PANELIST PAYMENT GUIDE

The Panelists’ Guide to Using the Panelist Payment System at the National Endowment for the Humanities

Version 2.0, January 16, 2023

How to Send Information to NEH for Panel Service Payment

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

If you cannot accept an honorarium, please note that:

- If your panel involves travel, you must provide your SSN and bank information so that NEH may pay travel expenses. Follow all steps in the instructions below.
- If you will not travel and will receive no honorarium, you do not need to use the payment system.

Panelist Payment System

The main menu of Reach includes a tool to access the secure panelist payment system. Before the panel meeting, use this system to submit your Social Security Number and banking information. This information is required to generate a panelist service agreement. After your panelist service is complete, return to payment system to submit a payment request to NEH. The panelist payment system will provide easy steps to complete the payment request process.

Accessing the Panelist Payment System

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

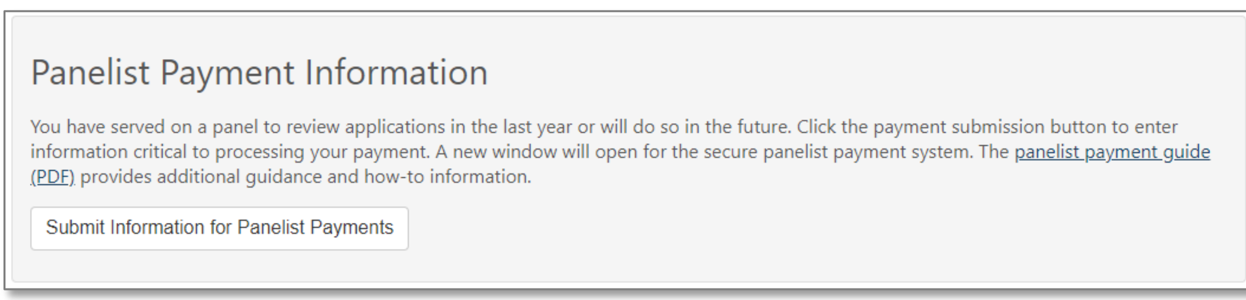


Figure 1: Accessing the Payment System from Reach

A new window or tab will open for the Panelist Payment System. If a new window or tab does not open, check if your web browser has a pop-up blocker preventing Reach from opening a new window.

The panelist payment system will prompt you to select the panel for which you will enter information.

