

Speaker Travel and Speaker Fees

HIRING A SPEAKER

Departments frequently conduct programs which include individuals with expertise who present or participate in lectures, seminars, productions, or conferences. Prior to hiring a speaker or conference participant, the sponsoring department must decide whether the individual should be hired as an employee or as an independent contractor.

Contractor

An independent contractor presents material based upon personal experience, specific expertise, or other information. An independent contractor does not have continuing responsibility. See 70.50 and 60.01 for definitions of an independent contractor.

Employee

An employee is responsible for conducting a class which includes presentation of the material, evaluation, and related responsibilities. The duration of the class is not a factor. Faculty who team teach a course are considered employees. These faculty titles may be visiting professors or visiting lecturers.

If proposed duties are employee duties the individual should be hired as a University employee. See Chapter 60 for personnel procedures.

Foreign Speaker

If the speaker is a nonresident alien, refer to 60.05 or contact Payroll Services for special instructions; telephone 335-9575.

AUTHORIZATION

If the proposed speaker is an independent contractor, the department must complete the appropriate form to authorize the travel expenses and/or the fee. The department selects the authorization form based on the fee amount, as indicated below.

\$5000 and Over

The department completes a Departmental Requisition to authorize the fee and any necessary travel expenses if the proposed fee is \$5000 or more. See 70.50.

Under \$5000

The department completes a Travel Authority to authorize the travel expenses and/or fee if the proposed fee is less than \$5000. Refer to the example on 95.25.3. See 95.05 for general Travel Authority instructions.

BILLING

After the event or program, the department must complete the appropriate form to claim payment for expenses associate with speaker and conference participant expenses. The department selects the form based on whether or not the claim includes travel expenses. (See 95.25.2.)

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Claim Includes Travel Expenses

If the claim includes travel expenses, the department prepares a Travel Expense Voucher to claim payment for the speaker and conference participant expenses associated with expenses. The department enters the fee under *Other Expenses*. See 95.25.4 for an example.

Claim Does Not Include Travel Expenses

The department uses a State of Washington Invoice Voucher to claim a fee payment for the speaker or conference participant if the claim does not include travel expenses. See 30.45.

Taxpayer Identification

Obtain the speaker's taxpayer identification number, i.e., social security number or employee identification number. Enter the number on the Travel Expense Voucher or Invoice Voucher. WSU uses this number to meet IRS reporting requirements.

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Example of a Travel Authority to authorize expenses for a speaker or conference participant

TA No.	TA12345	WASHINGTON STATE UNIVERSITY	PULLMAN, WA 99164-1025				
See 95.05 for additional instructions.							
SECTION 1 TRAVEL AUTHORITY							
NAME OF TRAVELER/SPEAKER Alex Jones		WSU ID NO.	TITLE Professor				
		DEPARTMENT Sociology					
PURPOSE OF TRIP Dr. Jones will lecture to the graduate students in social service areas about the opportunities for research grants related to graduate theses. He will speak to three classes and on January 5 present a seminar to invited faculty and students.		MAIL CODE 1234	DATE PREPARED 12/5/11				
		PREPARER'S NAME (FIRST LAST) Alice Brown					
		PREPARER'S TELEPHONE 335-4123					
ITINERARY							
DATE	FROM	TO	HEADQUARTERS				
January 4	Iowa City, IA	Pullman	Quality Inn				
January 5		Pullman					
January 6	Pullman	Iowa City, IA					
			Check all that are authorized. <input checked="" type="checkbox"/> Domestic Speaker Fee (under \$3500 only) <input type="checkbox"/> Rental Car <input type="checkbox"/> Exceptions (Explain in Exceptions.) Enter Lodging Exception Rule Number if Applicable				
EXCEPTIONS/RESTRICTIONS/FURTHER DETAILS							
<p>I have determined that this travel plan is the most economical means available to accomplish the purposes described above without compromising personal safety. I have determined that payment for lodging, if authorized, is more economical than returning the traveler to the official station or residence.</p>							
APPROVING OFFICIAL NAME AND TITLE Calvin Rogers, Dept. Chair		APPROVING OFFICIAL SIGNATURE/DATE /s/ 12/6/11					
EXCEPTIONS NOTED AND APPROVED							
DEAN/DIRECTOR NAME AND TITLE Donald Golden		DEAN/DIRECTOR SIGNATURE/DATE /s/ 12/7/11	CONTROLLER/DATE				
SECTION 2 CONFERENCE REGISTRATION							
<input type="checkbox"/> Check if conference expenses are to be paid directly by the Travel Section. Attach a completed registration form and enter amount.			REGISTRATION AMOUNT				
SECTION 3 TRAVEL ADVANCE							
MAILING ADDRESS OF TRAVELER		AUTHORIZED EXPENSES					
		Meals and lodging (not to exceed rates in 95.19) 					
<input type="checkbox"/> Mail to traveler's address.	<input type="checkbox"/> Hold	HOLD TELEPHONE					
<p>EMPLOYEE TRAVEL ADVANCE AGREEMENT: I agree to submit an itemized Travel Expense Voucher justifying the expenditure of this advance by the tenth day of the month following the travel. I agree to return any unexpended portion of this advance with the Travel Expense Voucher immediately after completion of travel. In case of failure to file a Travel Expense Voucher or any other default, I authorize WSU to withhold the amount of this advance from my paycheck.</p>							
TRAVELER'S SIGNATURE/DATE 							
WSU1109-GENEX017-0210							
CONTROLLER' ONLY PAYMENT REQUEST NO. DATE TRAVEL DIVISION		SECTION 4 ACCOUNT INFORMATION					
FUND	SFUND	PROG	BUDGET	PROJECT	OBJECT	SUBOBJ	NET AMNT
		17A	2840	7284	03		1834.30

