if continuing
 - c. Payments – include only the total amount or the “amount not to exceed” that will be paid over the fiscal year in this section
 - d. Insurances – check the appropriate boxes as instructed on the template AND obtains proof of insurance from the Contractor (Requestor may ask Business Office for assistance with securing these documents)
 - e. Name & Title of the Administrator approving the contract (must be Superintendent or Associate Superintendent, do not sign until Board approved)
 - f. Exhibit A – enter the Contractor's name at the top
 - i. Description of services – outline the specific work to be done
 - ii. Amount and Method of Payment – restate the amount to be paid and outline the expected terms of payment (i.e., monthly invoices to be paid upon receipt, or net 30 upon completion of work, etc.)
 - iii. Name of the District Office Administrator authorizing the contract
 - iv. Board Approval Date (if known, this may be completed by Business Office Staff)
 - v. Accounting String for payment
 - g. Fingerprint/Background Check & TB Certification, complete the Contractor Name and a brief statement of services on the top of both forms

NOTE: If the individual requests any changes to the language, it should be reviewed by the Associate Superintendent of Business Services

2. Saves the completed template as “Short Name of Contractor Fiscal Year”(i.e., “BSmith 16-17”, or “ABC Inc 16-17”) and emails the word document to the Accounting Technician
3. After receiving an Agreement Number, submits a Purchase Order (PO) for the entire amount of the contract, referencing the Agreement Number
4. Prepares a Board Item for contracts \$50,000 and above

Accounting Technician

5. Assigns an Agreement No. (year-sequence, such as 2017-001) and communicates that number to the Requestor
6. Reviews all contracts to ensure the necessary information is included and follows up on missing items
7. Prepares the Board Item for contracts under \$50,000 (submitting the prepared item to the Business Office Admin Assistant for uploading to Agenda Online before each Board meeting)
8. Prints a hard copy of agreement, mails it to Contractor for signatures, and includes a W-9 form for completion by Contractors that do not have a Tax ID#
9. Once Board approved, obtains administrator's signature, makes two copies and distributes as follows:
 - a. Original to Accounts Payable, to be filed in the vendor folder
 - b. One copy to Requester
 - c. One copy to Contractor