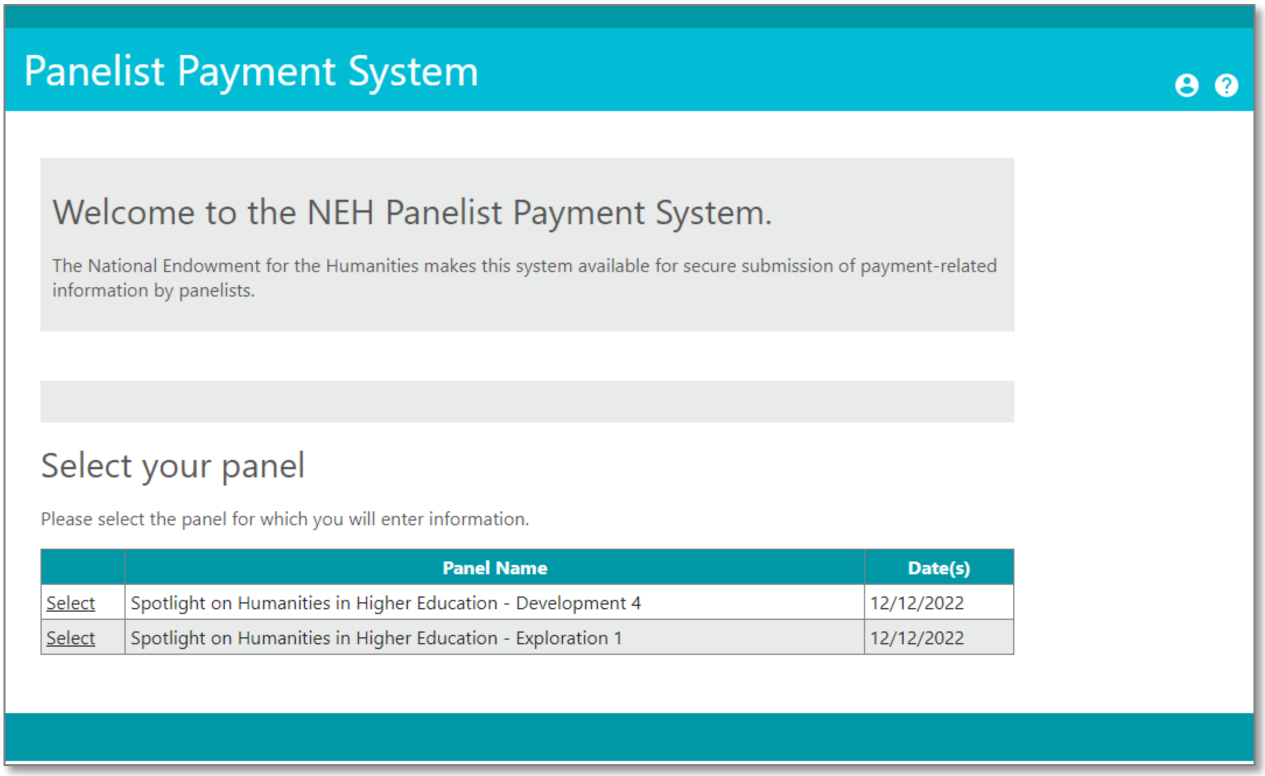


Figure 2: The Panelist Payment System

Click **Select** for the panel.

Next, you will see a list of steps for submitting information to NEH so your payment can be processed. If you will not travel, you will see two steps; if you travel, you will see three steps. The third step is used for submitting travel receipts and other travel-related information.

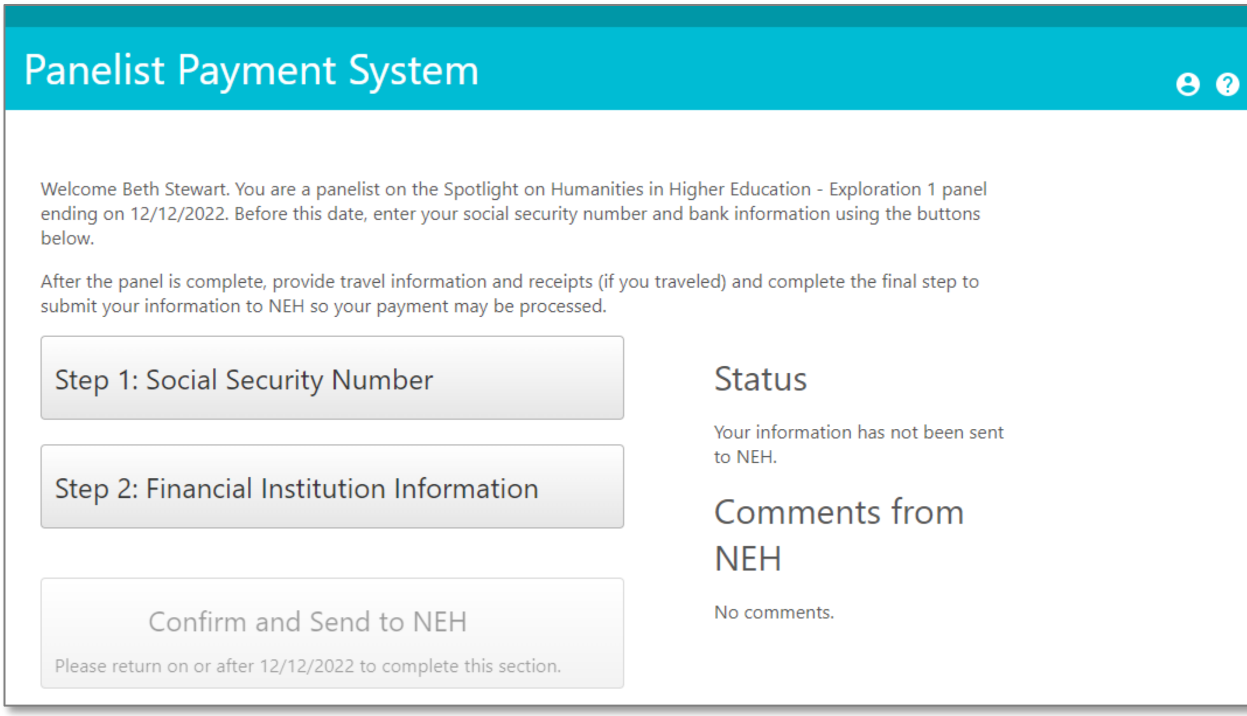


Figure 3: Panelist Payment System Main Menu

Step 1: Social Security Number

Clicking step 1 will prompt you to enter your social security number.

