

Payment to Individual Request (PIR)

NOTE: PIRs can only be used for individuals in the following circumstances; one-time services of \$500 or less, athletics officials, prizes/awards, research subjects, test proctors.

1. From the Home Page, click on the **Payment to Individual Request** under AP forms.

| Shop uw+ | | Al ¥ | Search (Alt+Q) Q | 0.00 USD 🖉 | ♡ ¢ | P1 |
|---|---------------------------|-------------------------------|--------------------|------------|--------------|-----------|
| Shop • Office Supplies | | | | | ۵ | + |
| AP Role Approver Dashboard Facility Supplies Help Dashboard IT Supplies Lab Supplies Legacy View Office Supplies Shopping Home | | | | | | |
| Organization Message | Office Supplies Suppliers | | | | | |
| UNIVERSITY of WIGCOMSIN GREEN BAY | Office Suppliers | | | | | ~ |
| System Performance issues Users are experimenting slowed performance when working in ShopUW+ at this time. Our software provider is working on a resolution. Thank you for your patience. | Staples | | | | | |
| ShopUW+ System Updates - Charpes are Live System updates were released on 7/25 by our software vendor. You'll find information regarding changes to ShopUW+ on a new 'System Updates' page on the ShopUW+ Essential website. | Procurement Forms | | | | | ~ |
| New Check/W+ Approval Reminder Franks On Statustry, July 17, new ShopUW+ approval reminder functionality will be tunned on. These reminder emails groups ShopUW+ workflow Approvers to review and approve requisitions, purchase orders, and invoices. More information will be provided closer to July 17. | Requisition Wizard | Standing Order Request | | | | |
| Flocal Year End Flocal year-end activity will start at \$00pm 6/29. Shopping and invoice creation may continue as normal. Transactions will be visible in SFS when fiscal year-end activities have concluded. | | | | | | |
| Important Update: Requisition Wizard As of 6/25, you will be instructed to use the attachments tab on the Requisition Wizard instead of the file uploads in most places on the form (e.g. sole souce will remain on the waiter of bidding tab but quotes go on the new attachments tab) | AP Forms | • | | | | ~ |
| Requisition Wizard (Previe | Direct Payment Form | Payment to Individual Request | Refund of Receipts | Che | ick Action | |
| Form Number 4030613 Purpose Procurement Request Status Preview | | | | | | |

- 2. Click **Next** on the Instructions page
- Enter the Supplier's last name. Select the correct supplier from the drop down. If the supplier does not appear, send a W9 via Liquidfiles (<u>https://liquidfiles.uwgb.edu/filedrop/alexandd@uwgb.edu</u>) to Danielle Alexander or intercampus mail it to Purchasing. Supplier set up takes up to a week. Do not email W9s or attach to ShopUW+
- 4. Verify the Remit-to Address that pops up after the supplier is selected. If the correct address is not shown, send a W9 with the correct address. Supplier changes take up to a week.

| Shop uw+ | | | | |
|---|------------|--|----------|-----------------------------|
| Shop Shopping View Forms | | | | |
| K Back to Shopping Home | | | | |
| Payment to Individual Req | Supplier | | | Request Actions 🔻 History ? |
| Form Number 4446309 Purpose Check Request Status Incomplete | Supplier * | smith SMITH AGENCY INC. THE | | |
| Instructions | | SMITH ASSOCIATES SMITH CO LLC | | |
| Supplier 🗸 | | SMITH FEEDS SMITH HABER, MANDY | | |
| Attachments 🗸 | | SMITH JR, DALE A | | |
| Review and Submit | | SMITH KISER, ASHLEE SMITH MATERIAL HANDLING AND WORKSPACE | | |
| Form Approvals | | | | |
| | ★ Required | | < Previo | us Save Progress Next > |

5. Answer the questions on the Questions page (see next page)



| Shop Shopping View Forms | | | |
|--|-------|---|--|
| Back to Shopping Home | | | |
| Payment to Individua | l Req | Questions - Check Request Information | Request Actions 👻 History |
| Form Number 4446309 Purpose Check Reque Status Incomplete | st | V On This Page Payment Information (6) | Q Question Text Is Searchabl ★ Response Is Required |
| Instructions Supplier | | Foreign Payments: Wire Transfer (2) Business Purpoles and Comments (1) Vendor Information (19) General Attachments (1) | |
| Questions | 4 | | |
| Funding String Additional Information - A Attachments Review and Submit | * * * | Payment Information If you receive a duplicate invoice error: | : PIR02232021COX)* |
| Form Approvals | | Description for Payment (ONLY the first 30 characters will be available in SFS / WISER) - USE ALL CAPS * | |

- A. PIR Invoice Number Use the last date of service in the format Ex. PIR09132021SMITH
- B. Description for Payment a short description for payment. First 30 characters will show up in WISER. Ex. 09/13/21 WBB OFFICIAL VS WRIGHT, or 09/13/21 SPEAKER MLK DAY
- C. Currency this should always be USD.
- D. Amount Amount of payment
- E. Invoice Date Use the last date of service.
- F. Deferred Payment Date Leave blank.
- G. Wire Transfer Click No. This is only for foreign transactions, contact Controller's Office prior to submission if foreign.
- H. Business Purpose Include Dates of Service and a short description of event/service. This will show up on the check stub to inform supplier what the payment covers. 60 Character limit.
- I. Individual is UW System Employee If the supplier is an employee of any UW then the payment will need to process through HR. Exceptions include prizes/awards.
- J. Currently enrolled UW student If the supplier is a student of any UW, the max amount allowed on a PIR is \$100 per calendar year. If payment is over \$100, contact HR for processing.
- K. Is payee a performer or public speaker who is receiving at least \$7,000 and is NOT a WI resident? No, if the fee is over \$500 use the requisition wizard.
- L. Was this a service performed in the U.S?
- M. Is the supplier a US resident/entity for tax purposes?
- N. General Attachments Attach back up for the payment as PDFs. Examples include a flyer for the event, or email chain coordinating the event. **Do not attach a W9.**
- O. Click Next



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| Ing String Errors Required field: Account: Line Required field: Department: Line Required field: Frogram: Line Cocounting Codes LINE GL Business Speed Ch Unit UWGEY NONE_GR UW Green Bay NONE_GR Add alternate distribution for Discoursequired | ine hart Account Fund BPY no value Required field unt V Go | Department Program PC no value no value Required Required field rr | Business Project Unit no value | Class no value | History ? |
|---|--|---|--|--|---|
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| ount Fund | Department | Program B | PC Pro lusiness Unit | ject | Class |
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- 1. Click Edit to enter funding code
- 2. GL Business Unit UWGBY
- 3. Speed Chart Leave Blank (None)
- 4. Account 4-digit account number. Professional Services is 2620. Prizes/Awards is 3750.
- 5. Fund 3-digit number from your funding string
- 6. Department 6-digit number. **All department numbers must be in format XXXXXX_GBY.** You must add the _GBY to the department number. Use the Select from all values link to select the department.
- 7. Program 1-digit number.
- 8. Project Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXX_GBY.** You must add the _GBY to the project number.
- 9. Class Only used by Athletics.
- 10. Click Save
- 11. Click Next on the AP Use Only page. Leave Blank.
- 12. Click **Next** on the Attachments page.
- 13. Click Add to Favorites if you wish to save the form for future use. (See saving a form as a template page).
- 14. Click **Submit** on the Review and Submit page.