

Payment to Individual Request

AP Forms

Folder Actions ?

Actions for Selected Favorites

Check Action Template Title: Check Action Purpose: Generic Request	Submit Request Copy
Direct Payment Form Template Title: Direct Payment Form Purpose: Check Request	Submit Request Copy
Payment to Individual Request Template Title: Payment to Individual Request Purpose: Check Request	Submit Request Copy
Refund of Receipts Template Title: Refund of Receipts Purpose: Check Request	Submit Request Copy



Quick Reference Guide

Roles: Requester

Scenario: Complete Payment to Individual (PIR)

Navigation: Shop > Shopping > View Forms

Notifications: Approver at Submit. Requester at PIR approval.

Key Tips: Only available for Requesters. Shoppers should contact their respective Requester if a PIR is needed.

1. From the Shop menu, choose Shopping, View Forms.
2. Select **AP Forms**.
3. Select the: **Payment to Individual Request (PIR) Form** or the **Submit Request** button.

ShopUW+ All Search (Alt+Q) 176.00 USD

Shop > Shopping > View Forms

< Back to View Forms

Payment to Individual Rep... Request Actions History ?

Form Number **530016**
 Purpose **Check Request**
 Status **Incomplete**

Instructions 4

The Payment to Individual form is used to request payments to individuals except salaries, employee reimbursements and payment to sub-contractors when an employee/employer relationship does not exist. **You should NOT attach W8s or W9s to this document.**

The following are acceptable uses for this form:

- Scholarships / Fellowships (Note: assistantship stipends for Research Assistants, Teaching Assistant, etc. should be paid through payroll)
- Prizes and Awards (Note: payments related to a person's employment with the university should be made through payroll)
- Research Subjects

You are strongly encouraged to submit a purchase requisition and use a PO for services. PIRs over \$5,000 may be reviewed by Purchasing.

Next > 5

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4. Read through the **instructions**.
5. Select **Next**.

Payment to Individual Request

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Shop ▶ Shopping ▶ View Forms

◀ Back to View Forms

Payment to Individual Re...

Form Number **556278**
Purpose **Check Request**
Status **Incomplete**

Instructions

Supplier ✓

Questions ✓

Review and Submit

Form Approvals

Supplier

Request Actions ▾ History ?

Supplier * 6
[Supplier Search](#)

Remit-To Address

Remit-To Address * 7
789 W MAIN ST
ANYTOWN, WI 56789
USA

Payment Method

★ Required

< Previous **Save Progress** Next > 8 9

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6. Add the **Supplier** name.
7. Review **Remit-To Address**.
8. Optionally, select **Save Progress** if the form is not ready to be completed.
9. Select **Next**.

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10. Enter the **PIR Invoice Number**.
11. Add a **Description** of what is being paid.
12. Add the total dollar **Amount**.
13. Enter the **Invoice Date**.

Payment to Individual Request

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All
Search (Alt+Q)
0.00 USD

Shop > Shopping > View Forms

Funding String ✓

Additional Information - A... ✓

Review and Submit

Form Approvals

Payment Information

PIR Invoice Number (If no invoice number provided, use the following format for invoice number: "PIR+MMDDYYYY+Lastname"- EX: DP02232021COX) *

Description for Payment (ONLY the first 30 characters will be available in SFS / WISER) - USE ALL CAPS *

1973 characters remaining

Currency (if NOT USD - use wire form below to pay in foreign currency) ?

Amount *

Invoice Date or Creation Date *

mm/dd/yyyy

Deferred Payment Date ?

mm/dd/yyyy

< Previous
Save Progress
Next >

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14. Select if this payment is to be a **Foreign Payment Wire Transfer**.
15. Add a **Business Purpose** for what is being paid for.
16. Identify if the **Individual is employed by the UW System**.
17. Identify if the individual is a **Currently enrolled UW Student**. NOTE: If yes provide the **Student ID Number**.
18. Answer the question regarding **performance or public speaker, with amount and WI residency**.
19. Identify if the **Payee is a US Resident/Entity for tax purposes**. NOTE: If this answer is Yes then additional information must be provided along with the **Non-Resident Alien Documents found here**: <https://www.wisconsin.edu/sfs/sfs-9-2-training/>
20. Upload **Attachments** as needed.
21. Select **Next**.

Payment to Individual Request

Shop > Shopping > View Forms

All Search (Alt+Q) 176.00 USD

Foreign Payments: Wire Transfer

Wire Transfers are used to send funds electronically to another country. Service fees generally apply to wire transfers and the service fee will be applied to the funding string included on this document.