Important: Do not check the box indicating that you do not have a US Taxpayer ID if you have a social security number. Checking this box will prevent payment.

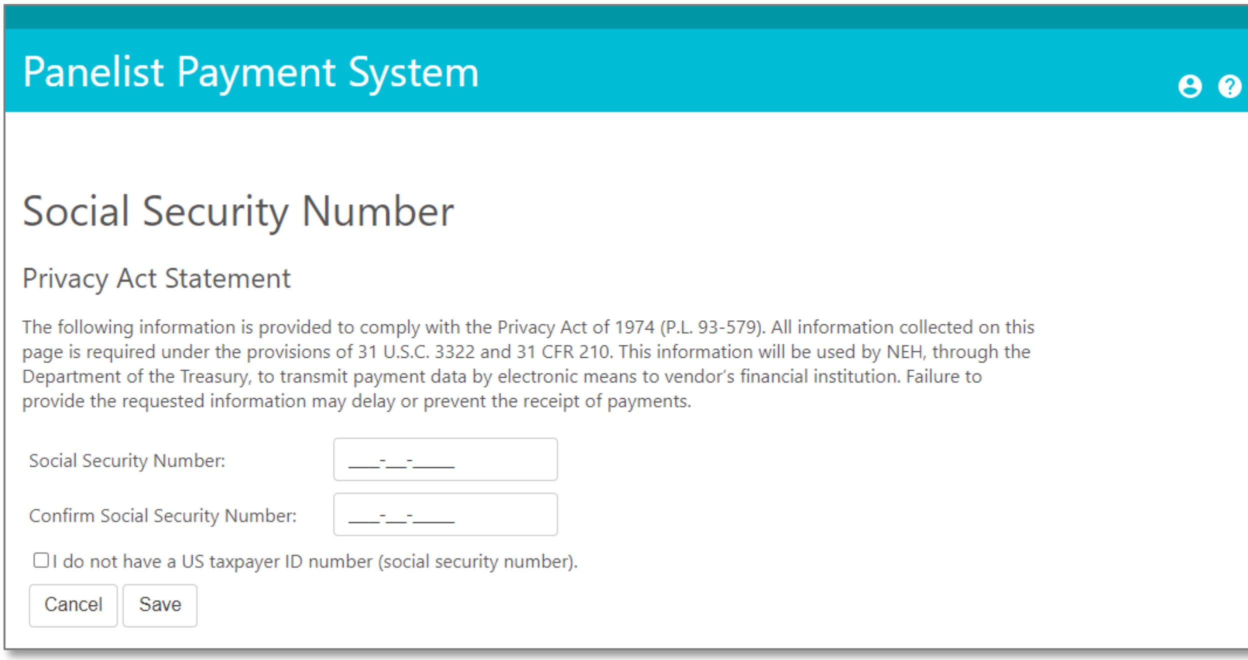


Figure 4: Social Security Number

If NEH already has this number on file, the number will be displayed to you so you can confirm its accuracy.

