**CAMPUS VISITOR CHECKLIST**

Revised 7/16/2014

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| ENTERTAINMENT APPROVAL: Complete a Dedman College Entertainment Approval Form <http://www.smu.edu/Dedman/FacultyAndStaff/AcademicAffairs/FormsLibrary> and submit to the Associate Dean of Academic Affairs at least 30 days prior to the event. It is suggested that you submit as soon as the date for the visit is scheduled.  | [ ]  |
| **HONORARIUM STEP 1:** For any honorarium or reimbursement to be paid to a visitor, you must go through the Non-Payroll Payment Process. This begins with an Eligibility E-mail to determine work authorization, <http://www.smu.edu/BusinessFinance/HR/Resources/ManagerResources/NonpayrollPaymentRequests>. . If the visitor is not a U.S. citizen or Permanent Resident, this process may take more than 30 days. A copy of the visitor’s email response or HR approval should be attached to the Payment Request Form [smu.edu/controller/restricted/download/forms/payment\_request.pdf](http://smu.edu/controller/restricted/download/forms/payment_request.pdf). | [ ]  |
| **HONORARIUM STEP 2:** For an honorarium to be paid, an Independent Contractor Determination Form <http://www.smu.edu/BusinessFinance/HR/Resources/ManagerResources/Independent%20Contractor%20Determination> must be completed and scanned to IndependentContractors@smu.edu. The subject line must begin with the current year (2014, 2015, etc.) and follow with name of independent contractor. The approval process is not immediate; therefore, it is suggested that you submit the ICD as soon as arrangements for the lecture are made. Approval emails are sent out electronically. A copy of this email must be attached to the Payment Request Form <http://smu.edu/controller/restricted/download/forms/payment_request.pdf>. | [ ]  |
| **HONORARIUM STEP 3:** Have your guest sign a W-9 form <http://www.irs.gov/pub/irs-pdf/fw9.pdf> while at SMU. You can have the guest sign and send the W-9 in advance, especially if you want to personally present the check following the lecture. No one can be issued an honorarium check without this signed form. Attach the signed W-9 to the Payment Request Form. | [ ]  |
| **RECEIPTS STEP 1:** Collect all necessary receipts from your guest after he or she returns back to their home (including food, airline receipt and boarding passes, etc.). Tape the **original receipts** onto plain white paper. Include appropriate online map if the guest claims any mileage reimbursement. Make copies of all receipts for your records. | [ ]  |
| **SUBMIT RECEIPTS/FORMS FOR GUEST REIMBURSEMENT:** Submit to the Dedman College Finance Office the completed Payment Request Form with the following: (1) eligibility email or HR approval, (2) original receipts taped on white paper, (3) the printed email confirming Independent Contractor approval, (4) the signed W-9 form, and (5) a copy of the lecture flyer or description of visit purpose. | [ ]  |
| **SUBMIT RECEIPTS FOR SELF REIMBURSEMENT:**  Submit to the Dedman College Finance Office the completed Payment Request Form with the following: (1) original receipts incurred by you for your guest's visit taped on white paper, (2) the approved Dedman College Entertainment Approval Form, and (3) a copy of the lecture flyer or description of visit purpose. | [ ]  |
| **HOTEL:** Be sure that the hotel where your guest stays knows that we have tax exempt status <https://sites.smu.edu/controller/download/forms/Tax_Exempt.pdf>, Remind your guest that personal expenses such as movies, family member meals, mini-bar, etc. on the receipt cannot be charged to the University. The guest should take care of those personal expenses before checking out of the hotel and an invoice issued to SMU. Make sure the hotel has your name, SMU PO Box number and phone number for contact information. | [ ]  |
| **CONCLUDING FOLLOW-UP:** Follow-up to make sure your guest has received their honorarium and/or reimbursement. It can take a few weeks before a check is issued. | [ ]  |