

Independent Contractor Process

Overview

The School of Government at the University of North Carolina at Chapel Hill (SOG) works to improve the lives of North Carolinians by engaging in practical scholarship that helps public officials and citizens understand and improve state and local government. As the largest university-based local government training, advisory, and research organization in the United States, the UNC School of Government offers more than 200 courses, webinars, and specialized conferences for more than 12,000 public officials each year.

The SOG recognizes the importance of independent contractors in carrying out our mission. Read below for more information on what to expect when hiring an independent contractor to work with the School.

What to Expect

Below, you will find information about required paperwork that will need to be completed before work can begin, as well as key details about providing services and receiving payment:

Independent Contractor form: This form will be initiated by SOG Business Office and sent via Docusign, to be completed by the following individuals:

- **Independent Contractor** – verifies general information, provides contact information and completes a compliance questionnaire.
- **Department Contact** – completes general information about the engagement. If the contractor should be reimbursed for expenses, such as for travel or for supplies, this should also be notated on the form by providing an estimate of total expenses.
- **SOG Business Office** – reviews provided information and submits to UNC Purchasing for review.
- **UNC Purchasing/Vendor Management** – reviews provided information and provides final approval.

Vendor Registration Forms: The SOG Business Office will invite the independent contractor to complete a vendor profile on UNC's vendor management system, [PaymentWorks](#), via an automated email from PaymentWorks.

- This includes providing information requested on a federal W-9 and banking information for ACH payment. **Enrollment in PaymentWorks, including ACH information for payment, is required.**
- For help, see: [Creating a PaymentWorks Account](#) or contact vendor_coordinator@unc.edu

Additional Information/Forms: additional information or forms may be requested, depending on the circumstances. Required forms are indicated below.

- Background Check** is required if:
 - There is or will be repeated work (more than one engagement in a fiscal year), the work assignment is more than 10 days, the work includes access to sensitive populations, or to confidential or protected data.
 - *If required, the independent contractor will receive a contingent offer and will be invited (via email) to complete a background check through the University's background check provider. This email will come from backgroundcheck@unc.edu.*
- Data Protection Checklist** is required if services require access to data. A Data Governance review may be required if the data is categorized as [sensitive data](#).
 - *If required, the SOG Business Office will send the Data Protection Checklist to the Department Contact and coordinate its completion with the SOG IT Department.*
- Master Service Agreement & Statement of Work** are required if service fee exceeds \$10,000. *If required, the SOG Business Office will send these forms via Docusign, to be completed and signed by the independent contractor and Department Contact.*
- Waiver of Competition** is required if service fee exceeds \$10,000. *If required, the SOG Business Office will send these forms via Docusign, to be completed and signed by the Department Contact.*

Providing Services: Work can only begin when all paperwork indicated above has been submitted and approved by the UNC Purchasing office. The departmental contact should work with the independent contractor to confirm approval and details of the engagement, such as timing, reporting requirements, etc.

- **If reimbursement for travel is required**, please note the following:
 - Mileage is reimbursed at federal rates, which are currently \$0.70/ mile up to 350 miles, and \$0.35 after 350 miles. A map is required for reimbursement.
 - Meals will be reimbursed using federal per diem rates, which depend on dates of travel and location. Per diem rates are subject to review and approval by the UNC Purchasing Office. No alcohol will be reimbursed.
 - Other expenses, including car rentals, ride services, parking, etc. will require itemized receipts to be approved for reimbursement.

Payment:

- Payment will be made according to the agreed upon schedule, typically after work is complete, and **upon receipt of an invoice.**
- **The independent contractor should submit invoice(s) to their department contact.**
 - Include an itemized list of expenses to be reimbursed in the invoice, or use the [SOG Non-Employee Travel Reimbursement Form](#) to provide these details. Receipts and map for mileage must also be included.
- When the invoice and all supporting documentation have been received, the SOG will initiate a payment request. **All payments from UNC are made via ACH.**