

# FIN – Request for Payment to Individual Webform

Instructions and Guidance

Last revised 2/15/2024

# In this Guide...

Topic	Slide Number
Gathering Payee Information	2
Payment to Individual (PTI) Webform: Allowable Payment Types	4
Completing the PTI Webform for <b>Human Subject Payments</b>	7
Completing the PTI Webform for <b>Refunds and Reimbursements</b>	27
Completing the PTI Webform for <b>All Other Payment Types</b>	48
What to do when you receive the No Matching Results message	69
Frequently Asked Questions	72

# Gathering Payee Information

## For most payments, payee information must be submitted to Procurement prior to the payment request being submitted.

- Domestic individuals and entities must complete UD's [online W-9 form](#).
- Foreign individuals and entities must complete an [IRS W-8 form](#) and UD's [Supplier Data Collection form](#).
- These forms provide the information Procurement needs to create a supplier profile to remit payment, **and** when applicable send 1099 forms to the payee.

**Exceptions** to this requirement are detailed in the descriptions for each payment type in this guide **if applicable**.

# Payment to Individual (PTI) Webform: Allowable Payment Types

**Most payments made by Procurement are managed in UD Exchange and Concur, however, there are some circumstances in which you will need to use the PTI Webform:**

- Making Human Subject Payments to individuals are not registered as suppliers in UD Exchange
- Paying reimbursements to non-employees who are not registered as suppliers in UD Exchange
- Paying refunds
- Limited types of payments to matriculated UD students and UD employees

The [Non-PO Payment Matrix](#) outlines Procurement payment types, payee types, and payment vehicles that do not require a Purchase Order (PO).

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu)

Symbol Key: \* Required Information, ! Error

Business unit: \* UNIVERSITY OF DELAWARE (UOD01) ▼  
Department: \* PROCUREMENT SERVICES (04750) ▼  
Payment is for: \* Choose one  
Choose one  
Athletic Officials  
Awards  
Honoraria  
Human Subject Participant  
Participant Support  
Refund  
Reimbursement  
REU  
Royalty  
Amount per payee:  
Purpose for payment:  
Special instructions:  
Attachment(s): Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB).  
Choose File No file chosen  
Choose File No file chosen  
[more attachments](#)  
☐ Additional attachments sent via separate cover

Once you have reviewed the [Non-PO Payment Matrix](#) and determined that the correct payment vehicle for the payment type *and* payee type is the PTI Webform, open the Webform and begin by selecting your payment type from the **Payment is for** menu.

Allowable PTI Webform payment types and payees are further defined in the “How To” sections of this guide.



# How to Complete the PTI Webform for **Human Subject Payments**



# Human Subject Payments

## Compensation for participation in sponsored or non-sponsored human subjects research requiring IRB review.

- Human Subject is defined as a living individual about whom an investigator (whether professional or student) conducting research obtains information or biospecimens through intervention or interaction with the individual, and uses, studies, or analyzes the information or biospecimens; or obtains, uses, studies, analyzes, or generates identifiable private information or identifiable biospecimens.

### Required Information from Payee:

- UD Students, Employees, and Student Employees must complete a **W-9/W-8 & SDC form**
- 3<sup>rd</sup> Party Individuals - you may enter their **SSN, name, and address** in the PTI webform for them to receive a **check** payment.

### Pay via Payment to Individual Webform:

UD Students  
Employees  
Student Employees  
3<sup>rd</sup> Party Individuals

### Pay via Other Method:

UDX Non-PO Payment Form for Human Subject Payment

- ONLY** use this method for **3<sup>rd</sup> Party Individuals** if the payee is **ALREADY** a registered supplier in UDX

**Required Attachments:** Completed Research Participant Compensation Form

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu)

Symbol Key: \* Required Information, ! Error

Business unit: \* UNIVERSITY OF DELAWARE (UOD01)
Department: \* PROCUREMENT SERVICES (04750)
Payment is for: \* Choose one
Amount per payee:
Purpose for payment: \*
Special instructions:
Attachment(s): Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB).

Choose one
Athletic Officials
Awards
Honoraria
Human Subject Participant
Participant Support
Refund
Reimbursement
REU
Royalty

Choose File No file chosen
Choose File No file chosen
[more attachments](#)
☐ Additional attachments sent via separate cover

Select your payment type from the **Payment is for** menu.



## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Business unit:	* UNIVERSITY OF DELAWARE (UOD01) ▼
Department:	* PROCUREMENT SERVICES (04750) ▼
Payment is for:	* Human Subject Participant ▼
Amount per payee:	* \$25
Purpose for payment:	* <div>                 Short description:                  Participation in a procurement study                  Long description:                  HSP Payment for participation in a procurement study             </div>
Special instructions:	
Attachment(s):	Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB). <div> <input type="button" value="Choose File"/> No file chosen  <input type="button" value="Choose File"/> No file chosen  <a href="#">more attachments</a>  <input type="checkbox"/> Additional attachments sent via separate cover             </div>

- Complete the required information on the form
- Upload any attachments required for supporting documentation
- Click **Next Step**



Is payee a US Citizen? \* ☒ Yes, ☐ NoIf No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.

[\(lookup\)](#) [\(clear\)](#)

Or, enter the payee information below.


UD ID:  [\(lookup\)](#)

- OR -

First Name: Middle Name: Last Name: \* Suffix:  Choose one ▼Taxpayer ID:  (use format nnn-nn-nnnn)Address line 1: \* Address line 2: Address line 3: City: \* State: \*  Choose one ▼Zip Code: \* Country: \*  USA (USA) ▼E-mail: Phone:  (use format nnn-nnn-nnnn)Fax:  (use format nnn-nnn-nnnn)**Click **Lookup** in the Payee Short Name section of the page**[Previous step](#)[Save & exit  
\(not submitted\)](#)[Exit without saving](#)[Next step](#)



Enter all or part of the Vendor/Payee name:   
(Use last name for individuals)

Next step 

- Search for your payee
- Click **Next Step**

**Active vendors**

Only select a vendor from this box if available. If the vendor is not on the Active vendor list, please proceed to the Inactive vendor box below.

PICKKRIS-002: PICKERING, KRISTEN ASTRID 201 ALTAIR WAY BEAR, DE  
PICKNORA-001: PICKERING, NORA MARY 28 CHARLES PT NEWARK, DE  
PICKSUSA-001: PICKERING, SUSAN L 28 CHARLES PT NEWARK, DE

If your Payee is listed as an **Active Vendor**:

- Select the payee and Click **Submit**
- Proceed to **Slide 14**

**Inactive vendors**

Only select a vendor from the Inactive vendors list if they are NOT available in the Active vendors list above. If the vendor is in neither list, select *Vendor Not Listed* from the Inactive vendor list.

\*\*Vendor Not Listed  
PICKDAVI-001:  
PICKJANE-001  
PICKJOSE-001  
WILMERCU-00  
WILMERCU-00

Submit

If your Payee is listed as an **Inactive Vendor**, there are two options:

- **For UD Students, Employees, and Student Employees**, you must ask them to complete a new **W-9/W-8 & SDC form**, and their record must be updated and activated before you can proceed with completing and submitting the PTI Webform. If you do not, the form will be returned to you.
- **For 3<sup>rd</sup> Party Individuals**, you may click **Close Window** and skip to **Slide 20** for instructions to request a **check** payment by typing in the payee's **SSN, Name, and Address**.
  - This is also an option for a 3<sup>rd</sup> Party Individual who does not appear in either list.

Is payee a US Citizen? \*

☒ Yes, ☐ NoIf No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name:

Use the lookup to obtain a payee short name and click 'Add line' after each payee.

PICKERING,KRISTEN ASTRID (PICKKRIS-002) [lookup](#) [clear](#)

Or, enter the payee information below.

UD ID:

 [lookup](#)

- OR -

First Name:

Middle Name:

Last Name: \*

Suffix:

Taxpayer ID:

 (use format nnn-nn-nnnn)

Address line 1: \*

Address line 2:

Address line 3:

City: \*

State: \*

Zip Code: \*

Country: \*

E-mail:

Phone:

 (use format nnn-nnn-nnnn)

Fax:

 (use format nnn-nnn-nnnn)Click **Add Line**[Previous step](#)[Save & exit  
\(not submitted\)](#)[Exit without saving](#)[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

Payee	Citizen	Eligibility for Payment Form	Amount	Action
UOD01 PICKRRIS-002 Pickering, Kristen Astrid	Y	n/a	\$25.00	<a href="#">delete</a>
TOTAL			\$0.00	

### Add a payee

Is payee a US Citizen? ☐ Yes, ☐ No

If No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
(lookup) (clear)

Or, enter the payee information below.

