Limited Engagement Payment Process:

1.) Identify the individual who will be receiving a Limited Engagement Fee
2.) Create a Limited Engagement (LE) Contract for the individual to review, complete and sign prior to the engagement as the LE Contract MUST be reviewed, approved and signed by Penn Purchasing prior to the ISP engaging in services in order for them to be eligible to provide services and receive payment
3.) Submit the LE Contract to pdpo@design.upenn.edu prior to services for FAO review and Penn Purchasing review and signature
4.) Once Penn Purchasing approves and signs the LE Contract it will be returned to you and you may initiate supplier onboarding IF the service provider is not already available in the PMP system—Check before step 5
5.) You will submit a New Supplier Request in the PMP and this will trigger Penn Purchasing to email a registration invitation to the LE Service Provider
6.) From there, you are able to follow the progress of onboarding for your LE Service Provider and once onboarding is complete, you may submit a Non-PO Payment Request in PMP for remittance of their fee
7.) Follow through each screen in the Non-PO Payment Request function within PMP completing the information as required and uploading all requested documentation-- Please be advised that while the LE Service Provider will submit their W-9 or W-8 during the onboarding process you will need to collect any other applicable documents and submit along with their LE Contract and invoice during the creation of Non-PO Payment Request
8.) Submit for approval

Forms for US Citizens

LE Contract that is signed by Penn Purchasing (please do not submit your Non-PO Request without a signed contract to avoid rejection)

Invoice for services
Any additional documents that may be applicable

Forms for International Citizens

LE Contract that is signed by Penn Purchasing (please do not submit your Non-PO Request without a signed contract to avoid rejection)

Invoice for services
Passport Biographical Page
Copy of Visa if applicable
Copy of I-94

Additional Documents if J-1 Visa (only certain J-1 types may be eligible)

Photocopy of visa
Photocopy of DS-2019 form
*If your guest speaker's J1 visa was issued by a U.S. institution other than Penn, a letter from the issuing institution recommending such activity and explaining how the activity would enhance the exchange visitor's program. This letter is to be written prior to the engagement.

**If services performed abroad by international citizens, in lieu of passport, visa, I-94 provide Certificate of Foreign Income