August 9, 2007

TO: Deans, Department Heads, Directors, and Business Managers

FROM: Controller’s Office

SUBJECT: Forms Update

As of 7/31/07 significant changes were made to the Check Request and Independent Contractor Certified Work Statement forms. Please download the most recent version of the forms. One of the changes to these forms was eliminating social security numbers and tax identification numbers. Reviewing areas where confidential information is maintained resulted in a decision to require these numbers only on the applicable IRS forms. The W-9 is the official form to request tax payer information for U.S. citizens.

Employee identification numbers and student identification numbers are still required when reimbursing an employee or student.

To simplify the process and minimize the number of forms, the Honorarium form was eliminated. Its function is now served on the Check Request. An honoraria is a one-time payment made to an individual, who is not an employee of the University, for a special and non-recurring activity or event for which a fee is not legally or traditionally required. The intent is to show appreciation for participation in University educational, research, or public service activities or events. Examples of honoraria are included in the Check Request Instructions. Paying honoraria now requires a Check Request and a W-9 for U.S. citizens. A W-9 is not for use by foreign nationals (nonresident aliens). See the instructions for paying a foreign national for details.

Please see the Forms Matrix for additional information on use of forms. If you have any questions concerning these changes, please contact the Controller’s Office.

All forms, instructions and the matrix are on the Accounting Office website at: http://www.finfacil.niu.edu/Accounting/AccountingOffice.htm

To keep current with the most recent version of forms, visit the Accounting Office website and update your forms regularly.