STANDARD OPERATING PROCEDURE

Contractor Onboarding SOP

Document no.	SOP-ONB-007
Revision	1.0
Owner	HR Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To onboard independent contractors correctly, with a signed agreement, confirmed worker classification, and access limited to what the engagement actually requires.

2. Scope

Applies to individuals engaged as independent contractors rather than employees. Worker classification decisions follow company policy and local law; this SOP does not itself determine classification.

Definitions

Statement of work (SOW)	The document describing the specific deliverables, timeline and payment terms for a contractor engagement.
Worker classification	The determination of whether a person should be engaged as an independent contractor or an employee, based on company policy and local law.
Least-privilege access	Giving a contractor only the specific systems and data access needed for their engagement, and nothing more.

3. Responsibilities

Hiring Manager	Defines the scope of work, requests the engagement, and manages the contractor's day-to-day work.
HR Coordinator	Confirms classification with guidance from HR and legal counsel, and manages the agreement paperwork.
IT Administrator	Provisions least-privilege access and revokes it at the end of the engagement.
Contractor	Signs the agreement, provides required tax and payment information, and follows the agreed scope of work.

RACI matrix

Activity	Hiring Manager	HR Coordinator	IT Administrator	Contractor
Confirm worker classification	C	R/A	-	I
Execute the contractor agreement and SOW	C	R/A	-	R
Collect tax and payment information	I	R/A	-	R

Activity	Hiring Manager	HR Coordinator	IT Administrator	Contractor
Provision least-privilege access	C	I	R/A	-
Revoke access at engagement end	R	C	R/A	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Contractor agreement and statement of work template
- Worker classification checklist
- Tax and payment information form
- Confidentiality and data protection agreement
- Access request form
- Invoice and timesheet submission process

5. Procedure

Step	Task	Owner	Done
5.1	**Define the scope of work** The hiring manager defines the specific deliverables, timeline and expected level of independence for the engagement, which supports the classification review.	Hiring Manager	☐
5.2	**Confirm worker classification** The HR coordinator reviews the engagement against the worker classification checklist, involving legal counsel where the classification is unclear, following company policy and local law. **Checkpoint:** The engagement is confirmed as appropriate for contractor status before any agreement is signed.	HR Coordinator	☐
5.3	**Execute the contractor agreement** The HR coordinator prepares the contractor agreement and statement of work with the agreed scope, timeline and payment terms, and both parties sign before work begins.	HR Coordinator	☐
5.4	**Sign the confidentiality agreement** The contractor signs a confidentiality and data protection agreement appropriate to the systems or information they will access during the engagement.	Contractor	☐
5.5	**Collect tax and payment information** The HR coordinator collects the contractor's tax information and payment details needed to process invoices, verifying them for completeness before setup.	HR Coordinator	☐
5.6	**Request access** The hiring manager submits an access request listing only the specific systems, files or tools the contractor needs to complete the statement of work.	Hiring Manager	☐

Step	Task	Owner	Done
5.7	**Provision least-privilege access** The IT administrator provisions access strictly to what was requested, using time-limited accounts where possible that expire at the engagement end date. **Checkpoint:** Access granted matches the request exactly, with no broader permissions added for convenience.	IT Administrator	☐
5.8	**Orient the contractor** The hiring manager walks the contractor through the scope of work, key contacts, communication expectations and any tools they will use.	Hiring Manager	☐
5.9	**Set up invoicing and timesheets** The HR coordinator explains how and when the contractor should submit invoices or timesheets, and confirms the approval process before payment.	HR Coordinator	☐
5.10	**Establish a check-in cadence** The hiring manager sets a regular check-in schedule appropriate to the engagement, consistent with the contractor's independent status rather than day-to-day employee supervision.	Hiring Manager	☐
5.11	**Plan for engagement end** The hiring manager and IT administrator confirm the engagement end date in advance so access revocation and final invoice approval are scheduled rather than handled reactively.	Hiring Manager	☐
5.12	**Revoke access at engagement end** The IT administrator revokes or lets expire the contractor's access on the agreed end date, and the hiring manager confirms all deliverables were received before final payment.	IT Administrator	☐

6. Quality checks

- Every engagement has a documented classification review before the agreement is signed.
- Access granted matches the access request exactly, with no extra permissions.
- Confidentiality agreements are signed before any system access is provisioned.
- Access is revoked on or before the confirmed engagement end date.

7. Records

- Signed contractor agreement and statement of work
- Worker classification review notes
- Access request and provisioning record
- Invoices and timesheet approvals

8. KPIs

- Percentage of engagements with a completed classification review
- Time from agreement signature to access provisioning
- Percentage of access revoked on or before the end date
- Invoice approval turnaround time

9. Common mistakes

- Treating a contractor like an employee with day-to-day supervision and broad system access.
- Skipping the classification review because the engagement seems obviously short-term.

- Granting standing access with no expiration tied to the engagement end date.
- Forgetting to revoke access after the engagement quietly ends.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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