



## LBNL Invitation Letter Instructions

### **Honorariums**

Details/elements that **MUST** be included:

1. Individual is performing a service as a guest speaker/collaborator
2. Indicate date and time of event or length of activity
3. Indicate amount of the honoraria as a token of appreciation
4. If individual is an international person (resident or nonresident alien), additional documents may be required prior to payment
5. Honorariums have tax implications, consult your tax advisor
6. If recipient is a UC Systemwide employee, it requires special handling. Contact [nonemploymentpayments@lbl.gov](mailto:nonemploymentpayments@lbl.gov)

Details/elements that **MUST NOT** be included:

1. Any language referencing employment; e.g., salary, wages, compensation

### **Fellowships**

Details/elements that **MUST** be included:

1. Indicate amount per month and applicable time period, not to exceed one year
2. Provide the following:
  - a. Student fellowships - focus of independent research or study, home academic advisor, and campus
  - b. LBNL fellowships – name of the formal approved program
3. If individual is an international person (resident or nonresident alien), additional documents may be required prior to payment
4. Fellowships have tax implications, consult your tax advisor
5. Fellowships will be renewed on an annual basis
6. Fellowships are not to be made in lieu of salary for past, present or future services

Details/elements that **MUST NOT** be included:

1. Any language referencing employment; e.g., salary, wages, compensation



## LBNL HONORARIUM INVITATION LETTER TEMPLATE

Date

Name

Address

City, State, Zip

Dear \_\_\_\_\_:

Lawrence Berkeley National Laboratory (LBNL) is pleased to invite you as an honored guest to speak on the subject of (define specific activity) at the (event) to be held at LBNL on (date).

We would also like to present you with an honorarium in the amount of \$ \_\_\_\_\_ as a token of our appreciation. Based on the policy of your institution, acceptance of this payment confirms your eligibility to receive an honorarium from LBNL. If you are a UC Systemwide employee, an honorarium is subject to home campus approval and requires special processing by LBNL.

Your honorarium has tax implications, which could include mandatory tax withholding and reporting under U.S. federal and state regulations. Please contact your tax advisor for further guidance.

LBNL is required to gather certain information for tax reporting and compliance:

- If you are a U.S. Citizen (and not a UC Systemwide employee) you will need to complete IRS Form W-9 prior to payment.
- If you are an international person (resident or nonresident alien), additional documents must be completed prior to payment. You will receive an email from [support@online-tax.net](mailto:support@online-tax.net) to complete the required GLACIER (LBNL's tax compliance software) questionnaire. The email will provide instructions on how to log into GLACIER.

If you have any questions please contact [nonemployeepayments@lbl.gov](mailto:nonemployeepayments@lbl.gov).

Thank you again for your generous participation in this important event.

Regards,

(Name)

(Title)

cc: LBNL Payroll - Nonemployee Payments



## LBNL STUDENT FELLOWSHIP INVITATION LETTER TEMPLATE

Date

Name

Address

City, State, Zip

Dear \_\_\_\_\_:

Lawrence Berkeley National Laboratory (LBNL) is pleased to award you a student fellowship payment in the amount of \$\_\_\_\_\_ per month for the period of \_\_\_\_\_ to \_\_\_\_\_.

It is our understanding that you are enrolled at \_\_\_\_\_ (college or university) and the focus of your independent research or study is \_\_\_\_\_. Your independent research or study is under the direction of your academic advisor as identified below:

Name:	
Phone:	
Email:	

Your student fellowship may have tax implications, which could include mandatory tax withholding and reporting under U.S. federal and state regulations. Please contact your tax advisor for further guidance.

If you are an international person (resident or nonresident alien), additional documents must be completed prior to payment. You will receive an email from [support@online-tax.net](mailto:support@online-tax.net) to complete the required GLACIER (LBNL's tax compliance software) questionnaire. The email will provide instructions on how to log into GLACIER.

Upon your arrival in Berkeley, contact my administrator, (name), at (phone number) and the HR Service Center at 510-486-4772 ([affiliate@lbl.gov](mailto:affiliate@lbl.gov)), to finalize the process.

Regards,

(Name)

(Title)

cc: LBNL Payroll - Nonemployee Payments

LBNL International Researchers & Scholars Office (IRSO) - for international persons



## LBNL FELLOWSHIP INVITATION LETTER TEMPLATE

Date

Name

Address

City, State, Zip

Dear \_\_\_\_\_:

Lawrence Berkeley National Laboratory (LBNL) is pleased to award you an LBNL fellowship payment in the amount of \$\_\_\_\_\_ per month for the period of \_\_\_\_\_ to \_\_\_\_\_.

Your fellowship may have tax implications, which could include mandatory tax withholding and reporting under U.S. federal and state regulations. Please contact your tax advisor for further guidance.

If you are an international person (resident or nonresident alien), additional documents must be completed prior to payment. You will receive an email from [support@online-tax.net](mailto:support@online-tax.net) to complete the required GLACIER (LBNL's tax compliance software) questionnaire. The email will provide instructions on how to log into GLACIER.

Upon your arrival in Berkeley, contact my administrator, (name), at (phone number) and the HR Service Center, at 510-486-4772 ([affiliate@lbl.gov](mailto:affiliate@lbl.gov)), to finalize the process.

Regards,

(Name)

(Title)

cc: LBNL Payroll - Nonemployee Payments

LBNL International Researchers & Scholars Office (IRSO) - for international persons