UD ID:  (lookup)

- OR -

First Name:

Middle Name:

Last Name:

Suffix:  Choose one

Taxpayer ID:  (use format xxx-xx-xxxx)

Address line 1:

Address line 2:

Address line 3:

City:

State:  Choose one

Zip Code:

Country:  USA (USA)

E-mail:

Phone:  (use format xxx-xxx-xxxx)

Fax:  (use format xxx-xxx-xxxx)

[Add line](#)

Click Next Step

[Previous step](#)

[Save & exit](#)

[Exit without saving](#)

[Next step](#)



## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Amount per payee: \$25.00

Funding per payee: You may enter up to 6 SpeedCharts.

Item Category/Account	SpeedChart	User Field	Amount
HUMAN SUBJECT PAYMENT <a href="#">(lookup)</a> <a href="#">(clear)</a>	EURC110000 <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	25.00
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/>
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/>
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/>
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/>
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/>
TOTAL			\$25.00

[Previous step](#)
[Save & exit \(not submitted\)](#)
[Exit without saving](#)
[Next step](#)

- Complete your funding information
- Click **Next Step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Funding detail:

Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
HUMAN SUBJECT PAYMENT	<a href="#">PURC110000</a>	<a href="#">149250</a>		<input type="text"/> (lookup)	<input type="text"/> (lookup)	\$25.00
Total						\$25.00

Additional comments:

[Previous step](#)

[Save & exit](#)  
(not submitted)

[Exit without saving](#)

[Next step](#)

- Review your funding details
- Click **Next Step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

<b>Business unit:</b>		UNIVERSITY OF DELAWARE (UOD01)					
<b>Department:</b>		PROCUREMENT SERVICES (04750)			<b>Prepared by:</b>		Martin, Margot Elizabeth McCabe
<b>Payment is for:</b>		Human Subject Participant			<b>Invoice number:</b>		
<b>Purpose:</b>		Participation in a procurement study HSP payment for Participation in a procurement study			<b>Special instructions:</b>		
					<b>Attachments:</b>		

Payee(s)								
Name and address	US Citizen	Eligibility for Payment Form	Amount		Name and address	US Citizen	Eligibility for Payment Form	Amount
UOD01 PICKKRIS-002 Pickerina, Kristen Astrid	Y	n/a	\$25.00					

Funding						
Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
HUMAN SUBJECT PAYMENT	PURC110000	149250				\$25.00
<b>Total per payee</b>						\$ 25.00
<b>Total funding</b>						\$ 25.00

**Additional comments:**

[Previous step](#)

[Save & exit  
\(not submitted\)](#)

[Exit without saving](#)

[Next step](#)

- Review your request
- Click **Next Step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

- Select your Account Code Administrator and any additional approvers as needed
  - If paying Participant Support on a Federal Grant, see **Slide 72** for details.
- Click **Submit Form**

### Routing and Authorization

Role	E-mail Address	Completed On
Form Originator	<--> <a href="#">Martin, Margot Elizabeth McCabe</a>	
Approver ▼	<input type="text"/> (lookup)	
Approver ▼	<input type="text"/> (lookup)	
Approver ▼	<input type="text"/> (lookup)	
Approver ▼	<input type="text"/> (lookup)	
Account Code Administrator	<b>Walueff, George S ▼</b> ←	
Final Approver	<a href="#">PayIndy RPI 2</a>	
Copy	<a href="#">Martin, Margot Elizabeth McCabe</a>	

Previous step

Save & exit  
(not submitted)

Exit without saving

Submit form

How to Continue the PTI Webform for:  
**3<sup>rd</sup> Party** Human Subject Payments  
to be paid via **Check**  
Using only **SSN, Name, and Address**

## Add a payee

Is payee a US Citizen? \* ☐ Yes, ☐ No

If No, has eligibility for payment been verified by ISSS? ☐ Yes, ☐ No

Please note: Procurement requires the IRS W8 and Supplemental Data Collection Form to pay foreign citizens taxable income, or a refund/reimbursement via wire transfer; please send completed forms to [procurement@udel.edu](mailto:procurement@udel.edu) prior to completing this payment request.

