

# Worker Classification Review

Date: \_\_\_\_\_

New Request

Renewal Request

## Worker Information

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_

DBA (if applicable): \_\_\_\_\_

Social Security Number (SSN) or Federal Employment ID Number (FEIN): \_\_\_\_\_

Are you a current or previous employee of RIT?      Yes      No

If yes, check all that apply:      Full-time      Part-time      Faculty      Student      Temp

If yes, please provide a brief explanation:

## Scope of Work

Will work be performed on RIT's campus?      Yes      No

Will RIT equipment/supplies be used?      Yes      No

Period of Performance:      Start Date: \_\_\_\_\_      End Date: \_\_\_\_\_

Rate of Pay (based on project milestones or per hour): \_\_\_\_\_

Estimated Annual Spend (Not to exceed dollar amount): \_\_\_\_\_

Provide a brief description and specific key deliverables for this engagement

Is it expected the University will hire you as an employee upon conclusion of the proposed service?      Yes      No

## Internal Revenue Service Classification Factors Checklist

### IRS Classification Table

*A. Behavioral Control: Right to direct and control details and means by which worker performs services.*

|             |                                                                                                  |     |    |
|-------------|--------------------------------------------------------------------------------------------------|-----|----|
| Instruction | Will the department give you instructions as to when, where, and how you are to perform the job? | Yes | No |
| Training    | Will you receive training from the University?                                                   | Yes | No |

*B. Financial Control: Right to direct and control economic aspects of the worker's activities.*

|                        |                                                                                                                          |     |    |
|------------------------|--------------------------------------------------------------------------------------------------------------------------|-----|----|
| Significant Investment | Have you invested in facilities such as an office or equipment to perform the proposed services to commercial clientele? | Yes | No |
| Payment of Expenses    | Will the University pay your business travel expenses in addition to the rate/fee?                                       | Yes | No |
| Services Available     | Do you make your services available to other businesses?                                                                 | Yes | No |
| Incremental Payment    | Will the University pay you by the hour, week, or month rather than by the job?                                          | Yes | No |
| Risk of Profit/Loss    | Will you bear the risk of making a profit or losing money under this arrangement?                                        | Yes | No |

*C. Financial Control: Right to direct and control economic aspects of the worker's activities.*

|                             |                                                                                                                     |     |    |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------|-----|----|
| Regular University Business | Is the work to be performed part of the regular business of the University: teaching, research, and public service? | Yes | No |
| Individual Status           | Will you receive any employee benefits?                                                                             | Yes | No |
|                             | Will you hire and supervise other persons on behalf of the University?                                              | Yes | No |
|                             | Is it a condition of the agreement you personally provide service to the University?                                | Yes | No |
| Control of Individual       | Can you terminate your relationship at any time without incurring any personal liability?                           | Yes | No |
|                             | Will you be submitting regular oral/written reports to the University, other than status updates?                   | Yes | No |
|                             | Will a University employee provide ongoing supervision to you?                                                      | Yes | No |
|                             | Is the University entitled to withhold payment for unsatisfactory work?                                             | Yes | No |
|                             | Will you have to follow University scheduled hours of work?                                                         | Yes | No |

What type of advertising do you do for your services (e.g. business cards, website, etc.)?  
Provide the website URL if available: