

Anschutz CSA / ASA HR Community Meeting



- ▶ **Tuesday, August 5, 2025**
- ▶ **from 10:00 to 11:30**
- ▶ **Via Zoom**

AGENDA

Adrienne Howarth-Moore, Associate Vice Chancellor & Chief Human Resources Officer

- **Welcome and Introductions**
- **Chat and Ground Rules**

Jacqueline Bannister, Business Operations Manager, Employee Services

Megan Bohn, Director of Operations, Human Resources

Lindsey Fouquette, Director of Talent Acquisition & Classification, Human Resources

- **Independent Contractors**

Lindsey Fouquette, Director of Talent Acquisition & Classification, Human Resources

- **Talent Acquisition Updates**

Justin Loiselle, HCM Program Director, Human Resources

- **Time & Labor Project Update**

Independent Contractors

Jaqueline Bannister, Business Operations Manager, Employee Services

Megan Bohn, HR Director of Operations

Lindsey Fouquette, HR Director of Talent Acquisition & Classification



Scope of Work

Classifying Services as
Independent
Contractor Work at CU

Learning Objectives:

- Understand legal and practical differences between a contractor and employee
 - Using a Decision Tree, IRS Guidelines and the SOW Form, to help you make the right classification.
- How the Scope of Work (SOW) form is a record and legal document
- Reduce the risk of misclassification



Agenda

Why This Topic
Matters

Classification
Tests & Tools

Key Differences:
Employee vs.
Contractor

Building a
Strong SOW

Contracting with
former CU
employee

Red Flags &
Risk Prevention

Support & Tools
Available

Final Message

Discussion &
Q&A



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Why This Topic Matters



Misclassification Risks:

IRS penalties & fines

Legal liability: (e.g., wage claims, benefits)

Reputational risk



Alignment Values:

Protect the organization

Support hiring managers

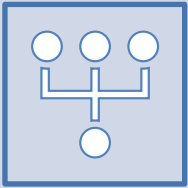
Ensures compliance



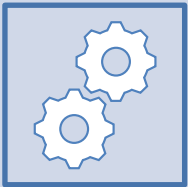
University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Control: Key difference between an employee and a contractor



Employees: The organization controls **how, when, and where** the work is performed.



Contractors: The individual has **control over how** the work is completed, using their own tools, schedule, and methods.



IRS Common Law Test



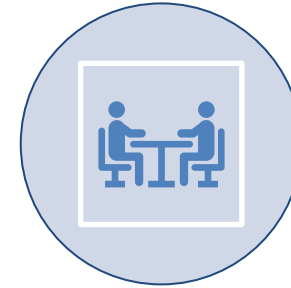
BEHAVIOR CONTROL:

Right to direct and control details and means by which an individual performs services.



FINANCIAL CONTROL:

Right to direct and control economic aspects of the individual's activities



RELATIONSHIP OF PARTIES:

The intent of parties concerning status and control of worker



Employee vs. Contractor – At a Glance

Aspect	Employee	Contractor/Consultant
Control	Employer directs how work is done	Contractor controls how work is done
Training	Provided by employer	Uses own methods/skills
Tools/Equipment	Provided by employer	Provides own tools
Schedule	Set by employer	Sets own schedule
Benefits	Eligible	Not Eligible
Tax Treatment	Employer withholds taxes	Pays own taxes (1099)
Duration/Integration	Ongoing, integral to operations	Temporary or project-based



Questions to Consider

Is the work
focused on a
specific project?

Does the work
term for a finite
amount of time?

Will the worker be
paid based on the
deliverables?

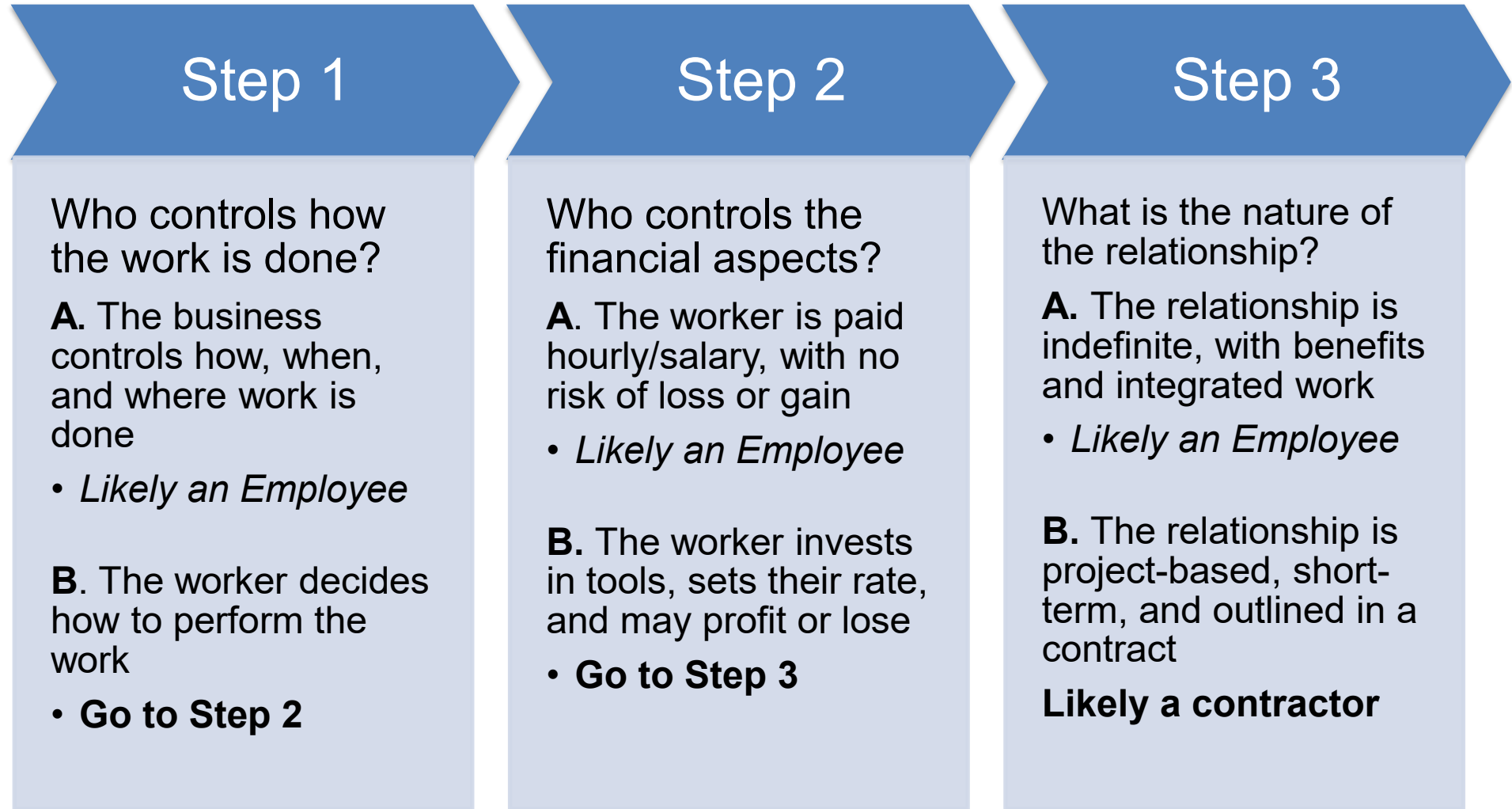
Does the work
require
specialized skills?

How much control
would your
department have
over the worker?

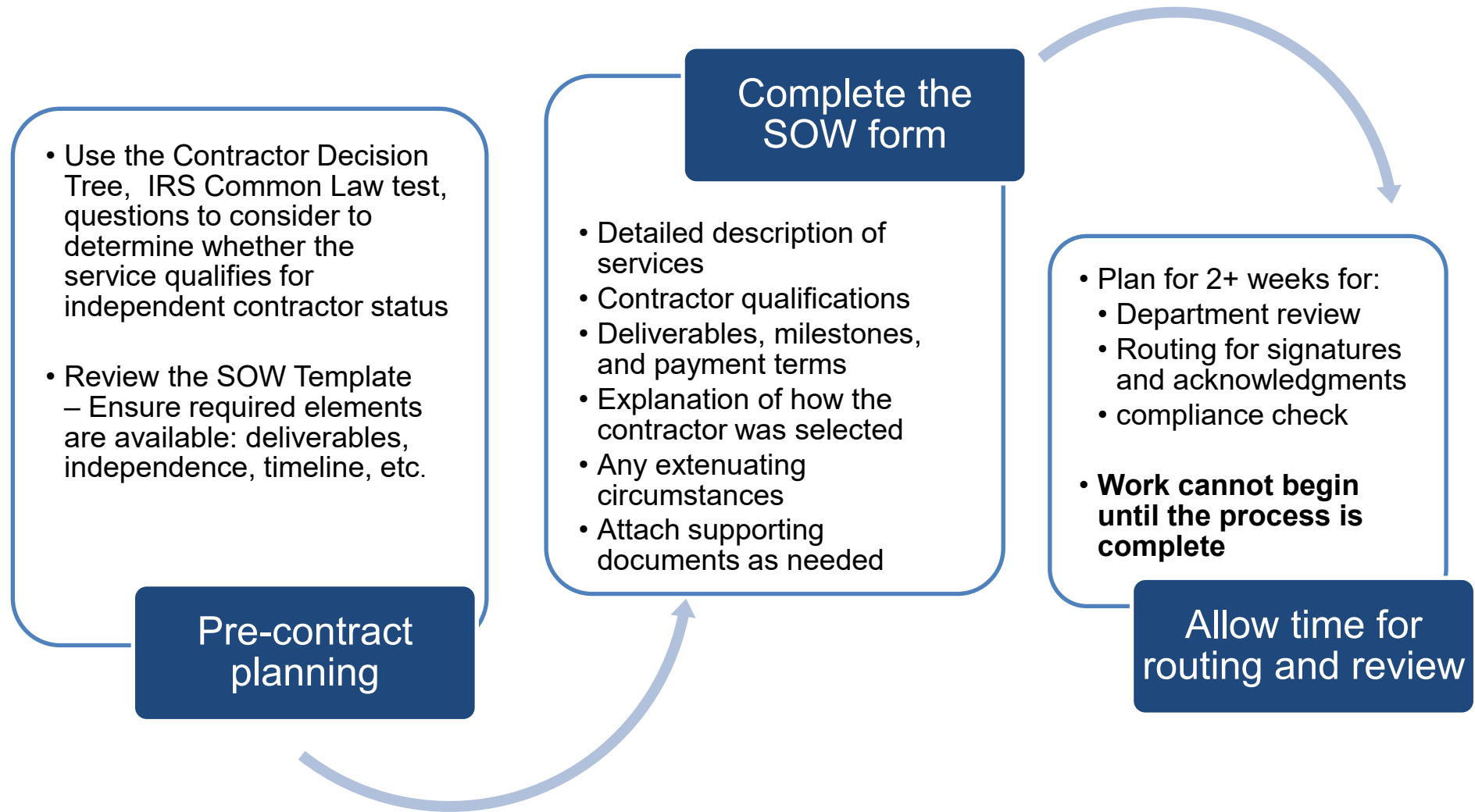
Is the proposed
work a core
function of your
department?



Contractor Decision Tree



Before the work begins....



Describe the Services

- Clearly outline what the contractor will do
- Include the scope and boundaries of the work
- Be specific—avoid vague descriptions

Contractor's Qualifications

- Special skills, certifications, or experience
- Why is this individual or business the best fit?

