
2319.3 LIMITED ENGAGEMENT POLICY

Effective: January 2017
Revised: October 2016
Last Reviewed: October 2016
Responsible Office: Comptroller
Approval: Comptroller

PURPOSE

The purpose of this policy is to define Limited Engagement and outline the policy for the payment of Limited Engagement Fees.

DEFINITIONS

A Limited Engagement is a service provided by an individual who performs a one-time service, or one time per calendar year for the following service types only:

- Academic guest speaker, artist, presenter or special lecturer
- Distinguished guest speakers at University functions

POLICY

The following forms are waived for qualifying Limited Engagements: Service Provider Questionnaire, Service Provider Evaluation Worksheet, and Independent Contractor Agreement/Contract.

The following forms related to Limited Engagements must be completed and submitted to Accounts Payable via the proper Procurement/Disbursement Authorization Form (PDA) form.

For U.S. Citizens

- W-9
- Limited Engagement Agreement for U.S. Citizens
- Invoice (must include service fee and travel expenses)

For Nonresident Aliens

- W-8BEN
- Limited Engagement Agreement for Nonresident Aliens (Foreign Nationals)
- Invoice (must include service fee and travel expenses)
- Passport

- **Stamp of Entry**
- **Certification of Foreign Source Income (if applicable)**
- **Completed IRS Form 8233 (Exemption from Withholding on Compensation for Independent Personal Services of a Nonresident Alien Individual and Certain Dependents) and the applicable statement under IRS Revenue Procedure 87-9. Tax treaty benefits are not automatic. 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.**