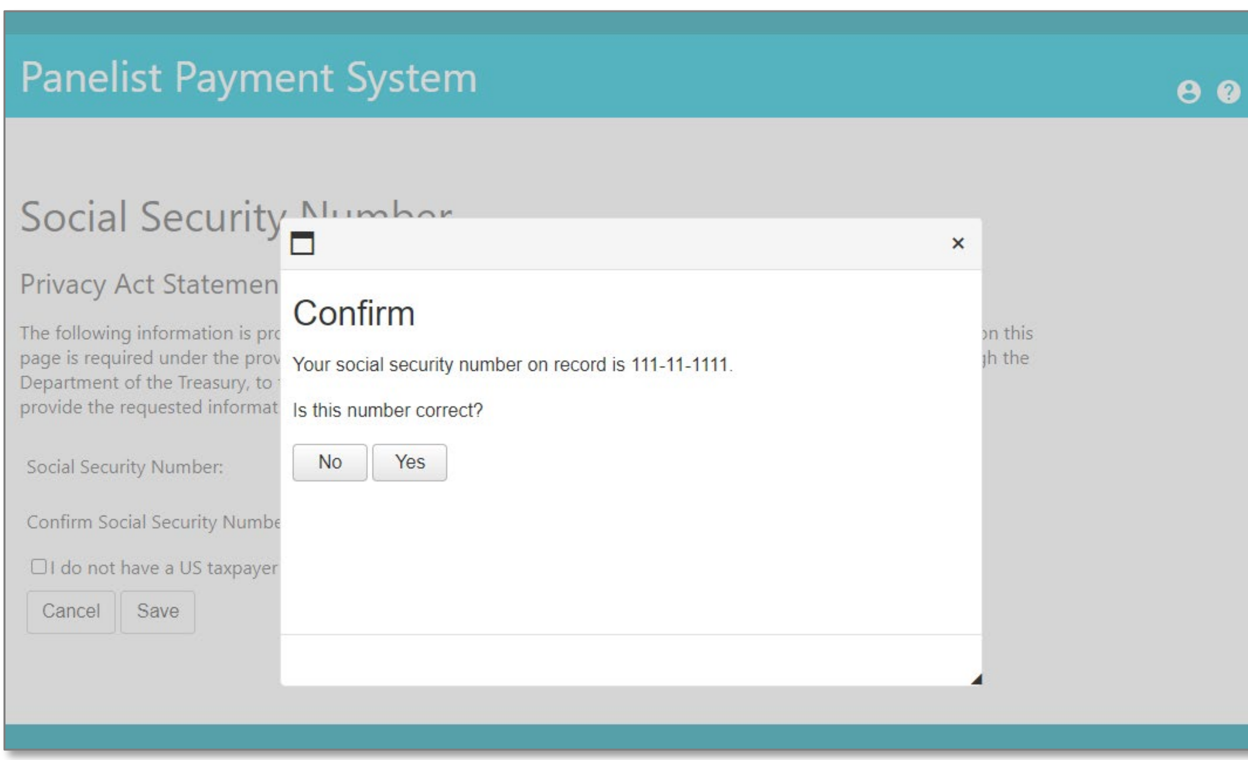


Figure 5: Confirming Social Security Number

After entering your social security number, you will return to the main menu and see a checkmark next to this step in the process.

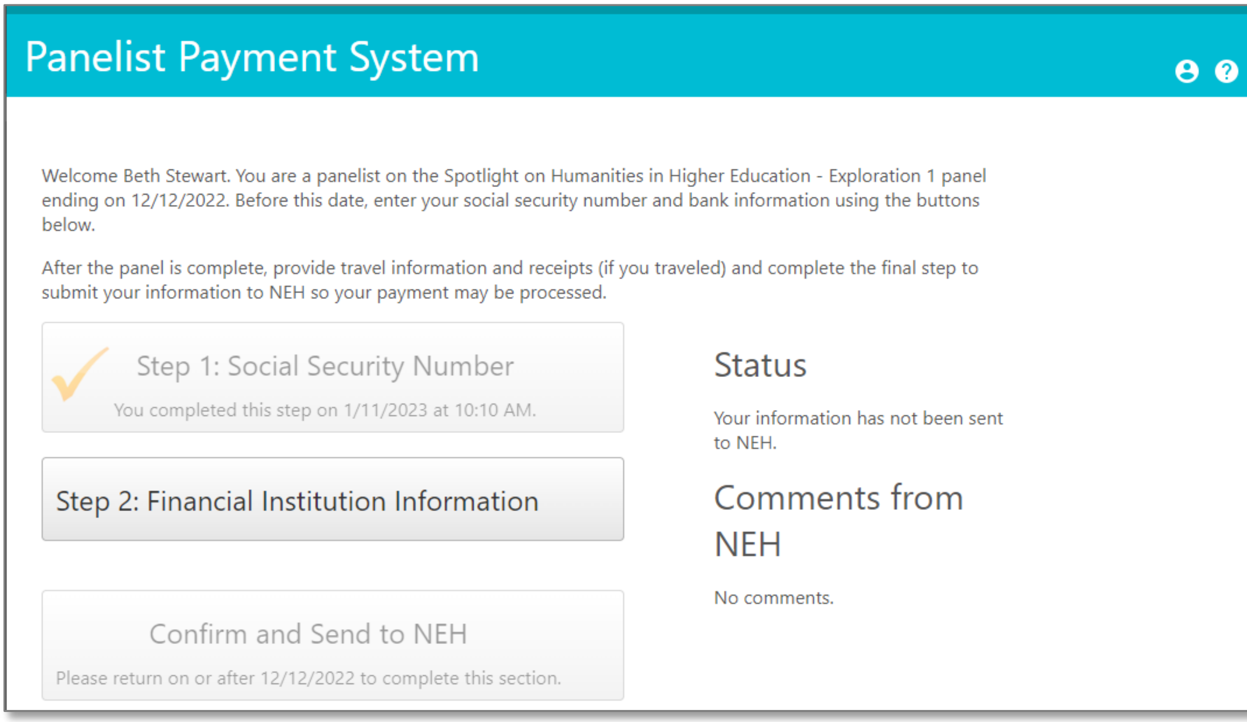
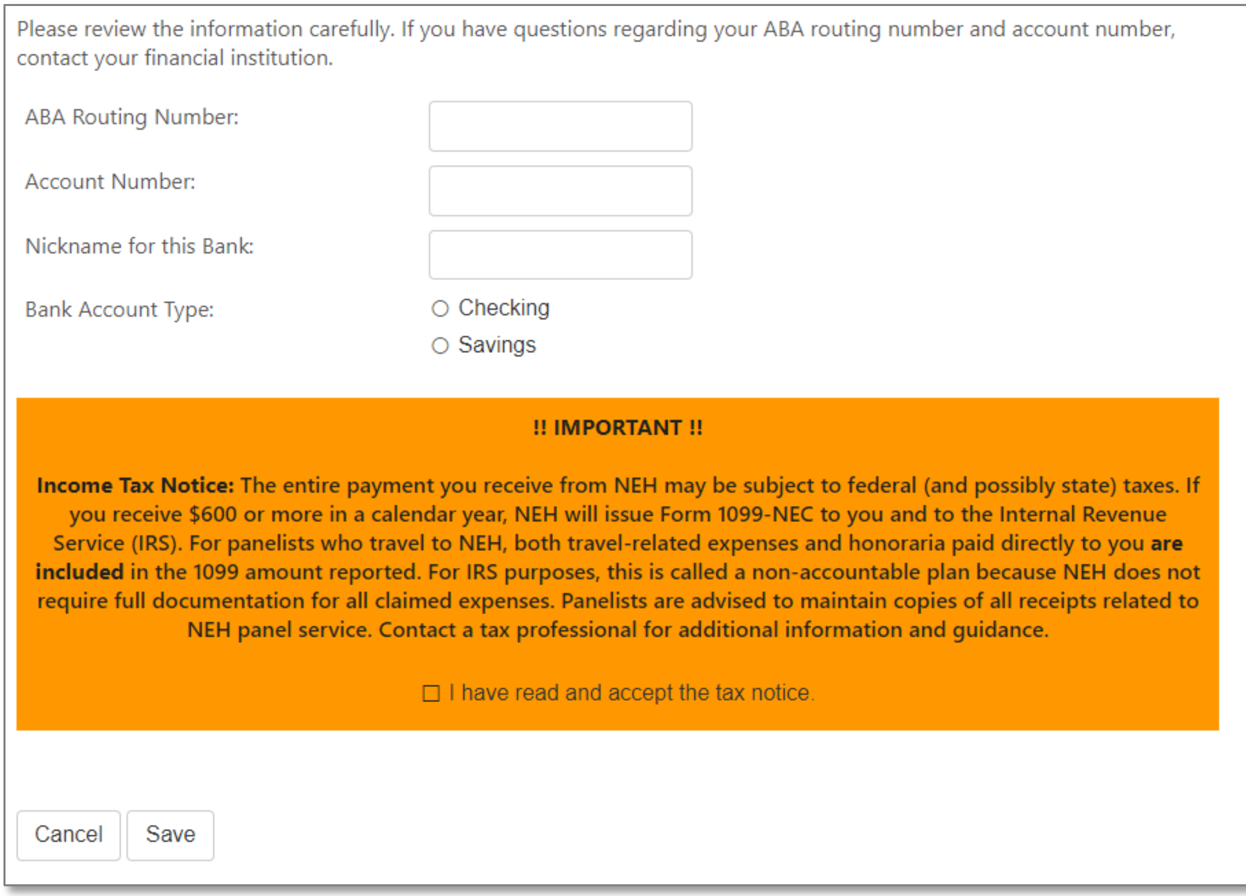


Figure 6: Main Menu after submitting Social Security Number

Step 2: Financial Institution Information

Next, go to step 2 and enter the routing number and account number for your financial institution. You must enter a nickname for the account being used such as “personal checking account.” This nickname helps agency staff communicate about the account without sharing confidential information. Before saving, you must agree to the tax notice.


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

!! IMPORTANT !!

