

Short-Term Services Procedures

1. Complete the Short Term Services Checklist
2. Determine whether the individual will be paid as an INDEPENDENT CONTRACTOR (Commercial Warrant) or as an EMPLOYEE (Payroll Warrant)
 - a. Generally, all of the following criteria must be met for the individual to be paid as an Independent Contractor:
 - i. **A**part: The worker performs work that is outside, or **apart** from, the usual course of the District's business, regardless of where the work occurs
 - ii. **B**usiness: The worker is customarily engaged in an independently established trade, occupation, or **business** of the same nature as the work performed for the District
 - iii. **C**ontrol: The worker is free from **control** and direction of the District in connection with the performance of the work, both under the contract for performance of work and in fact
 - b. If EMPLOYEE: Submit to Human Resources
 - i. Complete an Employment Short Term Services Agreement
 1. Submit with checklist to **Human Resources** at least 2 weeks prior to the Board meeting
 2. Agreement must be Board approved PRIOR to the first date of services to be rendered
 3. Ensure proper certificated credentials, if applicable, have been issued by CTC via <https://www.ctc.ca.gov/> -- search for an Educator under the Employers tab
 - ii. INDIVIDUAL must complete and submit a Federal W-4 and State DE-4 form to Payroll before a Payroll Warrant can be issued for payment
 1. If INDIVIDUAL is a certificated retiree, they must also provide a Form I-30 completed by their physician (Form I-30 can be found on the Human Resources webpage)
 - iii. INDIVIDUAL must complete and submit a monthly timesheet approved by the Administrator to Payroll for payment
 - c. If INDEPENDENT CONTRACTOR: Submit to Business Services
 - i. If Services are for an assembly, training, presentation, or only to be rendered on a few specified dates ("LIMITED"), complete a Limited General Services Agreement
 - ii. If Services are not LIMITED, as defined above, and are not SPECIALIZED SERVICES, as defined below, complete a General Services Agreement
 - iii. If Services are SPECIALIZED SERVICES (i.e. of a highly specialized and technical nature in connection with certain financial, economic, accounting, engineering, legal, or administrative matters) complete a Professional Services Agreement or similar vendor provided agreement
 - iv. CONTRACTOR must also complete the Supplementary Information for Service Provider form
 - v. Agreement, Checklist, and Supplementary Information form must be submitted to **Business Services** at least 2 weeks prior to the Board meeting and must be Board approved PRIOR to the first date of services to be rendered
 - vi. CONTRACTOR must submit a Federal W-9 form to Accounts Payable before a Commercial Warrant can be issued for payment
 - vii. CONTRACTOR must submit an invoice approved by the Administrator to Accounts Payable for payment