INDEPENDENT CONTRACTOR ONBOARDING CHECKLIST

Employer: Illustrative Company
Individual: Jordan Example
Position: UX Research Consultant — Product Design
Manager: Morgan Example
Start Date: May 19, 2026
Work State: MA
Work Location: Remote
Classification: Independent contractor
Onboarding Type: Independent Contractor
HR Contact: Example Coordinator — hr@example.com

> *Use the boxes to track work that still needs to be done. The underlying engagement terms and separate forms govern.*

Independent contractor engagement

- **Organization:** Illustrative Company. **Business contact:** Example Coordinator. **Services:** UX Research Consultant.
- [ ] Review Massachusetts classification under M.G.L. c. 149, §148B, including control, the hiring entity's usual course of business and an independently established business.
- [ ] Confirm who contracts with whom, the scope of services, deliverables, payment terms, work location and any required licenses, insurance or access controls.
- [ ] Check worker status against the actual working relationship for tax, wage, unemployment and other applicable law. Record the basis before treating the worker as an independent business. If employee status applies, use the employee checklist.
- [ ] For a genuine independent contractor, the hiring business does not complete an employee Form I-9 or obtain an employee Form W-4 for this engagement. The contractor's own employees are a separate matter.
- [ ] Establish the payee's tax status and the place of services before selecting tax documentation. Form W-9 generally documents a U.S. person. Use the applicable foreign-payee procedure when relevant.
- [ ] Check information reporting, withholding, and any applicable state independent-contractor reporting separately.

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- [ ] Review confidentiality terms and applicable exceptions.
- [ ] Identify deliverables and review ownership, assignments and any retained rights.

Onboarding record

Planning checklist. Track tasks here and record actual delivery, decisions and dates as they happen.

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