

INSTRUCTIONS ON COMPLETING THE PAYMENT FOR SERVICES REQUEST FORM

For University Policy and Regulations pertaining to service payments, see:
<http://www.bsrvm.berkeley.edu/procure/purguide/indcons.html>

This form should be used to request payment for an individual who has provided services. The campus has restrictions on the types of services which are payable, as well as who can be paid for services rendered. Certain types of payment for services cannot be processed by the BSO, but must be requisitioned through the campus' Procurement & Business Contracts Office. It is good practice, before any payment agreement is made, to first contact your budget assistant (for a list of BSO Budget Assistants, [click here](#)). Your budget assistant can help determine whether and how an individual can be paid.

Request Date: Enter today's date.

Requestor Name: Enter the name of the individual requesting payment.

Requestor Phone: Enter the phone number of the individual requesting payment.

Requestor E-mail: Enter the e-mail address of the individual requesting payment.

Payment Type: Select appropriately from the list of available payment types:

Honorarium: a payment given in recognition of a special service or distinguished achievement, for which custom or propriety forbids any fixed business price to be set (e.g., lecture, performance, or other creative activity). This payment type is 1099-reportable.

Miscellaneous Services: payment for services provided, which cannot be in excess of \$3,000 nor be for a period of over six weeks in duration. This payment type is 1099-reportable.

Participant Support (including Stipend): a project-related payment (including stipend, materials, travel, other) made to non-UC employees or students, intended to offset costs associated with participation in the project. This payment type is not subject to Human Subject protocols, and is not 1099-reportable.

Human Subject: a project-related payment made to non-UC employees or students; only for those subject to human subject protocols.

Payee Type: Select appropriately from the list of payee types. **If the payee is a UCB employee**, please contact the BSO *before* the service is performed; the payee's eligibility to receive such payments will first need to be determined. **If the payee is a foreign national**, additional forms are required. Refer to <http://disbursements.vcbf.berkeley.edu/> for instructions and forms to complete.

Empl ID/Student ID/SS#/Fed Tax ID: Enter as appropriate the Employee ID, Student ID, Social Security, or Federal Tax ID of the individual or business to be paid. If a UCB employee is being reimbursed, provide his/her Employee ID; if a business is to be paid, provide its Federal Tax ID, etc.

Payee Name: Enter the name of the individual/business to be paid.

Payment Address: Enter the complete address where payment should be sent.

Home Address: If the address provided above is not the payee's home address, provide home address here.

Dates of Activity/Service: Provide the dates of activity or service (e.g., May 2005 – June 2005).

Amount of Payment: Enter the total payment amount here.

Hourly Rate (if applicable): Provide an hourly rate.

Purpose: Provide a brief statement on the purpose of the individual's service requested for purchase, and what work was provided.

Account Name/Fund Source: Provide the account name or funding source (e.g., Ford grant) to be charged.

Approval Signature: Have the principal investigator (PI) of the funding source sign in this field, authorizing the BSO to charge costs against this account. If the PI has designated another individual to sign approval on expenses for a particular account, that individual should sign in this field (note that the BSO must be informed by the PI in writing that another individual can sign for expenses).