ICQ Information

Please Note: Submit all ICQ’s to Lorraine Curtis for review prior to submission to icqadmin@mcmaster.ca or Finance.

- **All service providers** (regardless of payment amount) require an ICQ to be completed.
  - The purpose of the ICQ is to determine the appropriate working relationship (independent contractor vs. employee).

- If the provider is determined to be an employee (McMaster employee within the last 12 months), an **HR Approval Number** is required.

- If the dollar amount of the contract is >$9,999.99, an **HR Approval Number** is required, regardless of whether or not the individual was a previous McMaster employee within the last 12 months.

- If the dollar value of the contract is <$9,999.99, an **HR Approval Number** is only required if the individual was a previous McMaster Employee within the last 12 months.
  - If the initial contract did not exceed $9,999.99, but payments begin to exceed $9,999.99, then a revised ICQ should be submitted with the updated payment amount, and this new ICQ would require an **HR Approval Number**.

- If the ICQ determines that the relationship is that of an independent contractor the purchasing policy thresholds kick in.
  - The $10,000 threshold is the first dollar threshold where a PO is required. From $0 - $10,000 the user may purchase goods or services by invoice, P-Card, Non PO Voucher or 1 written quote.
  - From $10,001-$50,000, 2 written quotes are required or sole source justification, and so on.
  - **The dollar thresholds are not per year.** They are the total value of the contract with the service provider. If the contract with the service provider is $10,000 per year for two years, then the total value of the commitment is $20,000 and would therefore require 2 written quotes.

Anytime over the course of the contract the working relationship changes or the answers to any of the questions in the ICQ change, a new ICQ should be completed and submitted.

Please note: Whether an HR Approval number is provided or not, the supplier setup and payment process is the same. Please refer to next page.
Supplier Setup (as per PeopleSoft instructions)

Where do I setup new suppliers for Non-PO Voucher or Purchase Requisitions?

- To setup suppliers not currently entered in PeopleSoft please go to the following link:
- Main Menu | Finance | Purchasing | Requisitions | Supplier Setup Change Request
- Select the “Add a New Value” tab. This will lead you to an online form which you will need to complete and submit online.

  - Complete the form and attach the completed ICQ as backup information.
  - Indicate ‘Withhold Tax’ if applicable, in the Notes box—“Have tax withheld and a T4 received by the service provider at the end of the year”.
  - When you hit submit the form is sent to Strategic Procurement who will enter the information into PeopleSoft and assign a new supplier number. You will receive an email with the new supplier number.

How can I submit the Supplier Setup/Change Request form if I don’t have all the required information? What do I do if I keep getting an error message and can’t submit?

- The fields with the asterisk are mandatory fields so they will require some information to be entered in the field. If you don’t have the banking information, please put “n/a” in the fields. For the Financial Institution just put “n/a” and then you can select the check mark next to External Bank, Account Type and Currency to select “n/a”. The system just needs something typed in those fields before you SUBMIT.

Payment Process

Invoice Received

If the contract was under $10,000, process payment as a Non-PO Voucher and attach a copy of the recent ICQ; confirming Independent Contractor status has been concluded.

If the contract was $10,000 or over and a PO was prepared, send invoice to Procurement Office for processing.