

**Payment to Individuals (PIR) through the UW-L Foundation or University Resources**

The checklist and information below is designed to provide further clarification on the process for paying individuals through the UW-L Foundation (Foundation) to comply with the fiscal and human resources policies of the Foundation and University.

Question to answer:

* Is the individual completing work for the University or work affiliated with the University where the University assumes the risk and oversight of the work being completed? For example, teaching UW-L students for a departmental course, a student completing a research project for a department, or coaching a group of student-athletes.

**Option #1: If the above answer is yes**, then the individual should be paid through the University payment process and the following steps should be taken:

1. Determine if the individual is a UW System staff/employee or student. If so, the individual will need to complete the necessary HR paperwork to turn into HR to be paid. HR payroll for lump sum payments occurs the first of every month and typically, the deadline is the 15th of the month prior to payroll. (This can vary dependent upon the payroll calendar.)
2. If the individual is not a UW System staff/employee or student, for example a guest lecturer, then the payment/work to be performed should be reviewed to determine if payment should be made via Human Resources or through the PIR process in Business Services.

Please use the decision tree to determine HR or PIR:

<http://www.uwlax.edu/uploadedFiles/Offices-Services/Human_Resources/EOPandIIA.pdf>

* 1. If determined payment via HR, see Option #1(1) above.
  2. If determined payment via PIR the individual/department will need to complete the necessary paperwork (ASSA and W9) and submit to Business Services. The timeline for processing the payment (PIR) is 6-9 business days. The ASSA and (W-9) should be completed/approved in advance of the service being provided as the ASSA confirms the negotiated service to be provided and terms of payment. Submit the PIR to Business Services to initiate the payment request, which is paid after the service, has been completed.

If either of the above methods takes place, the following steps will occur through Business Services and the Foundation:

1. The department will need to have a new fund 233 account string set up. (The fund 233 denotes a Foundation-related account.) To set up a new 233 account string, please contact Paula Lund in Business Services.
2. WISDM access to this new account will be granted to individuals that have access to their specific department accounts. The form needed to grant access to any others can be found here: <http://www.uwlax.edu/uploadedFiles/Offices-Services/Business_Services/WISDM2AuthorizationRequest.pdf>
3. The expense for the payment (whether a PIR or through payroll) will be posted to the 233 account string.
4. At the end of every month, Business Services will invoice the Foundation for any expenses in the new 233 account strings.
5. The Foundation will then withdraw the needed funds out of the specific departmental Foundation account and provide payment to UW-L.
6. That payment will be deposited in the 233 account string to cover the expenses of the prior month.
7. If a department has multiple Foundation accounts to draw from, the Foundation will follow up with the departmental contact to confirm which Foundation account to withdraw the funds.

**Option #2: If the answer is no to the above question** and the event or function is funded through donations or sponsorships, or is a non-University related event, which does not utilize University funding or resources then the payment to the individual would continue to be processed through the Foundation.

**Additional Resources:**

Human Resources and Payroll: <http://www.uwlax.edu/Human-Resources/Unclassified-payroll/>

Accounts Payable and the PIR process: <http://www.uwlax.edu/Accounts-Payable/Forms/>

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