

# EGMS PANELIST PAYMENT SYSTEM

Version 1.1, February 12, 2018

*The Panelists' Guide to  
Using the eGMS  
Panelist Payment  
System*

## How to Submit SSN, Banking, and Travel Reimbursement Information to NEH for Panel Service

### Special Note Only for Federal Government Employees (or others who cannot accept an honorarium)

If the panelist cannot accept an honorarium (e.g. they are a federal government employee or their organization does not allow them to accept honoraria), please note that:

- If the panel involves visiting the NEH in person, the panelist will still need to provide both their SSN and banking information so that the NEH may pay them the required \$15 travel fee. They should follow all the normal steps in the instructions below.
- If the panel has no travel (e.g. a video conference call), then the panelist will be receiving no money. Hence, the NEH only needs the SSN and not the banking information. The panelist should simply enter their SSN in step 1 below and click save. The panelist can then close their browser window. They do not need to follow the steps in the rest of this document.

### Panelist Payment System

The main menu of Reach includes a tool to access a new, secure panelist payment system. Before the panel meeting, panelists should use this system to submit their Social Security Numbers and banking information. This information is required by NEH to generate a panelist service agreement. After panelist service is complete, panelists should return to the payment system to submit a payment request to NEH. If the panel involves travel, the panelist will upload their hotel receipts and other reimbursement information before submitting. The panelist payment system has additional, heightened security because it collects private, valuable information.

#### Accessing the Panelist Payment System

From the Reach main menu, a panelist should click the **Submit Information for Panelist Payments** button.

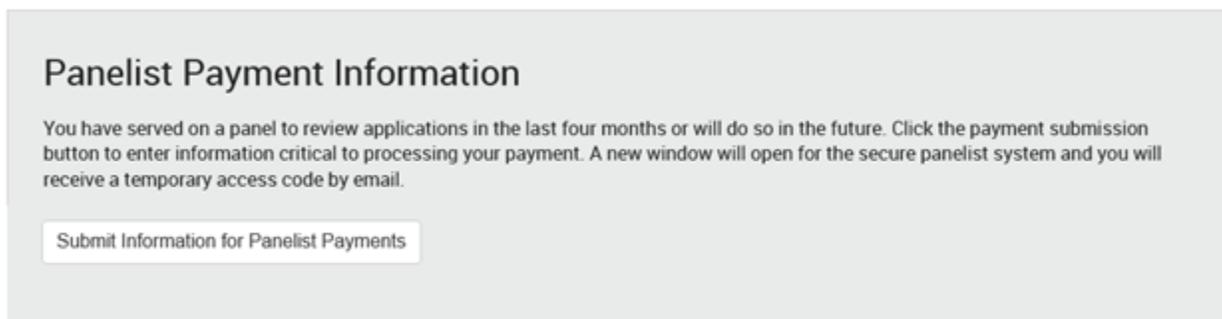


Figure 1: Generating an email link to the panelist payment system

Because a panelist's Social Security Number is required to create the panelist service agreement, panelists should go to the panelist payment system immediately upon gaining access to Reach.

After clicking the button, the panelist will receive an email message with a link to the panelist payment system. This link expires after two hours, so if the panelist payment system needs to be accessed after that time, the panelist must click the button in Reach again to receive a new email message. The email message also includes an access code. The panelist must click the link or copy it into a web browser and then enter the access code contained in the email message.