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.

[\(lookup\)](#) [\(clear\)](#)

Or, enter the payee information below.

UD ID:  [\(lookup\)](#)

- OR -

First Name:

Middle Name:

Last Name:

Suffix:

Taxpayer ID:  (use format nnn-nn-nnnn)

Address line 1:

Address line 2:

Address line 3:

City:

State:

Zip Code:

Country: \*

E-mail:

Phone:  (use format nnn-nnn-nnnn)

Fax:  (use format nnn-nnn-nnnn)

If you are requesting a Human Subject Participant payment for a payee that is **NOT** a UD Student, Employee, or Student Employee:

- You may proceed by typing in the payee's **SSN, Name, and Address**.
  - This method will result in a check being mailed to the payee
- Click **Add Line**.

[Previous step](#)

[Save & exit  
\(not submitted\)](#)

[Exit without saving](#)

[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information ! Error

Payee	Citizen	Eligibility for Payment Form	Amount	Action
UOD01 Kuhnert, Kathryn (302) 831-2161	Y	n/a	\$25.00	<a href="#">edit</a> <a href="#">delete</a>
TOTAL			\$0.00	

### Add a payee

Is payee a US Citizen? ☐ Yes, ☐ No  
If No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
(lookup) (clear)

Or, enter the payee information below:

UD ID:  (lookup)

- OR -

First Name:

Middle Name:

Last Name:

Suffix:  Choose one

Taxpayer ID:  (use format nnn-xx-xxxx)

Address line 1:

Address line 2:

Address line 3:

City:

State:  Choose one

Zip Code:

Country:  USA (USA)

E-mail:

Phone:  (use format nnn-xxx-xxxx)

Fax:  (use format nnn-xxx-xxxx)

[Add line](#)

Click Next Step

[Previous step](#)

[Save & exit](#)

[Exit without saving](#)

[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Amount per payee: \$25.00

Funding per payee: You may enter up to 6 SpeedCharts.

Item Category/Account	SpeedChart	User Field	Amount
HUMAN SUBJECT PAYMENT - 149250 (lookup) (clear)	FURC110000 (lookup)	(lookup)	25.00
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
TOTAL			\$25.00

Previous step

Save & exit  
(not submitted)

Exit without saving

Next step

- Complete your funding information
- Click **Next Step**



## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Funding detail:	Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
	HUMAN SUBJECT PAYMENT	<a href="#">PURC110000</a>	<a href="#">149250</a>		<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	\$25.00
Total							\$25.00

Additional comments:

[Previous step](#)
[Save & exit  
\(not submitted\)](#)
[Exit without saving](#)
[Next step](#)

- Review your funding details
- Click **Next Step**

Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu)

Symbol Key: \* Required Information, ! Error

Business unit:	UNIVERSITY OF DELAWARE (UOD01)						
Department:	PROCUREMENT SERVICES (04750)			Prepared by: Kuhnert,Kathryn			
Payment is for:	Human Subject Participant			Invoice number:			
Purpose:	Participation in a procurement study			Special instructions:			
			Attachments:				

Payee(s)								
Name and address	US Citizen	Eligibility for Payment Form	Amount		Name and address	US Citizen	Eligibility for Payment Form	Amount
UOD01 Kuhnert, Kathryn [REDACTED]	Y	n/a	\$25.00					

Funding						
Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
HUMAN SUBJECT PAYMENT	<a href="#">PURC110000</a>	<a href="#">149250</a>				\$25.00
Total per payee						\$ 25.00
Total funding						\$ 25.00
Additional comments:						

- Review your request
- Click **Next Step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu)

Symbol Key: \* Required Information, ! Error

### Routing and Authorization

Role	E-mail Address	Completed On
Form Originator	<---> <a href="#">Kuhnert Kathryn</a>	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Account Code Administrator	<input type="text" value="Drag Amy"/> ←	
Final Approver	<a href="#">PayIndv RPI 2</a>	
Copy	<a href="#">Kuhnert Kathryn</a>	

[◀ Previous step](#)
[💾 Save & exit \(not submitted\)](#)
[✕ Exit without saving](#)
[✔ Submit form](#)

- Select your Account Code Administrator and any additional approvers as needed
  - If paying Participant Support on a Federal Grant, see **Slide 72** for details.
- Click **Submit Form**

# How to Complete the PTI Webform for **Refunds & Reimbursements**

# Refund

**Money returned to any payee which was originally received by UD and is returned from UD funds**

- Refunds are non-taxable and are limited to the exact amount on the provided documentation.

## **Required Information from Payee:**

You should *always* use the **Payee Short Name lookup** to see if the payee already has an active supplier profile to use with webforms, and if so, select that result.

- If the payee has a supplier profile in webforms but it is **inactive**, they will need to complete a new **W-9/W-8 & SDC form** to receive their payment via ACH instead of check.

Because most refunds and reimbursements are not taxable, as an alternative to the above process, you can simply enter the **payee's name and address** into the PTI Webform to send them a **check** payment without requesting that they submit a W-9/W-8 & SDC form. Refunds and reimbursements are the **ONLY** payment types where this is allowable.

### **Pay via Payment to Individual Webform:**

All Payee Types

### **Pay via Other Method:**

- If a **3<sup>rd</sup> Party** payee is **already** a registered supplier in UDX
- UDX Non-PO Payment Form, Refund payment type

**Required Attachments:** Original CT or accounting showing reason for refund

# Reimbursement

Money paid for allowable out-of-pocket expenses incurred on behalf of the University. Examples: A job candidate paid for their travel to UD or a Resident Assistant bought supplies for a student program. Reimbursements are non-taxable and are limited to the exact total of the receipts provided.

## Required Information from Payee:

You should *always* use the **Payee Short Name lookup** to see if the payee already has an active supplier profile to use with webforms, and if so, select that result.

- If the payee has a supplier profile in webforms but it is **inactive**, they will need to complete a new **W-9/W-8 & SDC form** to receive their payment via ACH instead of check.

Because most refunds and reimbursements are not taxable, as an alternative to the above process, you can simply enter the **payee's name and address** into the PTI Webform to send them a **check** payment without requesting that they submit a W-9/W-8 & SDC form. Refunds and reimbursements are the **ONLY** payment types where this is allowable.

Pay via Payment to Individual Webform:	Pay via Other Method:
All Payee Types	<b>Employees</b> – Concur <b>If a Non-Employee payee is <i>already</i> a registered supplier in UDX</b> - Non-PO Payment Form, Travel and Business Expense payment type

**Required Attachments:** Invoice by supplier or receipts if reimbursing an individual

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu)

Symbol Key: \* Required Information, ! Error

Business unit: \* UNIVERSITY OF DELAWARE (UOD01) ▼

Department: \* PROCUREMENT SERVICES (04750) ▼

Payment is for: \* 

Choose one ▼  
Choose one  
Athletic Officials  
Awards  
Honoraria  
Human Subject Participant  
Participant Support  
Refund  
Reimbursement  
REU  
Royalty

Amount per payee:

Purpose for payment: \*

Special instructions:

Attachment(s): Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB).

No file chosen  
 No file chosen  
[more attachments](#)

☐ Additional attachments sent via separate cover

Select your payment type from the **Payment is for** menu.

(not submitted)

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Business unit: \* UNIVERSITY OF DELAWARE (UOD01) ▼

Department: \* PROCUREMENT SERVICES (04750) ▼

Payment is for: \* Refund ▼

Amount per payee: \* \$50

Purpose for payment: \* Short description:  
Refund of gift  
Long description:  
Details regarding refund of gift....

Special instructions:

Attachment(s): Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB).  
Choose File | No file chosen  
Choose File | No file chosen  
[more attachments](#)  
☐ Additional attachments sent via separate cover

- Complete the required information on the form
- Upload any attachments required for supporting documentation
- Click **Next Step**

Save & exit  
(not submitted)

Exit without saving

Next step



Is payee a US Citizen? \* ☒ Yes, ☐ NoIf No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.

[lookup](#) [clear](#)

Or, enter the payee information below.


