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Contractor Onboarding Checklist



For remote and international independent contractors. Go through it with each new contractor before the first task and the first payment.

☐ Tick when done mellow Mellow handles this for you as your Contractor of Record

01. Confirm It's a Contractor Relationship

mellow misclassification risk protection

- ☐ **The contractor decides how and when the work gets done**
  You agree on the result, not on working hours or methods
- ☐ **No training on how to do the job**
  The IRS treats training on procedures and methods as strong evidence of employment
- ☐ **The contractor uses their own tools and can work for other clients**
- ☐ **You pay for deliverables or against invoices**
- ☐ **You've written down why this is a contractor relationship**
  The IRS advises documenting each factor behind the decision
- ☐ **You know the contractor's country of residence**
  It decides which tax form and local rules apply

02. Documents: Collect and Check

- ☐ **Signed agreement** mellow
  Scope, deliverables and acceptance, payment terms, IP transfer, confidentiality, termination, governing law
- ☐ **NDA and IP assignment, if they're separate from the agreement** mellow
- ☐ **Tax form, for US companies** mellow
  W-9 for US persons, W-8BEN for foreign individuals, W-8BEN-E for foreign entities. Check the name, tax ID, country, signature, and date
- ☐ **ID document** mellow
  The name matches the agreement, the tax form, and the bank account
- ☐ **Business registration, if the contractor works through a company** mellow
- ☐ **Bank details** mellow
  The account holder is the contractor, not a third party
- ☐ **Licenses, certificates, or insurance**
  Only if the work requires them
- ☐ **Data processing agreement (DPA)**
  If the contractor will handle personal data

03. Red Flags: Stop and Check

- The name on the bank account differs from the agreement or ID
- The contractor refuses identity verification or a video call
- A request to change bank details arrives by email
  Confirm by phone, using a number you already have, not one from the email
- Pressure to start work or pay before the documents are signed
- Vague scope, or a refusal to sign the agreement
- A request to pay differently from what the agreement says

04. Kick Off the Work

Stays with you

- [ ] One point of contact on your side
- [ ] Brief: expected result, deadline, acceptance criteria
- [ ] Access only to the tools the work needs, under named accounts
- [ ] Communication channel and response time agreed, with time zones in mind
- [ ] Kickoff call and a first task with a deadline
- [ ] You know who accepts the work and approves the invoice

05. Before the First Payment

- [ ] All documents from section 2 are on file — mellow
- [ ] The contractor's bank details are confirmed — mellow
- [ ] The work is accepted against the brief

06. When the Work Ends

- [ ] Access to tools and accounts removed
- [ ] Final invoice accepted and paid
- [ ] Rights to the work transferred and confidentiality confirmed
- [ ] Agreement, tax form, and invoices kept on file

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Hand off the paperwork. Keep the work.

You sign one agreement with Mellow. Mellow signs agreements with your contractors, collects their tax forms, verifies them, and helps each one through onboarding.

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