Deliverables and Milestones

- Include milestones, due dates, and expected format of deliverables
- Helps demonstrate independence and outcome-based focus
- These should be listed on the invoices



A termed employee cannot be contracted as an independent contractor to perform the same work.
(This includes temporary workers, post-docs, and anyone with a CU appointment in HCM.)

Why this matters:

“If the individual continues to perform the same work in the same capacity as he or she did when employed, reclassifying the individual as a contractor will be ineffective.”

- SHRM (Society for Human Resource Management)





Compliance Implications:

- **IRS & DOL standards** require proof that the individual is truly independent
- **CU Payroll guidance** prohibits issuing both a **W-2 and 1099** in the same tax year for the same person
- Violations may lead to **audits, penalties, and repayment of benefits**



Best Practice:

- Evaluate the nature of the work and employment history
- Seek guidance before hiring a former employee as a contractor
- Always use a new Scope of Work with clearly defined independent responsibilities



Contracting with a Foreign National

- The same guidelines apply to foreign nationals as US citizens to perform services as contractors or consultants.
- Services provided ***within the US*** are subject to tax withholdings.
- Contact the CU International Tax Team with any questions before the work begins for clarification on this process.



Red Flags to be aware of

Current or former employee paid as a contractor for similar work

Long-term engagement without regular review

Contractors doing core employee work

Invoices that do not include deliverables- only hours worked

No written agreement or unclear SOW



Support & Tools Available



Independent contractor
(self-employed) or
employee?

Hire An Independent
Contractor (Scope of Work) |
University of Colorado

Employee or Independent
Contractor Classification
Under the Fair Labor
Standards Act (FLSA)



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Final Message – Getting the Classification Right

Same work = Same Classification

- If an individual performs the **same work** in the **same capacity** as another CU employee, classifying them as a contractor will be ineffective or non-compliant

Bottom Line

- Classification is **not about convenience**, it's about **compliance**
- Contractors must operate **independently**, not like employees

When in Doubt- Reach Out

- Contact the SOW team before engaging a contractor.
- Especially if the individual was recently employed at CU.

Questions?



For more information :
<https://www.cu.edu/sow>

Thank you!

- SOW@cu.edu
- International Tax Team: intltax@cu.edu
- Megan Bohn, HR Operations Director |
Human Resources:
 - Megan.Bohn@cuanschutz.edu
- Lindsey Fouquette, MBA, SHRM-SCP,
Director of Talent Acquisition & Classification
 - lindsey.fouquette@cuanschutz.edu