UD ID:  [lookup](#)

- OR -

First Name: Middle Name: Last Name: \* Suffix:  Choose one ▼Taxpayer ID:  (use format nnn-nn-nnnn)Address line 1: \* Address line 2: Address line 3: City: \* State: \*  Choose one ▼Zip Code: \* Country: \*  USA (USA) ▼E-mail: Phone:  (use format nnn-nnn-nnnn)Fax:  (use format nnn-nnn-nnnn)Click **Lookup** in the Payee Short Name section of the page[Previous step](#)[Save & exit  
\(not submitted\)](#)[Exit without saving](#)[Next step](#)



Enter all or part of the Vendor/Payee name:   
(Use last name for individuals)

Next step 

- Search for your payee
- Click **Next Step**

Active vendors

Only select a vendor from this box if available. If the vendor is not on the Active vendor list, please proceed to the Inactive vendor box below.

PICKKRIS-002: PICKERING, KRISTEN ASTRID  
PICKNDRA-001:  
PICKSUSA-001:

If your Payee is listed as an **Active Vendor**:

- Select the payee and Click **Submit**
- Proceed to **Slide 35**

Inactive vendors

Only select a vendor from the inactive vendors list if they are NOT available in the Active vendors list above. If the vendor is in neither list, select Vendor Not Listed from the Inactive vendor list.

\*\*Vendor Not Listed  
PICKDAVI-001:  
PICKJANE-001:  
PICKJOSE-001:  
WILMERCU-00'  
WILMERCU-00'

Submit

If your Payee is listed as an **Inactive Vendor**, there are two options:

- You may ask them to complete a new **W-9/W-8 & SDC form**, and their record must be updated and activated before you can proceed with completing and submitting the PTI Webform. If you do not, the form will be returned to you.
- Alternatively, you may click **Close Window** and skip to **Slide 41** for instructions to request a **check** payment by typing in the payee's **Name and Address**.
  - This is also an option for a payee who does not appear in either list.

Is payee a US Citizen? \* ☒ Yes, ☐ NoIf No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name:

Use the lookup to obtain a payee short name and click 'Add line' after each payee.

PICKERING,KRISTEN ASTRID (PICKKRIS-002) [lookup](#) [clear](#)

Or, enter the payee information below.

UD ID:  [lookup](#)

- OR -

First Name: Middle Name: Last Name: \* Suffix: Taxpayer ID:  (use format nnn-nn-nnnn)Address line 1: Address line 2: Address line 3: City: \* State: \* Zip Code: \* Country: \* E-mail: Phone:  (use format nnn-xxx-nnnn)Fax:  (use format nnn-xxx-nnnn)**Click Add Line**[Previous step](#)[Save & exit  
\(not submitted\)](#)[Exit without saving](#)[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

Payee	Citizen	Eligibility for Payment Form	Amount	Action
UOD01 PICKKRIS-002 Pickering, Kristen Astrid	Y	n/a	\$50.00	<a href="#">delete</a>
TOTAL			\$50.00	

### Add a payee

Is payee a US Citizen? ☐ Yes, ☐ No

If No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
(lookup) (clear)

Or, enter the payee information below.

UD ID:  (lookup)

- OR -

First Name:

Middle Name:

Last Name:

Suffix:  Choose one ▼

Taxpayer ID:  (use format xxx-xx-xxxx)

Address line 1:

Address line 2:

Address line 3:

City:

State:  Choose one ▼

Zip Code:

Country:  USA (USA) ▼

E-mail:

Phone:  (use format xxx-xxx-xxxx)

Fax:  (use format xxx-xxx-xxxx)

[Add line](#)

Click Next Step

[Previous step](#)

[Save & exit](#)

[Exit without saving](#)

[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Amount per payee: \$50.00

Funding per payee: You may enter up to 6 SpeedCharts.

Item Category/Account	SpeedChart	User Field	Amount
REFUND - GIFTS - R08100 (lookup) (clear)	PURC110000 (lookup)	(lookup)	25.00
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
TOTAL			\$ 25.00

Previous step

Save & exit  
(not submitted)

Exit without saving

Next step

- Complete your funding information
- Click **Next Step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

### Funding detail:

Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
REFUND - GIFTS	<a href="#">PURC110000</a>	<a href="#">R08100</a>		<input type="text"/> (lookup)	<input type="text"/> (lookup)	\$50.00
Total						\$50.00

Additional comments:

[Previous step](#)

[Save & exit](#)  
(not submitted)

[Exit without saving](#)

[Next step](#)

- Review your funding details
- Click **Next Step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

<b>Business unit:</b> UNIVERSITY OF DELAWARE (UOD01)	
<b>Department:</b> PROCUREMENT SERVICES (04750)	<b>Prepared by:</b> Martin,Margot Elizabeth McCabe
<b>Payment is for:</b> Refund	<b>Invoice number:</b>
<b>Purpose:</b> Refund of gift Details regarding refund of gift....	<b>Special instructions:</b>
	<b>Attachments:</b>

Payee(s)								
Name and address	US Citizen	Eligibility for Payment Form	Amount		Name and address	US Citizen	Eligibility for Payment Form	Amount
UOD01 PICKKRIS-002 Pickering, Kristen Astrid	Y	n/a	\$50.00					

Funding						
Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
REFUND - GIFTS	<a href="#">PURC110000</a>	<a href="#">R08100</a>				\$50.00
Total per payee						\$ 50.00
Total funding						\$ 50.00

Additional comments:

[Previous step](#)

[Save & exit](#)  
(not submitted)

[Exit without saving](#)

[Next step](#)

- Review your request
- Click **Next Step**



## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

- Select your Account Code Administrator and any additional approvers as needed
- Click **Submit Form**

### Routing and Authorization

Role	E-mail Address	Completed On
Form Originator	<--> <a href="#">Martin, Margot Elizabeth McCabe</a>	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Account Code Administrator	<b>Walueff, George S ▾</b> ←	
Final Approver	<a href="#">PayIndv RPI 2</a>	
Copy	<a href="#">Martin, Margot Elizabeth McCabe</a>	

1 Previous step

Save & exit  
(not submitted)

X Exit without saving

✓ Submit form

How to Continue the PTI Webform for:  
**Refunds & Reimbursements** to be Paid via **Check**  
Using only **Name and Address**

Is payee a US Citizen? \* ☒ Yes, ☐ NoIf No, has eligibility for payment been verified by ISSS? ☐ Yes, ☐ No

Please note: Procurement requires the IRS W8 and Supplemental Data Collection Form to pay foreign citizens taxable income, or a refund/reimbursement via wire transfer; please send completed forms to [procurement@udel.edu](mailto:procurement@udel.edu) prior to completing this payment request.

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.

[\(lookup\)](#) [\(clear\)](#)

Or, enter the payee information below.

UD ID:  [\(lookup\)](#)

- OR -

First Name: Middle Name: Last Name: \* Suffix: Taxpayer ID:  (use format nnn-nn-nnnn)Address line 1: \* Address line 2: Address line 3: City: \* State: \* Zip Code: \* Country: \* E-mail: Phone:  (use format nnn-nnn-nnnn)Fax:  (use format nnn-nnn-nnnn)[Add line](#)

If you are requesting a Refund or Reimbursement:

- You may proceed by typing in the payee's **SSN, Name, and Address**.
  - This method will result in a check being mailed to the payee
- Click **Add Line**.

[◀ Previous step](#)[Save & exit  
\(not submitted\)](#)[✕ Exit without saving](#)[Next step ▶](#)

Request ID: 5214639

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

Payee	Citizen	Eligibility for Payment Form	Amount	Action
Single Payment Vendor U0001 Kuhnert, Kathryn	Y	n/a	\$50.00	<a href="#">edit</a> <a href="#">delete</a>
TOTAL			\$0.00	

### Add a payee

Is payee a US Citizen? \* ☐ Yes, ☐ No  
If No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
(lookup) (clear)

Or, enter the payee information below.