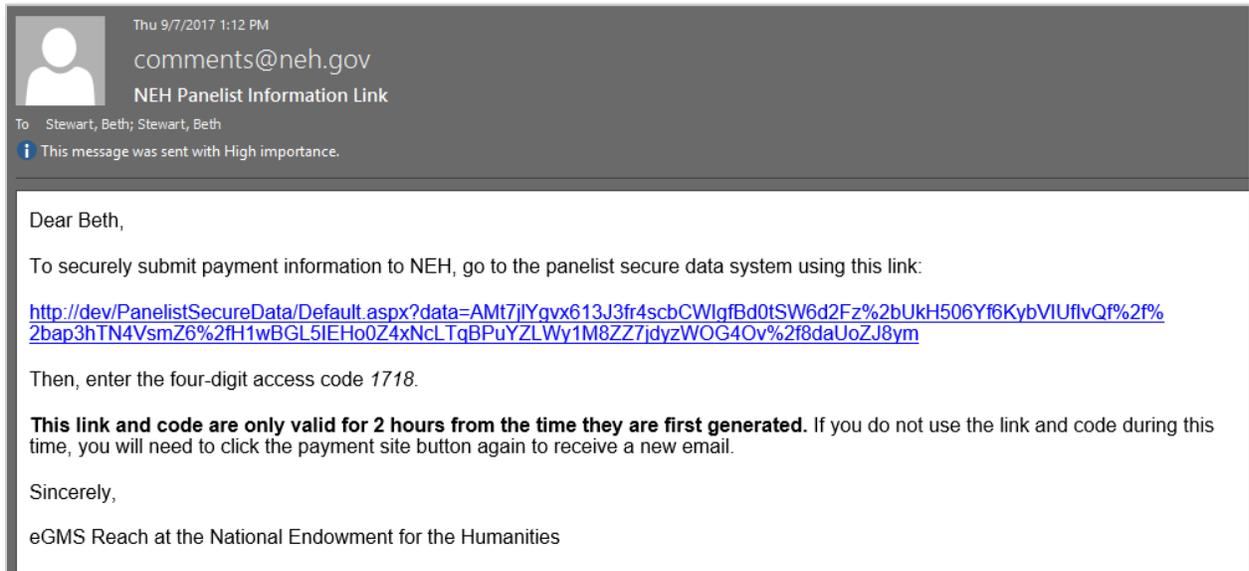


Figure 2: Email message with a link to the panelist payment system

Following the link within the email message opens the panelist payment system. The panelist must now copy or type the 4-digit access code and click **Sign in**.

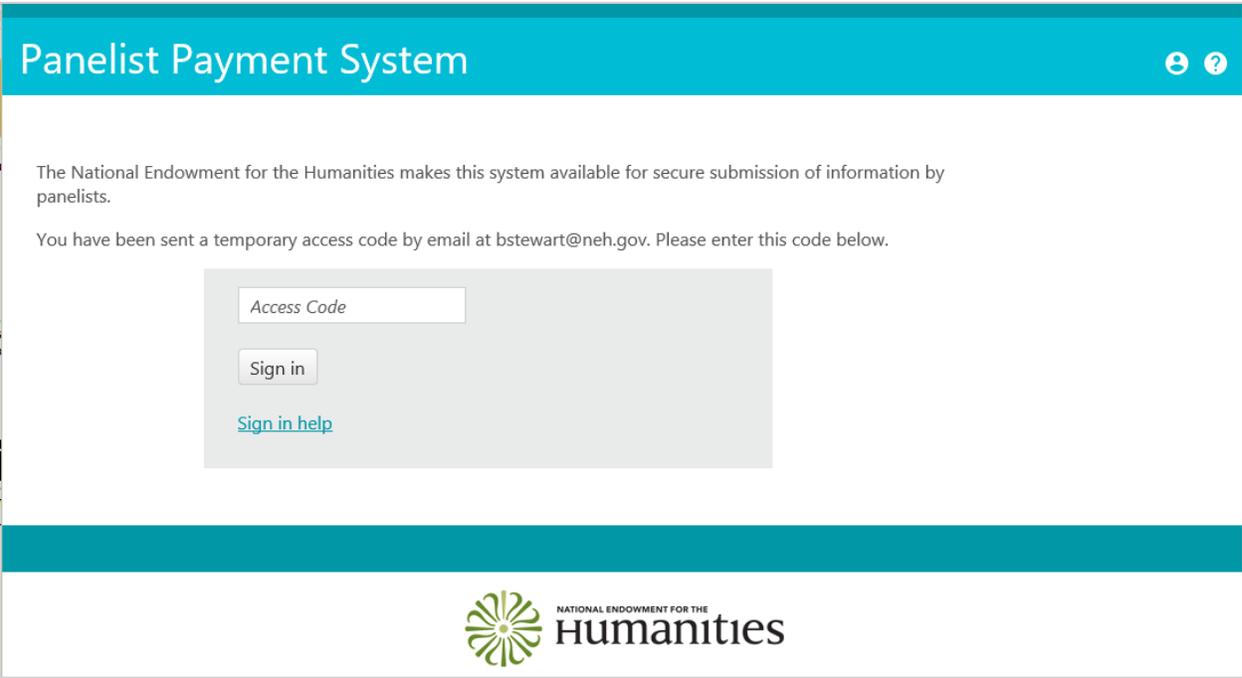


Figure 3: Panelist payment system

The panelist next sees a list of steps for submitting information to NEH so that their payment may be processed. Panelists who will travel see three steps while other panelists (for mail, video, or teleconference panels) only see two steps. (The third step is for collecting travel receipts and such.)