Talent Acquisition Updates

Lindsey Fouquette, Director of Talent Acquisition & Classification

Human Resources



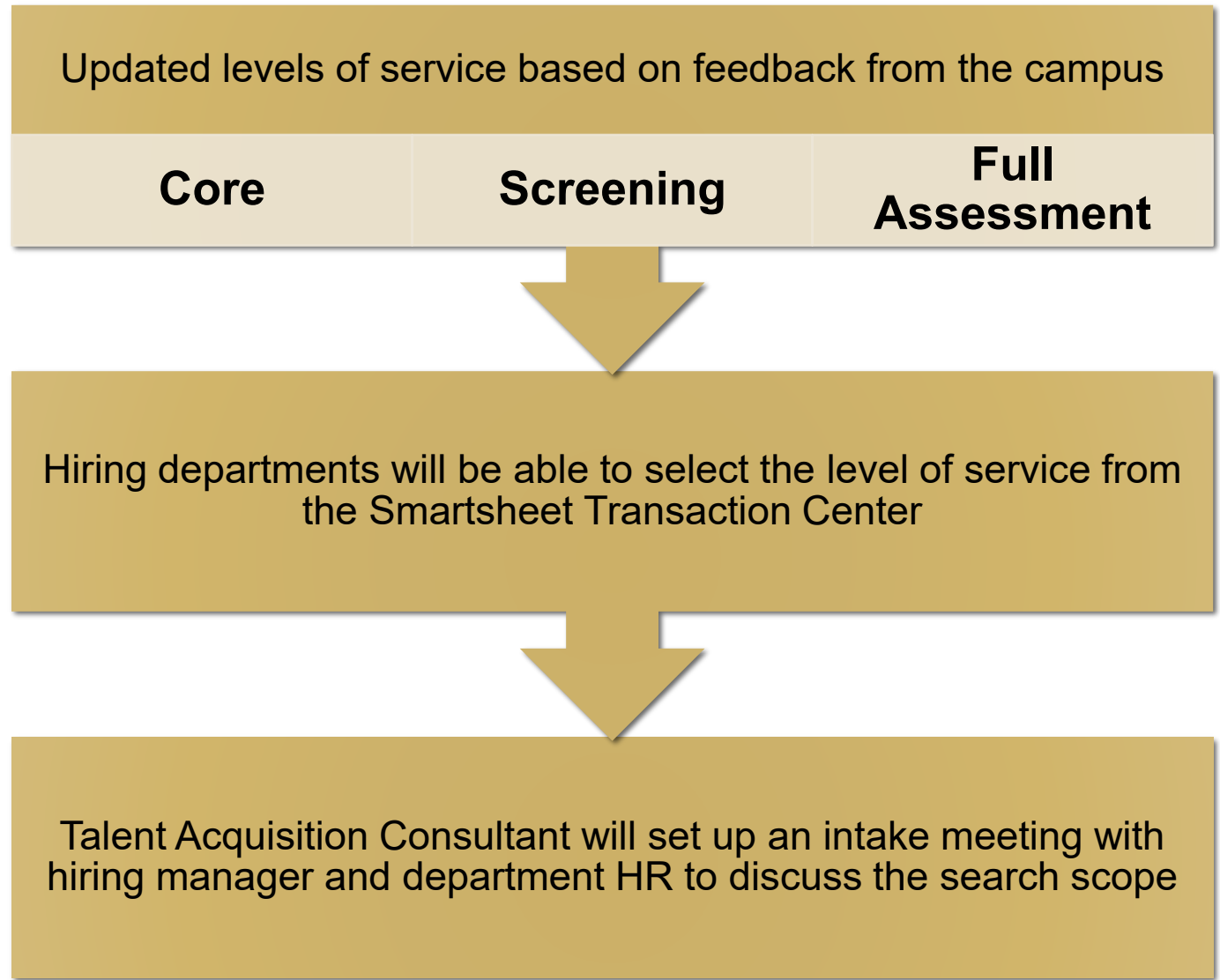
Talent Acquisition Updates:

LEVELS OF SERVICE & SOCIAL MEDIA TOOLKIT FOR
HIRING DEPARTMENTS



Talent Acquisition Levels of Service – University Staff

Talent Acquisition Service Levels – University Staff



Core



Base level of service
for all university staff
roles



Hiring department is
responsible for
ensuring the search
process is conducted
according to CU
policies and
processes



Hiring department can
reach out to their
Talent Acquisition
Consultant for
guidance



Previously referred to
as Consulting level

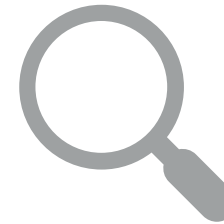
Screening



Includes everything from the
Core level



Screen on all minimum and
preferred qualifications



Complete the search matrix for
the search committee and/or
hiring manager's review

Full Assessment

Includes all options from Core and Screening

Conduct initial screening interviews and provide results to hiring department

Source qualified applicants for the role

Dispositioning of applicants who do not meet minimum qualifications

Attend the search committee kickoff meeting and discuss search best practices and confidentiality

Warm handoff to hiring department for additional rounds of interviews

Talent Acquisition Service Levels - Link

To view the service levels, please visit:

[Talent Acquisition Service Levels](#)



Questions?



