



ONBOARDING PROCESS FOR 1099 EMPLOYEES

1099 Onboarding Process –Responsibilities of "Company Name" & 1099

Hiring Manager Responsibilities

1. **Hiring Manager responsible for sending** a completed 1099 Employee Requisition along with a *Résumé* to HR at hr@yourcompan.com with a copy to joe@yourcomp.com in order to process quickly. The Requisition includes the following information:
 - Date Required
 - Reason for Requisition
 - Project Requirements, such as client name & location, project manager assigned, hours & rate
 - Contact information of 1099 Employee – if using a Referral
 - Authorization Name & Signature
2. **Hiring Manager responsible for:**
 - Setting up Handoff Calls Process Call with Sales, Solutions Architect, & Customer to review process
 - Setting up Handback Calls Process Call with Sales, Solutions Architect, & Customer to loop back
 - Setting up call for SOW Review
 - Sending assignment with SOW

HR to Provide the following Documents to the 1099 Employee/Corporation

- NDA – Nondisclosure Agreement for Execution
- MSA – Master Services Agreement for Execution
- Contact Sheet to include:
 - Name of Spouse/Relative/Friend
 - Phone number of same
 - Address of same
- Engagement Assignment
- Travel Policy
- SOW of the project
- Handoff Calls Process Document
- Handback Calls Process Document
- Change Order Request Document
- Instructions for Using OpenAir
- Explanation of Time, Expenses, & Payment Process, which includes:
 - Time to be reported in OpenAir each week by Tues. at 8:00 a.m. EST
 - Expenses to be reported with receipts attached in OpenAir by Tues at 8:00 a.m.
 - Payment of Services Process - Submit an invoice or time & expenses to accounting@yourcompany.com or fax to 412-321-5432.
 - Time & expenses not submitted by deadline could be delayed.

1099 Employee/Corporation Documentation to Be Returned -HR to Ensure Delivery of Such

- ▶ *Résumé* – **To Be Converted to "your company" Profile Format**
- ▶ Completed Contact Sheet
- ▶ Executed NDA - Nondisclosure Agreement
- ▶ Executed MSA - Master Services Agreement
- ▶ Certificate of Insurance
- ▶ Tax ID Number

To Do Items

1. **HR** to Contact Order Services (internal designee) for Purchase Order. Send following information:
 - Project Name
 - Project Manager assigned
 - SOW
 - Identify number of hours & cost - *Addendum to the Master Services Agreement*
 - Identify travel reimbursement amounts if applicable

2. **Order Services** to e-mail accounting@yourcompny.com when Purchase Order is issued
 - Name of Consultant
 - Name of Firm to be billed
 - The Engagement (client name)
 - Tax ID
 - Purchase order number

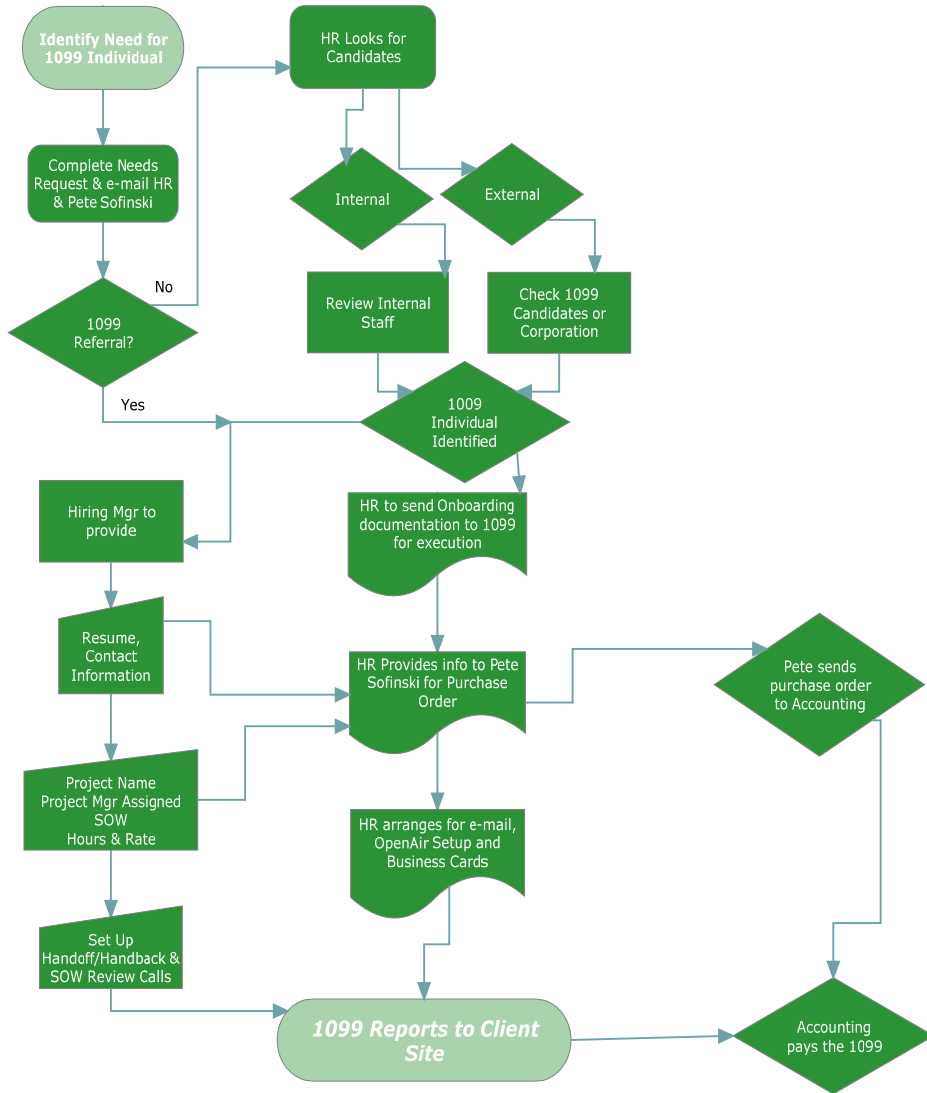
3. **HR** to set up e-mail address – contact ITsupport@yourcompny.com
4. **HR** to set up OpenAir Account – contact bss@yourcompny.com
5. **HR** to order business cards – contact lynn.getsitdone@yourcompny.com

1099 Onboarding Process

Hiring Manager Responsibilities

HR Responsibilities

Order Services & Accounting Responsibilities



1099 Employee Requisition

Requisition Information:

Dept./Group: _____

Originator: _____

Date: _____

Date Required: _____

Reason for Requisition: _____

Project Requirements:

Project (Client):

Project Location:

Project Hours:

Project Manager Assigned:

Hours Required:

Rate:

Using a Referred 1099 Employee – Please fill out the following information:

Name:

Company Name:

Street Address:

City:

State:

Zip:

Phone #:

Office:

Cell:

E-Mail:

Authorization:

Practice Director Name: _____

Practice Director Signature: _____

1099 Employee Contact Information

Name:

Company Name:

Street Address:

City:

State:

Zip:

Phone #:

Office:

Cell:

E-Mail:

Emergency Contact Name:

Relationship:

Emergency Contact Phone: