Definitions

Overload and Lump Sum Payment form: internal UW-L form to pay on the university unclassified monthly payroll through HR (sometimes referred to as EOP form).

PIR (Payment to individual form) and ASSA (academic support services agreement): used to pay contractors and individuals who perform a service to UW-L through Business Services.

IIA (Inter-institutional Agreement): used to pay employees of another campus on the UW-L unclassified monthly payroll. Inter-institutional Overload Agreement forms are for full-time employees of other institutions and the standard Inter-institutional form is for all others.

Decision Tree

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<tr>
<th>A. What is the relationship of the person whom we are paying with UW-L/UW System?</th>
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<tbody>
<tr>
<td>a. A current employee of UW-L – classified employee, faculty, grad assistant, etc. or a former employee who has been an employee of UW-L within the current calendar year. <strong>Skip to section E</strong> (lump sum).</td>
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<tr>
<td>b. A student of UW-L. Be sure they are a current student--check WINGS, ask the student if they are still enrolled in classes, or ask HR. <strong>Skip to section D</strong> (Student payroll).</td>
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<td>c. An employee of another UW institution (you always need to ask this!). <strong>Skip to section C</strong> (IIA).</td>
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<td>d. No current relationship. <strong>See section B</strong> (PIR/ASSA).</td>
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<th>B. The person being paid does not have a relationship with UW-L, should they? Does the work establish an employer/employee relationship?</th>
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<tr>
<td>a. Yes, the work is on-going, is supervised or directed by a UW-L employee, and/or has other factors that create an employee relationship. <strong>Skip to section E</strong> (lump sum). Review factors for determining employee relationship by using UW System Employee or Independent Contractor questionnaire (link on HR site) or by contacting HR.</td>
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<tr>
<td>b. No, the work is that of an independent contractor. This may include speakers &amp; guest lecturers in a non-public setting, officials for athletic events, contest judges, or other independent contractors whose service is their principle source of livelihood or profit. <strong>This work can be paid on ASSA/PIR</strong> – contact Business Services for more information.</td>
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C. The person being paid is an employee of another UW System institution (not UW-L). How much will you pay the employee?
   a. $1000 or less. **This should be paid on Overload/lump sum form.** We also require an I-9 form be completed by the employee. If they are unable to complete one while on campus, HR has instructions for completion by an authorized representative. A **non-contract employee form** should be submitted before the work begins.
   b. More than $1000. **This should be paid on IIA.** We also require an I-9 form be completed by the employee. If they are unable to complete one while on campus, HR has instructions for completion by an authorized representative. A **non-contract employee form** should be submitted before the work begins.
      i. The IIA form is filled out by the hiring department, sent for signature to dean/division level and then to Business Services. Business Services sends IIA form to the other campus for signature. The other campus returns it to Business services and it is then sent to HR for payment. Departments should send a copy of the IIA form to HR before it is sent for Dean/Division signature – this will give HR notice of the employee and give HR the opportunity to work with the department in obtaining an I-9.

D. The person being paid is a current student of UW-L. Does the nature of the work establish an employee-employer relationship?
   a. Yes, if the work is on-going and/or is supervised or directed by a UW-L employee. **The student should be paid on the student payroll either hourly or via lump sum.** Contact Mark Flottmeier in HR for more information about student payroll.
   b. No, if the work is that of an independent contractor. This may include speakers, & guest lecturers in a non-public setting, officials for athletic events, contest judges, or other independent contractors whose service is their principle source of livelihood or profit. **This work can be paid on ASSA/PIR** – contact Business Services for more information. **Review factors for determining employee relationship by using UW System Employee or Independent Contractor questionnaire (link on HR site) or by contacting HR.**
E. The person being paid has an employer/employee relationship with UW-L. What type of relationship is it?

   a. He/she is a current employee of UW-L (GA, faculty, academic staff, classified staff). **This should be paid on the Overload/Lump Sum form.** No other forms required.

   b. The work being done establishes an employer/employee relationship and he/she has been an UW-L employee within the past year. **This should be paid on the Overload/Lump Sum form.** No other forms required, but it is good practice to inform the employee that he/she should update address, W-4 withholdings, and direct deposit if there have been several months since the employee last worked.

   c. The work being done establishes an employer/employee relationship and he/she *has not* been an employee of UW-L within the past year. **This should be paid on the Overload/Lump Sum form.** A non-contract employee form should be submitted before the work begins. The employee will be required to complete a criminal background check, I-9 form, W-4 tax form, and direct deposit form BEFORE they begin working. The non-contract employee form is used to inform HR of the new employee and ensure the paperwork is complete long before you submit the Overload/Lump Sum form for payment!

**Helpful Links**

**Please save a link or shortcut to these forms instead of saving the form on your desktop so you have the most up-to-date version.**

Overload/Lump sum form, Inter-institutional forms, and non-contact employee information form: [http://www2.uwlax.edu/Human-Resources/Overload-and-lump-sum-payment-form/](http://www2.uwlax.edu/Human-Resources/Overload-and-lump-sum-payment-form/)

Payment to Individual (PIR): [http://www.uwlax.edu/budgetandfinance/bussys/Docs/PIR_Form.xls](http://www.uwlax.edu/budgetandfinance/bussys/Docs/PIR_Form.xls)

Academic Support Service Agreement (ASSA): [http://www.uwlax.edu/budgetandfinance/contracts/Forms/ASSAForm.pdf](http://www.uwlax.edu/budgetandfinance/contracts/Forms/ASSAForm.pdf)

Student Payroll: [http://www2.uwlax.edu/Human-Resources/Student-payroll/](http://www2.uwlax.edu/Human-Resources/Student-payroll/)

I-9 Form: [http://www2.uwlax.edu/uploadedFiles/Offices-Services/Human_Resources/I-9.pdf](http://www2.uwlax.edu/uploadedFiles/Offices-Services/Human_Resources/I-9.pdf)

New Employee Paperwork: [http://www2.uwlax.edu/Human-Resources/New-hire-forms/](http://www2.uwlax.edu/Human-Resources/New-hire-forms/)