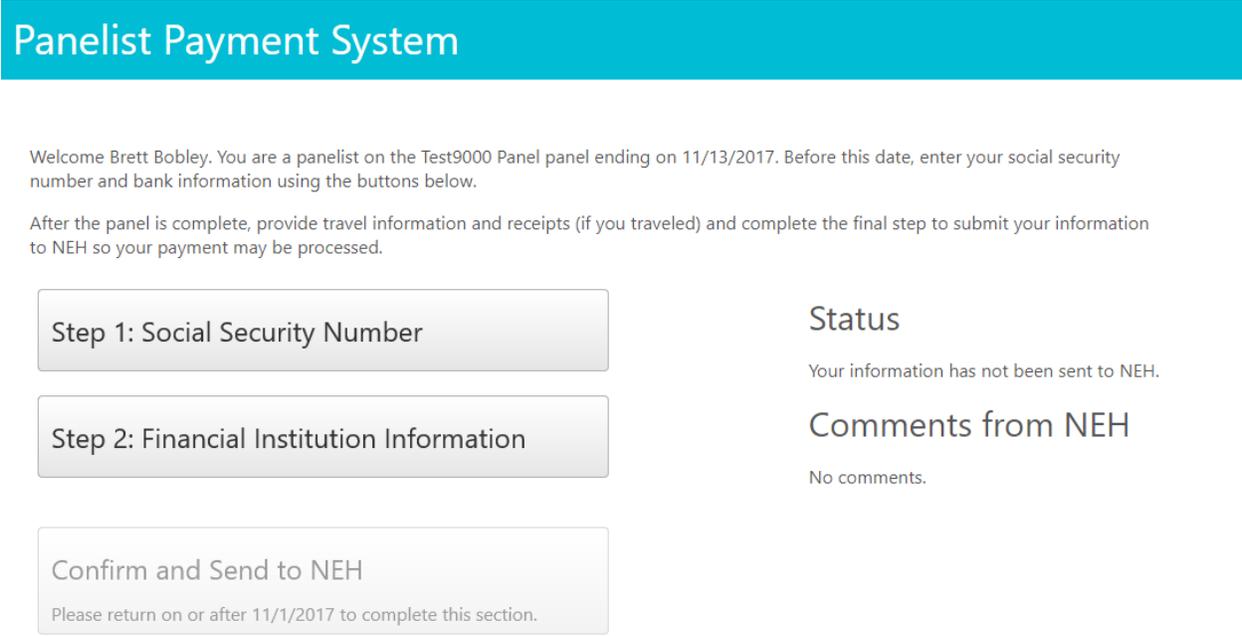
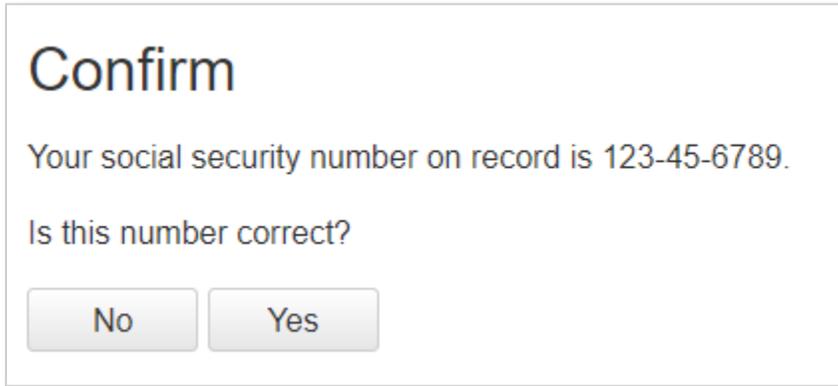


Figure 4: Panelist payment system main menu (example above is for a panel with no travel)

