

Employee/Independent Contractor Checklist

For internal use – to be completed by UFV department or Research Office



Please complete this checklist prior to entering into a provision of service contract or a service agreement. If you have questions on making the Employer/Independent Contractor determination, please consult your financial analyst liaison | finance.liaisons@ufv.ca.

Worker or contractor's name (or business name):		
	Agree	Disagree
The work is not included in a collective or association agreement (FSA).	☐	☐
The worker is not an employee of the university in a similar field as needed in this assignment.	☐	☐
Work is compensated based on defined outcomes or deliverables, with the university not directing how the work is performed. Payment is based on the completed deliverable rather than hours worked.	☐	☐
The worker has an incorporated company with a registered Canadian business number and/or has a GST number, charges GST and is not completing work normally done by the university.	☐	☐
The worker operates their own business or provides similar services to other clients.	☐	☐
The worker has their own business insurance and WCB coverage.	☐	☐
The university does not direct the methods, processes, or means used to complete the work. The relationship is one of independent service provision, not supervision or subordination.	☐	☐
The university does not control the worker with respect to the results of the work or method used to complete the work.	☐	☐
The worker does not require permission to work for other companies while working for this university.	☐	☐
Where the work schedule is irregular, the university is not necessarily a priority on the worker's time.	☐	☐
The worker determines all tasks they will perform to fulfill the work obligations. The university has no or limited control in the tasks.	☐	☐
The worker receives no training or direction from the university on how to do the work.	☐	☐
The worker does not have a university employee supervising them and they set their own hours to complete tasks without direction from the university.	☐	☐
The worker is usually free to work when and for whom they choose and may provide their services to different companies at the same time.	☐	☐
The worker can accept or refuse work from the university.	☐	☐
The working relationship between the university and the worker does not present a degree of continuity, loyalty, security, subordination, or integration, all of which are generally associated with an employer-employee relationship.	☐	☐
The worker supplies most of the tools and equipment required to complete the work. In addition, the worker is responsible for repair, maintenance and insurance costs.	☐	☐
The worker has investments in tools and equipment needed for their business and they retain the right over the use of these assets.	☐	☐
The worker uses their own workspace to perform a substantial amount of the work. The worker incurs expenses related to the operation of the workspace that are not reimbursed by the university.	☐	☐
The worker has control to retain helpers or assistants to complete the university's tasks. The university work does not have to be completed by them personally.	☐	☐
The worker is responsible for the costs associated with subcontracting and assistants.	☐	☐
The worker is responsible for all operating expenses.	☐	☐
The worker is financially liable if they do not fulfill the obligations of the contract.	☐	☐
The worker determines and controls the method and amount of pay.	☐	☐
The worker has no expectation of receiving protection or benefits from the university (WCB, EI, CCP, pension, etc.).	☐	☐
The worker has the risk of profit or loss resulting from the assignment.	☐	☐
The worker has an active business presence where they advertise their services, actively market themselves and search for clients.	☐	☐
The worker has a capital investment in the business.	☐	☐
The worker manages their staff and work projects.	☐	☐
Proceed to page 2 to complete contract		

Conclusion

Add the total number of checkmarks for each column. If you answered predominantly (15 or greater) in the “disagree” column, the it is likely* that the worker would be viewed as an employee by CRA.

Next steps

Sign below indicating your initial determination of the workers’ status. Complete a provision of service contract or service agreement (incorporated or unincorporated). When you have received your initial invoice, submit the following to Accounts Payable | acctspayable@ufv.ca:

- Completed (draft) provision of service contract or service agreement
- Initial invoice
- Completed employee/independent contractor checklist

*This is a guide only – CRA is the ultimate deciding authority in all situations.

Determination of worker status: Employee Contractor

Completed by:

Name

Signature

Date