



WORKER RELATIONSHIP QUESTIONNAIRE (WRQ)

RETURN TO: WAGE AND HOUR UNIT

PO BOX 201503 – HELENA, MT 59620-1503

INSTRUCTIONS:	CASE#:
<input type="checkbox"/> This six-page questionnaire is required to determine whether a worker is an independent contractor or an employee. <input type="checkbox"/> Complete one form for each worker in question. Attach additional sheets if more space is necessary. <input type="checkbox"/> Provide valid contact information. You will be contacted for additional information upon review of this questionnaire. <input type="checkbox"/> Provide photocopies of any documentation that supports your position. For example, contracts, invoices, time records, pay stubs, bank records, report forms, emails, texts, witness statements, etc.	
PLEASE COMPLETE AND RETURN THE FORM BY: _____	
THIS FORM IS BEING COMPLETED BY:	
<input type="checkbox"/> HIRING AGENT	The entity that hired the worker to perform services.
<input type="checkbox"/> WORKER	The individual who performs the service.

HIRING AGENT INFORMATION	WORKER INFORMATION
BUSINESS NAME:	WORKER NAME:
FEIN/SSN:	FEIN/SSN:
MAILING ADDRESS:	MAILING ADDRESS:
CITY • STATE • ZIP:	CITY • STATE • ZIP:
PHONE:	PHONE:
EMAIL:	EMAIL:
BUSINESS STRUCTURE: <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership or LLP <input type="checkbox"/> Member-Managed LLC <input type="checkbox"/> Manager-Managed LLC <input type="checkbox"/> Corporation	BUSINESS NAME:

ATTORNEY/CONTACT PERSON INFORMATION THAT ASSISTED WITH COMPLETION OF THIS FORM	
ATTORNEY:	CONTACT PERSON:
ADDRESS:	ADDRESS:
CITY • STATE • ZIP:	CITY • STATE • ZIP:
PHONE • EMAIL:	PHONE • EMAIL:

1. Describe the nature of the Hiring Agent's business: _____

2. Describe the work performed by the Worker: _____

3. How did the Worker discover the Hiring Agent had work available? _____

4. PROVIDE COPIES OF JOB ANNOUNCEMENTS (CRAIGSLIST, NEWSPAPER, FLYERS, ETC.).

5. Is a license or certification necessary for the Worker to perform the services? YES NO UNKNOWN
 If YES: Specify what type: _____
 Who issues it? _____
 Who pays the fee? _____
 How long has the Worker had it? _____
6. How did the Hiring Agent determine the Worker had the necessary experience to perform the work? _____

7. How did the Worker gain the experience necessary to perform the work? _____

8. PROVIDE COPIES OF ANY RELEVANT LICENSES OR CERTIFICATIONS OBTAINED BY THE WORKER.

9. What is the **date** the Worker began working for the Hiring Agent? _____
10. The Hiring Agent hired the Worker for: Single project Project basis Indefinite period
11. Where is the work performed: Hiring Agent's location Worker's location Jobsites Other: _____
12. Does the Hiring Agent assign a territory to the Worker? YES NO DOES NOT APPLY

13. Describe the terms and conditions of the initial work agreement, including any differences that may have occurred:

14. With what projects or tasks is the Worker involved? _____

15. How does the Worker know what to work on for the Hiring Agent each day? _____

16. Does the Hiring Agent furnish leads or prospective customers to the Worker? YES NO DOES NOT APPLY
 If YES, is the Worker required to pursue the leads? YES NO
 If NO, explain: _____

17. PROVIDE COPIES OF ANY WRITTEN WORK AGREEMENTS, CONTRACTS, ESTIMATES/PROPOSALS, JOB ORDERS, ETC.

18. Explain the process and/or steps taken by the Worker to perform the work for the Hiring Agent: _____

19. Does the Hiring Agent provide the Worker with training? YES NO

If YES: Specify the type of training: _____

How often is the training? _____

Who pays for the training? _____

20. Does the Hiring Agent provide the Worker with instructions or manuals on how to perform the work? YES NO

If YES, provide specific examples: _____

21. Does the Worker follow policies or procedures required by the Hiring Agent? YES NO

If YES, provide specific examples: _____

22. Does the Hiring Agent require supervision over the Worker's performance?

YES NO Explain your answer: _____

If YES, by whom? _____

23. Does the Hiring Agent have the right to change or direct the methods used by the Worker to perform the work?

YES NO Explain your answer: _____

24. PROVIDE COPIES OF ANY TRAINING MATERIALS, INSTRUCTIONS, MANUALS, POLICIES, OR PROCEDURES.

25. The Worker performs: As needed Full-time Part-time

26. How many **hours per day** does the Worker provide services for the Hiring Agent? _____

27. How many **days per week** does the Worker provide services for the Hiring Agent? _____

28. Does the Worker follow a set schedule or routine while working for the Hiring Agent? YES NO

If YES: What is the schedule or routine? _____

Who determines the schedule or routine? Hiring Agent Worker Other: _____

29. Does the Worker furnish a record of their time worked to the Hiring Agent? YES NO

30. Does the Worker report to the Hiring Agent? YES NO

If YES: How often? _____

For what purpose? _____

In what manner? _____

31. Does the Hiring Agent expect the Worker to attend meetings? YES NO

If YES: How often? _____

For what purpose? _____

In what manner? _____

32. PROVIDE COPIES OF ANY TIME RECORDS, REPORT FORMS, EMAILS, OR TEXT MESSAGES.

33. Type of pay the Worker receives: Hourly Salary Commission Day Rate Piece-work Other:_____

34. What is the Worker's rate of pay?_____

35. Who set the Worker's rate of pay?_____

36. How often is the Worker paid? Weekly Bi-weekly Monthly Project completion Other:_____

37. Does the Worker submit a time record or billing invoice for payment by the Hiring Agent? YES NO

If YES, specify:_____

38. For services provided directly to customers or clients:

Is the Worker required to adhere to prices, terms, and conditions set by the Hiring Agent? YES NO