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Example of a Travel Expense Voucher to claim payment for expenses for a speaker or conference participant

CLAIMANT NAME, TITLE, MAILING ADDRESS Alex Jones 2345 Sixth Avenue Iowa City, Iowa 32870				WSU ID or SSN * 888-99-1111		MONTH/YEAR OF TRIP January 2012		<div style="border: 1px solid black; border-radius: 15px; padding: 5px; display: inline-block;">TRAVEL EXPENSE VOUCHER</div> WASHINGTON STATE UNIVERSITY PULLMAN, WA 99164-1025 <div style="border: 1px solid black; padding: 2px; display: inline-block;">CONTROLLER'S OFFICE USE ONLY</div> PAYMENT REQUEST NUMBER								
PURPOSE OF TRIPS (S) Dr. Jones presented a lecture to graduate classes and an invited address to faculty and students about funding opportunities.				OFFICIAL STATION Iowa City		OFFICIAL RESIDENCE Iowa City						PREPARER'S NAME Alice Brown		PREPARER'S PHONE 335-5136		
<input type="checkbox"/> Check if the claimant is not a U.S. citizen and enter visa type.				PREPARER'S E-MAIL brown@a.wsu.edu		MAIL CODE 4020		TA NUMBER TA12345		* WSU is requiring that non-WSU individuals requesting payment from WSU disclose social security number or employer ID number (EIN) pursuant to Section 6109 of the Internal Revenue Code. When required, WSU will use disclosed social security numbers for IRS reporting purposes only.						
								VISA TYPE								
TRIP INFORMATION					FOOD AND LODGING							AUTOMOBILE		TOTAL PER DAY		
DATE	FROM	TO	HOUR		BREAKFAST		LUNCH		DINNER		ROOM RATE	TOTAL FOOD & LODGING	MILEAGE		TOTAL MILEAGE COSTS	
			DEPART	RETURN	LOCATION	RATE	LOCATION	RATE	LOCATION	RATE			PT-PT	VICIN-ITY		
1/4	Iowa City	Pullman	6 am	6 pm			Denver	15.00	Pullman	17.00	70.00	102.00	46		25.30	127.30
1/5					Pullman	10.00	Pullman	12.00	Pullman	17.00	70.00	109.00				109.00
1/6	Pullman	Iowa City		11 pm	Pullman	10.00	Seattle	19.00	Denver	22.00		51.00	46		25.30	76.30
TOTALS												262.00		50.60	312.60	
<input type="checkbox"/> I claim the exception to the maximum lodging amount and certify that the following exception condition per BPPM 95.06 exists:				Rule No.		OTHER EXPENSES — Attach Required Receipts										
TRAVEL DETAILS						DATE		PAID TO			FOR		AMOUNT			
						1/4-6		Dr. Jones			Fee		400.00			
ACCOUNT CODE								CERTIFICATION AND APPROVAL I certify, under penalty of perjury, that the travel listed above was official University business and that expenses listed were appropriate in the conduct of this business. The most economical means available were used to accomplish this business unless personal safety would have been compromised. Other than as described above, I have not received nor will I receive other reimbursement for these expenses.				TOTAL TRAVEL EXPENSE		712.60		
FUND	SUBF	PROG	BUDGET	PROJECT	OBJ	SUB	AMOUNT					Limit total reimbursement to this amount.				
		17A	2480	7284	04		312.60					Less Travel Advance Enter Payment Req No.				
		17A	2480	7284	03		400.00					DUE WSU (enclose check)				
								X _____ DATE _____		CLAIMANT'S SIGNATURE						
								X _____ DATE _____		TRAVELER'S SUPERVISOR		TYPED NAME OF SUPERVISOR				
								X _____ DATE _____		EXPENDITURE AUTHORITY		TYPED NAME OF EXPENDITURE AUTHORITY				
												AMOUNT DUE CLAIMANT		712.60		