### Step 1: Social Security Number

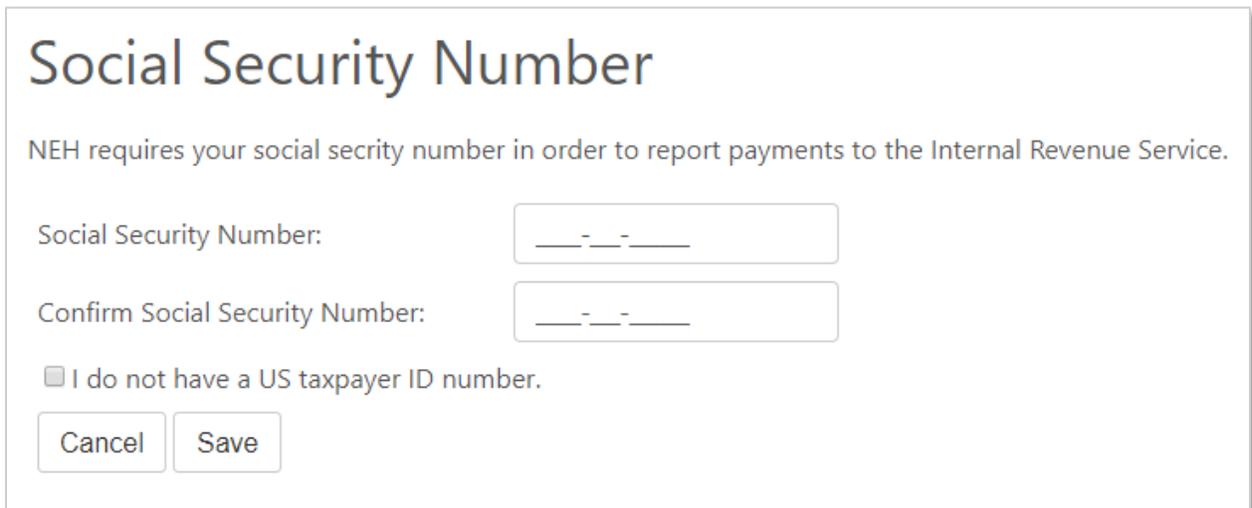
Clicking step 1 will prompt the panelist to enter her Social Security Number. If eGMS already has a Social Security Number on file, the panelist will be able to see the current information and revise it if necessary.



A dialog box titled "Confirm" with a white background and a thin grey border. The text inside reads: "Your social security number on record is 123-45-6789." followed by "Is this number correct?". At the bottom, there are two buttons: "No" on the left and "Yes" on the right.

Figure 5: Confirming an existing Social Security Number

If the panelist has no Social Security Number on record or if the number presented on the confirmation page is incorrect, the panelist sees a form to enter the Social Security Number or indicate that one does not exist.



A form titled "Social Security Number" with a white background and a thin grey border. The text reads: "NEH requires your social security number in order to report payments to the Internal Revenue Service." Below this, there are two input fields for "Social Security Number:" and "Confirm Social Security Number:", each with a placeholder showing the format "\_\_\_-\_\_-\_\_\_\_". There is a checkbox labeled "I do not have a US taxpayer ID number." and two buttons at the bottom: "Cancel" and "Save".

Figure 6: Entering the Social Security Number

After saving the Social Security Number, the panelist is returned to the main menu and the first step is marked as complete.

# Panelist Payment System

Welcome Beth Stewart. You are a panelist on the September 2017 Sitting Panel panel ending on 9/30/2017. Before this date, enter your social security number and bank information using the buttons below.

After the panel is complete, provide travel information and receipts (if you traveled) and complete the final step to submit your information to NEH so your payment may be processed.



## Step 1: Social Security Number

You completed this step on 9/7/2017 at 1:30 PM.

## Step 2: Financial Institution Information

## Step 3: Travel Information

Please return on or after 10/23/2017 to complete this section.

## Confirm and Send to NEH

Please return on or after 10/23/2017 to complete this section.

## Status

Your information has not been sent to NEH.

## Comments from NEH

No comments.

Figure 7: Panelist payment system menu after entering the Social Security Number (example above for a panel involving travel)

### Step 2: Financial Institution Information

Next, the panelist should go to step 2 and enter their bank's routing number and their account number (panelists may wish to have their checkbook handy to find this information). The panelist must enter a nickname for the bank account being used such as "my personal checking account." This nickname will help agency staff communicate with the panelist about the account without sharing confidential information.

YOUR NAME 101  
 123 Broad Street  
 Your Town, PA 12345

DATE \_\_\_\_\_

PAY TO THE ORDER OF \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ DOLLARS

⑆021288503    ⑆000653349809    ⑆101

**ROUTING NUMBER**      **ACCOUNT NUMBER**      **CHECK NUMBER**

Please review the information carefully. If you have questions regarding your ABA routing number and account number, contact your financial institution.

