

## About the Document

<b>name</b>	<b>PC-HR-1590-M. Independent Contractor Agreement</b>
<b>owner</b>	HR
<b>access &amp; use</b>	Restricted to HR
<b>what it is</b>	A contractual agreement between the Company and an independent contractor, consultant, or legal entity that establishes the scope of work and terms and conditions of the engagement.
<b>who uses it</b>	HR or anyone with authority to enter into a contractual agreement on behalf of the Company.
<b>used with</b>	<ul style="list-style-type: none"> <li>◆ <i>PC-MGR-1580-M. Offer Form</i></li> <li>◆ <i>PC-ALL-1585-R. Staff Policies Manual</i></li> <li>◆ <i>PC-ALL-1107/1122/1132-R. Terms &amp; Definitions Addendum</i></li> </ul>

## Why This Process is Important

It's crucial that anyone who provides services to the Company enters into a formal Agreement with the Company to acknowledge that they have read, understand, and agree to abide by the terms and conditions of their engagement. These terms and conditions clarify the detailed scope of work and help protect the Company.

## Working with the Document

- ◆ Gray shaded form fields are input placeholders. To replace the text in these form fields, click **ONCE** on the field and type your new content.
- ◆ The agreement is structured so that most components up to the signature block are standard and any specifics are included in Schedule A.
- ◆ The highlighted sections reference clause numbers. If you add or delete clauses, ensure that the highlighted clauses reference the appropriate clause number.

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### Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

#### Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

#### Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



### Create HR for Clients

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

7. Change the information in the footer. It's important that the contract shows the total number of pages.

Independent Contractor Agreement – <Contractor Name and their company name if applicable> and <Company Name>

<Page # of #>

8. Save the agreement.
9. If you create multiple versions of a contract, save each version with the revision date at the end of the file name. This ensures you can review the document history at any time. File all previous versions of the file in the WIP folder.
10. If the agreement needs to be reviewed prior to signing, send the reviewer an email. This email may include the following content:

- Kindly review draft **insert document revision #** of **contractor name's** Independent Contractor Agreement.
- If you would like to make edits or insert comments, please do not override the current document. Save a new copy of the file and add your initials at the end of the file name. For example: *2017-02-27-Jane-Doe-Contractor-Agreement-Draft-Feb05-PJ*
- Kindly turn on the Tracking functionality in Word so that I can review your changes to ensure that they do not modify the legalese. (**Review** tab > **Track Changes**)
- By **insert date**, please reply to this email and provide me with confirmation to proceed with the agreement, or attach your edited file.

11. If the Reviewer makes edits:

- a. Save their document and add your initials at the end of the file name after the editor initials.

For example: *2017-02-27-Jane-Doe-Contractor-Agreement-Draft-Feb05-PJ-Feb06-AL*

- b. Review the Reviewer's changes. Accept or reject their changes or discuss the changes with them if you don't agree or have other suggestions.

**\*\* Remember, it's your responsibility to ensure that the agreement is contractually sound and that it reflects HR best practices. Your role is to provide HR expertise. If you feel the Reviewer is insisting on making changes that you don't agree with from an HR best practices perspective, talk to your manager.**

12. You may create several versions of the document until a final contract is created. Keep any revisions or agreement versions in the WIP folder within the employee folder.
13. Save the final agreement and remove all revisions extensions. The final file name should look like this: *ContractorStartDate>-<ContractorFirstName-LastName>-Independent-Contractor-Agreement*

For example: *2017-02-27-Jane-Doe-Independent-Contractor-Agreement*

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Please find attached the following documents representing the terms and conditions of your engagement, which become valid and binding once you have confirmed acceptance of them – including by electronic form and by return email:

- ◆ **Independent Contractor Agreement**  
Requires a signature
- ◆ **Staff Policies Manual**  
For reference. Outlines the Company’s general engagement conditions and conduct policies for Office Staff that are signed off as part of the Independent Contractor Agreement.
- ◆ **Terms & Definitions Addendum**  
For reference. To be read together with the Staff Policies Manual. It outlines the formal terms used in the Manual and their definitions.

If you accept this offer and its terms and conditions, kindly:

1. Print the Independent Contractor Agreement.
2. Provide the required signatures in the signature boxes. Be sure to include a witness signature.
3. Initial every page in the lower right corner, including SCHEDULE A, and SCHEDULE B.
4. Scan and return all pages of the Independent Contractor Agreement by end of day **Insert Date**, preferably 4 business days from date of sending offer, at which time the offer outlined in this email expires.
5. Please ensure that:
  - The entire Agreement is included in the scanned copy.
  - The quality of the reproduction is clearly legible.
  - Initials are visible.

If you have any questions about the details of this offer, please do not hesitate to contact me by email.

**First Name**, we are very much looking forward to working with you.

Sincerely,

**CUSTOMIZER: Insert Legal Entity Name**

**Your Name**

**Your Title**

**IMPORTANT NOTICE:** This email is intended only for the use of the individual or entity to which it is addressed, and may contain information that is privileged, confidential and exempt from disclosure under applicable law. If the reader of this message is not the intended recipient, or the employee or agent responsible for delivering the message to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, you are asked to permanently delete all copies of this email and notify the sender immediately. Thank you.

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