Is a wire transfer required? *

Yes No 14

Business Purpose

Please provide information and justification for this payment: why, when, who and where *

Student won the literature award competition Q1 2021 hosted by College of Journalism and Mass Communication

1893 characters remaining 15

Vendor Information

Individual is employed by the University of Wisconsin System? *

Yes No 16

Currently enrolled UW student *

Yes No 17

Student ID Number

Is payee a performer or public speaker who is receiving at least \$7,000 and is NOT a WI resident? *

Yes No 18

Is the payee a US resident/entity for tax purposes? *

Yes No 19

General Attachments

Use this field for general attachments / background information. Do NOT attach W9s, W8s, or banking information.

No File Attached 20

Uploaded attachment will be copied to the invoice.

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Payment to Individual Request

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Payment to Individual Re... **Funding String**

Form Number: 556304
Purpose: Check Request
Status: Incomplete

LINE	GL Business Unit	Speed Chart	Account	Fund	Department	Program	PC Business Unit	Project	Class	edit
1	UWTRN UW - Training	NONE_TRN	2184 Training & Development- Job Rel	102 Gen Prog Ops-Non Doc Cluster	000000_TRN GENERAL*GENERAL	1 Institutional Support	no value	no value	0000_TRN DEFAULT BLDG	22

Add alternate distribution for:

★ Required

Navigation: < Previous, Next >

22. Select Edit to change funding, funding split or add required funding string elements.

NOTE: If splitting the funding by 'amount of price' the lines need to total the amount entered on the Questions page. The amount will appear below the funding lines as the document subtotal.

Note: In this example, the default funding setup under Accounting Codes in the user profile automatically populated in the form.

- 23. Select **Next**.
- 24. No fields need to be completed on the Additional Information – AP Use Only.
- 25. Select **Next**.

Payment to Individual Re... **Additional Information - AP Use Only**

Form Number: 556304
Purpose: Check Request
Status: Incomplete

Invoice Information

Invoice Received Date (MMDDYYYY) no value

Purchasing

New Fiscal Year

Buyer ID

Facilities Project Number

Capital Project Number

DFD Project Number

Departmental Reference Number

Campus Building Number

PO Start Date (MMDDYYYY)

PO End Date (MMDDYYYY)

★ Required

Navigation: < Previous, Save Progress, Next >



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Payment to Individual Request

Form Number: 530016
Purpose: Check Request
Status: Incomplete

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Funding String	✓ Required Fields Complete
Additional Information - AP Use Only	✓ Required Fields Complete

Buttons: < Previous, Add to Favorites, Submit (28)

26. Confirm all Required Fields Complete.

NOTE: Select the **Section Name** to return to add or edit information, if needed.

27. Optional: Select **Add to Favorites** to save this form for regular use.

28. Once finalized, select **Submit**.

29. Select **Yes** to confirm.

Confirm

Are you sure you want to submit this form?

Buttons: Yes (29), No

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30. Refresh the browser window and a hyperlink will appear for the invoice.

31. Click the invoice number hyperlink.

32. Review the workflow step to verify the request has moved to the approval step.

What is next?
The Payment to Individual request is routed for approval, the approver is notified, and the payment is created.

Once approved a notification is sent to the Requester.

Payment to Individual Request

Shop > Shopping > View Forms

Payment to Individual Re... **Review and Submit**

Form Number: 555953
Purpose: Check Request
Status: Approved
Invoice: V0002844

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Funding String	✓ Required Fields Complete
Additional Information - AP Use Only	✓ Required Fields Complete

Invoice : V0002844

Summary Matching Supplier Messages Comments Attachments 5 History

⚠ The invoice contains one or more non-PO invoice lines. They are excluded from the matching.

General	Addresses	Note/Attachments								
Invoice Type: Invoice	Remit To: 5138 UNITY WAY, MADISON, Wisconsin 53718-6993	External Note: no value								
Pay Status: In Process	USA, Address Id 1	Internal Note: no value								
Voucher Number: V0002844	Bill To: no address	External Attachments								
Supplier Invoice No.: PIR04122021SCHOLAR		Internal Attachments								
Supplier Name: SCHOLAR, SAM		<table border="1"> <thead> <tr> <th>Attachments</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>↓ PASSPORT</td> <td>4/12/2021</td> </tr> <tr> <td>↓ TAX EXEMPT - SCHOLAR,S</td> <td>4/12/2021</td> </tr> <tr> <td>↓ VISA DOCUM</td> <td>4/12/2021</td> </tr> </tbody> </table>	Attachments	Date	↓ PASSPORT	4/12/2021	↓ TAX EXEMPT - SCHOLAR,S	4/12/2021	↓ VISA DOCUM	4/12/2021
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↓ PASSPORT	4/12/2021									
↓ TAX EXEMPT - SCHOLAR,S	4/12/2021									
↓ VISA DOCUM	4/12/2021									
Invoice Received Date (MMDDYYYY): no value										

Tax2: 0.00
Shipping: 0.00
Handling: 0.00
Shipping Tax: 0.00
Handling Tax: 0.00
Total: 1,500.00

What's next?

Workflow

- Submitted: 4/12/2021 1:23 PM, Rolando Requester
- Approval 1: Active