**New Subcontractor Template Instructions**

This document can be used to record all of the important contact and business information for new subcontractors.

1. Replace “Company Name” with the name of your company.

**New Subcontractor Section**

1. Enter the legal business name of the subcontractor on the line titled “Legal Company Name”
2. Enter the business contact name on the line titled “Contact Name”
3. On the “Payment Made To” line, confirm who the invoice payments will be addressed to. Sometimes this differs from the business name.
4. Enter the company mailing address on the lines titled “Address 1” and “Address 2”. You can enter the entire address on one line or space the address on to multiple lines in standard address format.
5. On the “Contact Phone Number” line, include the company’s main phone number or the phone number of the main contact.
6. On the “Business Email” line, include the subcontractor’s Accounts Payable email address or the email address of the main contact.
7. Enter the contract start date on the line titled “Contract Start Date”. This helps create a clear history of the contract agreement.
8. On the “Contract Rate” line, include the subcontractor’s payment terms. This could be an hourly rate, a project rate or a percentage-of-sales billed rate.
9. On the “Business Number” line, record the subcontractor’s CRA business number. If the subcontractor does not have a business number, the owner’s SIN number can be included.
10. Enter the subcontractor’s WorkSafe Canada number on the “WorkSafe Canada Number” line.
11. On the “Liability Insurance” line, note if the subcontract has liability insurance. This will help you track any adjustments in your own insurance you may need to make in order to cover your subcontractors.
12. On the “Other 1” line, replace the line name with any other relevant information you want to record. This line is optional and can be removed if it’s not needed.

**Subcontract Exit Section**

**(Use this section at the end of a contract agreement)**

1. Enter the last day worked on the line titled “Last Date Worked”. This helps create a clear history of the contract agreement.
2. On the “Special Exit Terms” line, record any additional information regarding the subcontractor completion terms that you would like a history of.

**Formatting**

1. Once all of your information has been entered, all of the descriptions can be changed to black font by highlighting the section to be changed and clicking on the menu bar: Format - Font – Font color – choose black.
2. Delete the instruction pages once the document is completed by highlighting the page and clicking on the menu bar: Edit – Cut.

**Company Name**

|  |  |
| --- | --- |
| **New Subcontractor** | |
| **Legal Company Name:** |  |
| **Contact Name:** |  |
| **Payment Made To (If different then company name):** |  |
|  |  |
| **Address 1:** |  |
| **Address 2:** |  |
| **Contact Phone Number:** |  |
| **Business Email:** |  |
|  |  |
| **Contract Start Date:** |  |
| **Contract Rate:** |  |
|  |  |
| **Business Number:** |  |
| **WorkSafe Canada Number:** |  |
|  |  |
| **Liability Insurance: Y/N** |  |
| **Other 2:** |  |

**New Subcontractor Enrollment / Exit Form**

|  |  |
| --- | --- |
| **Subcontractor Exit** | |
| **Last Date Worked:** |  |
| **Special Exit Terms:** |  |