Income Tax Notice: The entire payment you receive from NEH may be subject to federal (and possibly state) taxes. If you receive $600 or more in a calendar year, NEH will issue Form 1099-NEC to you and to the Internal Revenue Service (IRS). For panelists who travel to NEH, both travel-related expenses and honoraria paid directly to you **are included** in the 1099 amount reported. For IRS purposes, this is called a non-accountable plan because NEH does not require full documentation for all claimed expenses. Panelists are advised to maintain copies of all receipts related to NEH panel service. Contact a tax professional for additional information and guidance.

☐ I have read and accept the tax notice.

Cancel | Save

Figure 7: Financial Institution Information

After saving your bank information, a panelist service agreement will be generated for you at NEH. You may sign this agreement electronically in Reach. To do so, select your panel from the Reach main menu, select the **Files and Forms** tab, and then view the agreement under **Personal Files**.

Important: After Completing Steps 1 and 2, you are done for now!

You must return to the panelist payment system on or after the panel date to complete the remaining steps. These steps will be disabled until the panel date.

On or after the panel date, you will:

- Complete *Step 3: Travel Information* if you travel.
- Complete the final step: *Confirm and Send to the NEH*.

Step 3: Travel Information

If you travel as part of your panel service, you must enter travel information into the panelist payment system after your panel. You will enter actual travel costs and upload receipts for reimbursement. Your receipts can be a digital file with any of these file extensions: pdf, doc, docx, jpg, gif, png, bmp, or tif.

Step 4: Confirm and Send to NEH

Once your panel service is complete and you have completed every required step, the final button to review information and send your payment request to NEH is enabled. Clicking this button displays a payment request summary page.

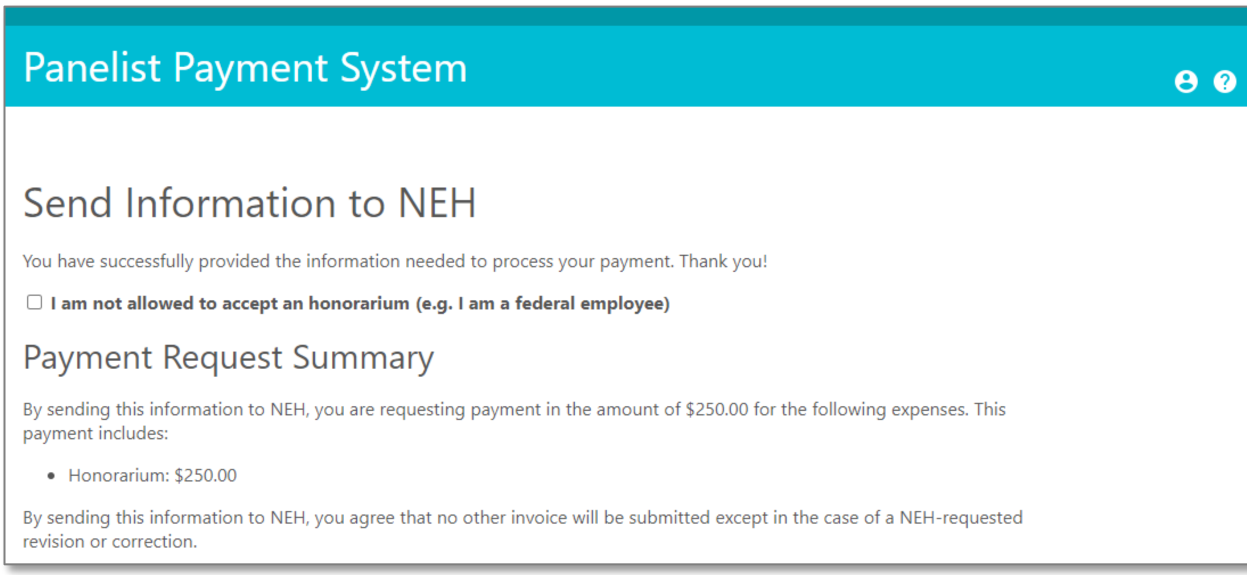


Figure 8: Submitting a Payment Request

The confirmation text serves as your official payment request. If the information on screen is correct, click the **I'm done – Send to NEH** button.

If you are a federal employee or cannot accept an honorarium, check the box labeled "I am not allowed to accept an honorarium."

After Submission

After submitting your payment request, you can continue to use the panelist payment system to check the status of your payment. You will also receive email notifications as your request is processed.