

PennDesign

Limited Service Engagement

Effective January 1, 2017

The following protocols are guidelines when inviting an individual to guest lecture, critique, or speak at a symposium, seminar, or event where there is an expectation that the individual should receive a fee or a fee and travel expenses for his/her services.

Limited Engagement (Object Code 5313 Lecture Fee)

A guest lecturer, critic, or speaker invited by an authorized employee of the School of Design who will be compensated (fee) for their services, or for their services and travel, constitutes a limited engagement activity.

The following *two options* are available to the requestor at the time of invitation:

FEE or FEE and TRAVEL

- (1) If the requestor is paying *a fee or fee and travel expenses* to the individual or his/her entity, then the following documentation is required:

INDIVIDUAL- U.S. Citizens

- [W9](#)
- [Limited Engagement US](#)
- Invoice (must include service fee and travel expenses if applicable)

INDIVIDUAL- Nonresident Aliens

- [W-8BEN](#)
- [Limited Engagement International](#)
- Invoice (must include service fee and travel expenses if applicable)
- Passport and Stamp of Entry
- [Certificate of Foreign Source Income](#) (if applicable)
- Form 8233 (Exemption from Withholding on Compensation for Independent Personal Services of a Nonresident Alien Individual and Certain Dependents) Determination of eligible treaty benefits are made by [Tax and International Operations](#). Nonresident aliens who may be eligible to receive a tax treaty exemption will be provided with IRS Form 8233 and the applicable statement by the Tax Department. The nonresident alien must submit a signed Form 8233 to the department initiating the request for payment in order to ensure that U.S. income tax will not be withheld from the payment.

ENTITY -Firm

- Invoice from the entity
- [W9](#) US Entity
- [W-8BEN-E](#) International Entity

TRAVEL – NO FEE

- (2) If the requestor is paying *only* for the individual's **travel**, then all travel should be directly booked and paid for by the School using a University approved direct billing vendor. [Discounted Vendors for Guest Travelers](#)