Social Media Toolkit for Hiring Departments

Social Media Toolkit

Hiring department's go-to resource for promoting job opportunities across social media platforms

What's Inside the Toolkit?

This toolkit is designed to help hiring departments effectively share job openings while maintaining alignment with the Anschutz campus brand and social media strategy. It includes:

- Posting Guidelines
- Best Practices
- Anatomy of an Effective Post
- Customizable Templates

Social Media Toolkit for Hiring Departments

[Link to site](#)

[Link to Social Media Toolkit Guide](#)



Questions?

PeopleSoft Time & Labor Project Update

Justin Loiselle, HCM Project Director

Office of Information Technology



PeopleSoft Time & Labor

PROJECT UPDATE

Project Updates

Design Phase

The design phase has been extended through August 2025 to allow for the completion of the third-party activities

Payday Schedule Change

Employee Services is currently evaluating go-live date options to address the impacts of the upcoming payday schedule change



Third-Party Overview

Migration Systems

Move to PeopleSoft; may or may not decommission old system.

- 11 different systems in 14 departments

Integration/Interface Systems

Stay on existing system; Build an interface to PeopleSoft

- 13 Qgenda, 1 Medhub

Activities

- Initial meeting with department
- Fill in third-party documentation
- Develop proposal for department requirements
- Review meeting with department
- Approve solution proposal

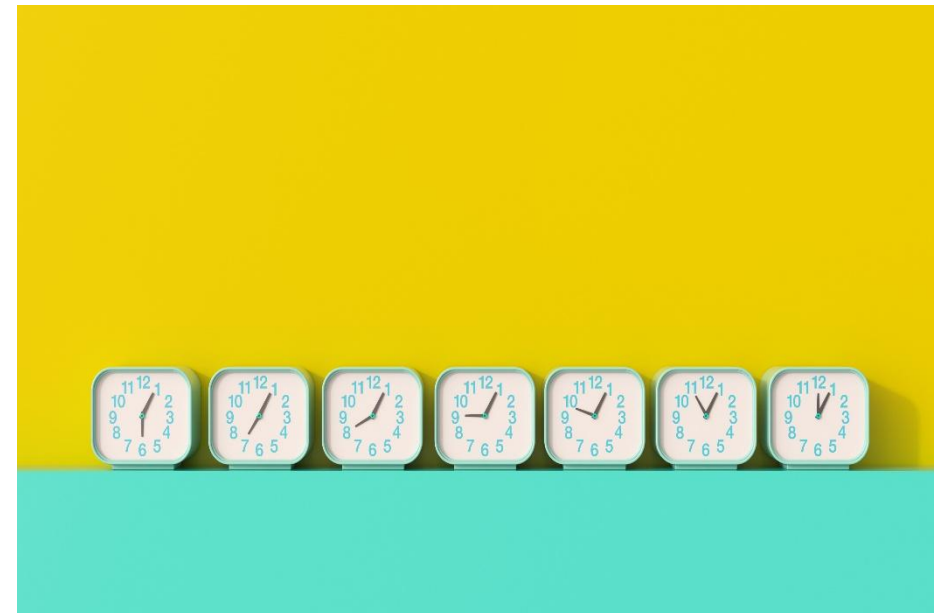
Delegation Feature Availability

Best practice is for time entry to be made by the employee. **However, the delegation feature is available for instances where unit leadership has determined that a proxy can perform time entry.** Time keeping duties will route to the proxy for as long as the delegation request is active.

Time & Labor is the system of record. All time tracking – whether by the employee or a proxy – must be recorded in T&L.

When Proxy Use May Be Appropriate (Subject to unit approval):

- **Faculty Proxy:** Faculty member emails leave details to proxy, who enters it into T&L
- **Special Cases:**
 - Employee is on medical leave or hospitalized
 - Employee is on approved vacation and cannot meet payroll deadline
 - Employee is on military leave or other approved leave statuses



Thank you!



Thank You for Joining Us

Next HR Community Meeting

October 15, 2025
10:00 to 11:30 am