ABA Routing Number:

Account Number:

Nickname for this Bank:

Bank Account Type:  Checking  
 Savings

**Tax Notice: The entire payment you receive may be subject to federal (and possibly state) taxes since it includes a fee for your services and partial payment of travel related expenses for which NEH does not require a full accounting. If you receive \$600 or more in a calendar year, NEH will issue IRS form 1099-MISC to you and the Internal Revenue Service.**

I have read and accept the tax notice.

Figure 8: Entering bank information

Once the panelist has entered this information, it is used to generate a panelist service agreement, which the panelist will later electronically sign (typically done at the panel meeting).

### Important: After Completing Steps 1 and 2, the panelist is done for now

The panelist must return to the Panelist Payment System after their official panel date in order to complete the remaining steps (panelists will note that the remaining steps are “grayed out” until the panel date).

When the panelist logs in again *after* their panel date, they will:

- Proceed to *Step 3: Travel Information* (only panelists who had to travel will see a step 3).
- Proceed to the final step: *Confirm and Send to the NEH* (all panelists will do this step).

### Step 3: Travel information (only if you need a travel reimbursement)

For those who need a travel reimbursement: After the panel, the panelist must access the panelist payment system again. Once again, the panelist goes into Reach and clicks the panelist payment link. Once back in the Panelist Payment System, the panelist will be able to enter actual travel costs and upload any receipts for reimbursement. Note that your receipt can be a digital file with any of these file extensions: pdf, doc, docx, jpg, gif, png, bmp, or tif. After clicking step 3 from the panelist payment system main menu, the panelist sees a screen to adjust the travel costs.

# Travel Documentation

In the fields below, indicate the correct values for your travel. These fields have been pre-filled with estimates prepared prior to your meeting and should be revised with actual costs once available.

## Ground Transportation Costs

You are entitled automatically to a ground transportation reimbursement of \$60.00. If ground transportation costs (to and from airport for both departures and arrivals) exceed \$60 including any personal vehicle expenses, modify the cost here and attach receipts in the files section.

If you drove to the panel location, enter actual round-trip vehicle mileage.

## Lodging

Travel arrangements include a 1 night stay. Your lodging and meal cost should not exceed \$440.00. If your panel required a different number of nights lodging, please contact your panel chair so that this information may be adjusted. This adjustment should be handled before you complete the final step of submitting your payment request to NEH. You will receive a per diem for meals of \$122.00.

Enter the cost of your lodging. Please attach receipts in the files section documenting the cost.

## Tickets

Was your ticket arranged using Manassas Travel, Inc.?

- Yes
- No

## Unusual Expenses

If you accrued any additional or unusual expenses, indicate the amount here along with a description of these expenses.

## Files/Receipts

Click *Upload* to add files or receipts to document your travel expenses.

No Files

Figure 9: Adding travel information to the panelist payment system

## Final Step: Confirm and Send to NEH

Once panelists have completed every required step within the payment system, the final button to review information and send it to NEH is enabled. Clicking this button displays a payment request summary page.

**Send Information to NEH**

You have successfully provided the information needed to process your payment. Thank you!

**I am not allowed to accept an honorarium (e.g. I am a federal employee)**

### Payment Request Summary

By sending this information to NEH, you are requesting payment in the amount of \$337.00. This payment includes:

- Honorarium: \$250.00
- Ground transportation costs: \$87.00

You will be reimbursed for a 2 night hotel stay and receive per diem for your stay. The amount of this reimbursement will be based on the receipts you upload along with a standard rate for food. This amount is not included in the payment request amount above.

You will be reimbursed for 10 miles of personal vehicle mileage. This amount is not included in the payment request above.

By sending this information to NEH, you agree that no other invoice will be submitted except in the case of a NEH-requested revision or correction.

If questions arise, email will be sent to you at [bstewart@neh.gov](mailto:bstewart@neh.gov). Payments are processed 4-6 weeks after the panel meeting.

Figure 10: Confirming payment information

The confirmation text serves as the official payment request from the panelist. Once the panelist clicks the **I'm done – Send to NEH** button, they may continue to access the panelist payment system to check on the status of her payment or view any comments or feedback from NEH. The panelist is sent an email confirmation upon sending information to NEH.

## Special Note for Federal Government Employees (and others who cannot accept an honorarium)

If the panelist is a federal employee (or for other reasons cannot accept an honorarium), they should tick the “I am not allowed to accept an honorarium (e.g. I am a federal employee)” box (see Figure 10 above).