

- 1.) Get a Limited Engagement Agreement prepared and signed by each individual:
 Don't download a static agreement because the University updates them without notice. Instead, bookmark the url: <https://www.hr.upenn.edu/policies-and-procedures/processes-and-procedures/service-provider-classification>
 I encourage someone at Penn to complete the consistent data before sending a form to the individual. For example, the description of services will be the same for everyone.

 The location is tricky. If they're all coming to Philadelphia, Philadelphia wage tax and Pennsylvania income taxes will be withheld from their payments, and Philadelphia, Pennsylvania should be what appears in the location field. If the location is at a conference in, say, Atlanta, then put Atlanta. If the services will be performed via teleconference from their respective home town, then each participant's city/state should be entered.

 The payment amount for services rendered, excluding travel expenses

 The Limited Engagement Agreement may be emailed to each individual with a request to complete the top portion, sign the second page in the section 'Service provider' and return it via email.
- 2.) The agreement completed and signed by the service provider requires the approval of Purchasing. It is emailed to bsd-sourcing@pobox.upenn.edu. Feel free to do so directly, or send it through apaycceb@lists.upenn.edu
- 3.) Once signed by Purchasing and returned to you, a non-PO supplier request is initiated by you, and the fully signed Limited Engagement Agreement is attached thereto.
- 4.) Purchasing will review the non-PO supplier request and confirm the supplier does not yet have a BEN Financials supplier number.
 Purchasing will then send an email to the address provided on the Limited Engagement Agreement. The service provider will need to log into Penn's portal and answer questions regarding the relationship between the service provider and Penn, agree to payment terms (Limited Engagement terms are net 5 days and paid via check, direct deposit, wire), provide banking information if the form of payment elected is direct deposit or wire, and either complete an electronic W9, or upload a hard copy to the portal).

 The email invitation from Purchasing is frequently overlooked, misunderstood, filtered to junkmail or otherwise lost/strayed/stolen. The invitation may be re-sent. Ask Purchasing to re-send an invitation by sending an email to [Supplier Support | Penn Purchasing Services <SupplierSupport@upenn.edu>](mailto:SupplierSupport@upenn.edu)

 Purchasing is notified when the service provider has completed all steps.
- 5.) The Penn employee who initiated the request for non-PO supplier is then notified the steps are all complete.
- 6.) After the service has been satisfactorily completed, you should initiate a non-PO payment request.
 Attach an invoice (prepared by either the service provider, or a Penn employee) to the non-PO payment request
 Attach an expenditure justification or expense approval form to the non-PO payment request
 Attach the Limited Engagement, signed by the service provider and Purchasing, to the non-PO payment request
- 7.) If paying for travel expenses, attach Guest Travel Reimbursement Form and receipts to the non-PO payment request
- 8.) Service provider gets paid

Revised 11/30/18