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

**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.
Quick Reference Guide

Roles: Requester

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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.
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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.

**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.
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.