Who bills the customer or client? Hiring Agent Worker Other:_____

Who does the customer or client pay? Hiring Agent Worker Other:_____

39. How much was the worker paid in the current calendar year?_____Previous Year:_____

40. PROVIDE COPIES OF ANY PAYSTUBS, BANK RECORDS, OR BILLING INVOICES TO VERIFY PAYMENT TO WORKER.

41. Is the Worker eligible for pension, bonuses, paid vacations, sick pay, etc.? YES NO

If YES, specify:_____

42. Does the Hiring Agent provide the Worker with bonding or liability insurance? YES NO

If YES, specify:_____

43. Does the Hiring Agent provide the Worker with health insurance? YES NO

44. Does the Hiring Agent cover the Worker with a workers' compensation insurance policy? YES NO

45. Does the Hiring Agent deduct Social Security tax from the amounts paid to the Worker? YES NO

46. How does the Hiring Agent report the Worker's income to the IRS?

Form W-2 Form 1099 Does not report Other:_____

47. PROVIDE COPIES OF ANY BENEFITS, BONUSES, FORMS W-2, FORMS 1099, OR TAX SCHEDULES.

48. Does the Worker have helpers? YES NO

If YES: Who are the helpers, including contact information?_____

What services do the helpers provide?_____

Who hires the helpers? Hiring Agent Worker Other:_____

If Worker hires helpers, is Hiring Agent approval necessary? YES NO

Who supervises the helpers? Hiring Agent Worker Other:_____

Who pays the helpers? Hiring Agent Worker Other:_____

If Worker pays helpers, does Hiring Agent reimburse the Worker? YES NO

Who provides tools to the helpers? Hiring Agent Worker Other:_____

Who terminates the helper's services? Hiring Agent Worker Other:_____

49. PROVIDE WITNESS STATEMENTS FROM HELPERS IF NECESSARY.

50. State the type and value of **tools and equipment** furnished by:

The Hiring Agent: _____

The Worker: _____

51. State the type and value of **supplies and materials** furnished by:

The Hiring Agent: _____

The Worker: _____

52. Does the Hiring Agent provide the Worker with office space or facilities to perform the work? YES NO

If **YES**, specify the location: _____

53. Does the Worker rent or lease the equipment, tools, office space, or facilities? YES NO

If **YES**, specify for what and with whom: _____

54. Does the Hiring Agent provide the Worker with a company charge card for supplies and materials? YES NO

55. What expenses does the Worker incur? _____

56. Does the Hiring Agent reimburse the Worker for any expenses? YES NO

If **YES**, specify the reimbursement expenses: _____

57. PROVIDE COPIES OF RENTAL OR LEASE AGREEMENTS, EXPENSES, AND REIMBURSEMENTS FOR THE WORKER.

58. Can the Hiring Agent discharge the worker at any time without incurring a liability? YES NO

If **NO**, explain the liability for preventing the Worker completing the work: _____

59. Can the Worker terminate his or her services at any time without incurring a liability? YES NO

If **NO**, explain the liability for failure to complete the work: _____

60. Who ended the Worker's services? Hiring Agent Worker Other: _____

61. Why did work agreement end? _____

62. Did the Worker complete the work? YES NO

If **NO**, explain: _____

63. What is the **date** the Worker stopped working for the Hiring Agent? _____

64. If the Worker hired helpers, did the helper's services also end? YES NO DOES NOT APPLY

If **NO**, explain: _____

65. If the Worker is currently providing services to the Hiring Agent, will the services end on a specific date? YES NO

66. Has the Worker ever owned their own business? YES NO UNKNOWN

If YES, explain:_____

67. Does the Worker perform similar services to other companies? YES NO UNKNOWN

If YES: How often are the services performed for others?_____

Number of other companies the Worker performed services for in the past year:_____

68. Does the Hiring Agent have priority on the Worker's time? YES NO UNKNOWN

If NO, explain:_____

69. Is the Worker prohibited from competing with the Hiring Agent at any time? YES NO UNKNOWN

If YES, why?_____

70. What business name does the Worker represent? Hiring Agent's Worker's Other:_____

71. Is the Worker represented as an employee of the Hiring Agent? YES NO UNKNOWN

If NO, how is the worker represented?_____

72. Does the Worker represent self to the public as being in a business? YES NO UNKNOWN

If YES, how?_____

73. Does the Worker advertise or maintain a business listing? YES NO UNKNOWN

If YES, how?_____

74. Does the Worker provide their own commercial general liability insurance policy? YES NO UNKNOWN

If YES, with whom?_____

75. Does the Worker have their own shop or office? YES NO UNKNOWN

If YES, where?_____

76. Does the Worker have a financial investment related to the services performed? YES NO UNKNOWN

If YES, specify and provide amounts of the investment:_____

77. Can the Worker incur a loss in the performance of the service to the Hiring Agent? YES NO UNKNOWN

If YES, how?_____

78. Has any government agency ruled on the status of the Worker? YES – provide a copy NO UNKNOWN

79. Explain in detail any additional reasons why you believe the Worker is an independent contractor or employee:___

I certify that all statements and copies of contracts are true to the best of my knowledge.

Signature:_____ Date:_____

Printed Name:_____ Title:_____ Phone:_____