



### ENGAGE DEFINITIONS

**Engagement Letters** – A contract between Executive Education and a Payee specifying a *Job* and *Rate* per unit being paid to accomplish that work for the project. Offers letters are an UPENN requirement. To be paid, an offer letter for a project must be accepted.

**Project** – The Executive Education event name.

**Payee** – A person assigned to the Job. In the case of Exec Ed, the person is faculty (internal to Penn or external). A payee may have more than one Job on a Project. This is the person responsible for the work.

**Job** – The “things” or tasks that need to get done for a Project to succeed. One or more Jobs may be assigned to a Project.

**Pay Item Status** – Stage of pay line item in payment process:

Director Approval Required – Director needs to approve the line item for payment. Once approved, the line item now appears as actionable in the Payee’s Queue for review and approval.

Payee Approval Required – Payee needs to review and approve/reject the line item for payment

Wharton F&A Action Required – Finance Office is notified that there are line items ready for payment. F&A begins the appropriate payment path depending on payment method.

Univ Processing Required – Finance Office has sent the payment over to University Accounts Payable/Payroll for processing..

Paid and Pay Date - Indicates the date that payment has been processed. For internal faculty, the date indicates the month that it will appear in your paycheck. For External faculty, it indicates the date that the check has been cut by Accounts Payable.

### PAYEE’S RESPONSIBILITIES

- Approve/Reject the Engagement Letters
- Approve/Reject Pay Items

### SETTING UP AN ENGAGE PORTAL ACCOUNT

**Step 1:** On the [Engage Portal Welcome Page](#) – enter the e-mail address and password that you wish to use for your account. Click on the **Set Password** button.

**Step 2:** A verification e-mail will be sent to the e-mail address that you have just registered for this account. The e-mail will be sent by [noreply@wharton.upenn.edu](mailto:noreply@wharton.upenn.edu) and the subject line will be “Engage Portal Verification”

**Step 3:** Once you have clicked on the link within the email, you will be returned to the Wharton Engage Portal and will be able to log on with your new account information.

### FACULTY PORTAL

**Home** – The home screen welcomes you to the portal. It provides you with resources for questions as well serves as your “Alert” center.

**My Engagements** – This is where a payee can accept or reject an engagement letter for a project. The Payee will receive an e-mail with the offer letter document (PDF). The Payee will log into the Portal, click on “My Engagements” and accept or reject the offer letter by clicking on the radio button in that column and clicking review. After reviewing, click “confirm” to accept letter. Offer letters that have been rejected require a note as to why.

**NOTE:** Engagement Letters are now required for every project and approval of the offer letter is a requirement to be able to accept pay items and receive compensation.

**My Pay Items** – This is where the payee can accept or reject their pay items that are ready for payment. The Payee will receive notification that items are in the portal awaiting their review. The Payee will enter the Portal and click on “My Pay Items”. The Payee will accept or reject the pay items by clicking on the radio button in that column and clicking review and then confirm.

**My Invoices** – Summary of approved line items that have been reviewed and confirmed by the payee at a given instance. This is informational only for the payee.

**My Profile** – The payee’s profile that is displayed internally to the Wharton staff and externally to participants through their program webpage.

**My Courses** – A description of courses that are associated with the payee.