UD ID:  (lookup)

- OR -

First Name:

Middle Name:

Last Name: \*

Suffix:  Choose one ▼

Taxpayer ID:  (use format xxx-xx-xxxx)

Address line 1:

Address line 2:

Address line 3:

City: \*

State: \*  Choose one ▼

Zip Code: \*

Country: \*  USA (USA) ▼

E-mail:

Phone:  (use format xxx-xxx-xxxx)

Fax:  (use format xxx-xxx-xxxx)

[Add line](#)

Click Next Step

[Previous step](#) [Save & exit](#) [Exit without saving](#)

[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

- Complete your funding information
- Click **Next Step**

Symbol Key: \* Required Information, ! Error

**Amount per payee:** \$50.00

**Funding per payee:** You may enter up to 6 SpeedCharts.

Item Category/Account	SpeedChart	User Field	Amount
REFUND - GIFTS - R08100 <a href="#">(lookup)</a> <a href="#">(clear)</a>	PURC110000 <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	25.00
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	
<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	<input type="text"/> <a href="#">(lookup)</a>	
<b>TOTAL</b>			\$ 25.00

[Previous step](#)

[Save & exit  
\(not submitted\)](#)

[Exit without saving](#)

**Next step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

- Review your funding details
- Click **Next Step**

Symbol Key: \* Required Information, ! Error

### Funding detail:

Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
REFUND - GIFTS	<a href="#">PURC110000</a>	<a href="#">R08100</a>		<input type="text"/> (lookup)	<input type="text"/> (lookup)	\$50.00
Total						\$50.00

### Additional comments:

◀ Previous step

📁 Save & exit  
(not submitted)

✕ Exit without saving

Next step ▶

## Request for Payment to Individual

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Business unit:		UNIVERSITY OF DELAWARE (UOD01)						
Department:		PROCUREMENT SERVICES (04750)			Prepared by:			Kuhnert,Kathryn
Payment is for:		Refund			Invoice number:			
Purpose:		Refund of gift Details regarding refund of gift....			Special instructions:			
					Attachments:			

Payee(s)								
Name and address	US Citizen	Eligibility for Payment Form	Amount		Name and address	US Citizen	Eligibility for Payment Form	Amount
Single Payment Vendor UOD01 Kuhnert, Kathryn 123 South Chapel Street Newark,DE 19716 E-mail: Ph: 3022214890	Y	n/a	\$50.00					

Funding						
Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
REFUND - PROGRAMS	<a href="#">PURC110000</a>	<a href="#">R12600</a>				\$50.00
Total per payee						\$ 50.00
Total funding						\$ 50.00

Additional comments:

[Previous step](#)

[Save & exit](#)  
(not submitted)

[Exit without saving](#)

[Next step](#)

- Review your request
- Click **Next Step**

**Request for Payment to Individual**

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

**Routing and Authorization**

Role	E-mail Address	Completed On
Form Originator	<---> <a href="#">Kuhnert, Kathryn</a>	
Approver ▼	<input type="text"/> (lookup)	
Approver ▼	<input type="text"/> (lookup)	
Approver ▼	<input type="text"/> (lookup)	
Approver ▼	<input type="text"/> (lookup)	
Account Code Administrator	<input type="text" value="Drag, Amy"/> ←	
Final Approver	<a href="#">PayIndv RPL 2</a>	
Copy	<a href="#">Kuhnert, Kathryn</a>	

[Previous step](#)[Save & exit  
\(not submitted\)](#)[Exit without saving](#)[Submit form](#)

- Select your Account Code Administrator and any additional approvers as needed
- Click **Submit Form**



# How to Complete the PTI Webform for **All Other Payments**

# Athletics Officials

**Used by Athletics employees to pay an individual who officiates at a UD sporting event**

## **Required Information from Payee:**

- UD Students and 3rd Parties must complete the **W-9/W-8 & SDC form**
- UD Employees and Student Employees are paid via Payroll Supplemental Pay and do not need to complete the W-9/W-8 & SDC form

### **Pay via Payment to Individual Webform:**

### **Pay via Other Method:**

**UD Students**

**Employees** – Payroll Supplemental Pay  
**Student Employees** – Payroll Supplemental Pay  
**3<sup>rd</sup> Parties**– UDX Non-PO Payment Form -  
Specialized Non-PO Services payment type

**Required Attachments:** Invoice and/or any other documentation needed if audited

# Awards

**Cash award or prize for achievement, performance or competition for programs and activities that support the primary missions of the University**

**Required Information from Payee:**

- UD Students and 3rd Parties must complete the **W-9/W-8 & SDC form**
- UD Employees and Student Employees are paid via Payroll Supplemental Pay and do not need to complete the W-9/W-8 & SDC form

**Pay via Payment to Individual Webform:**

**UD Students**

**Pay via Other Method:**

**Employees** – Payroll Supplemental Pay  
**Student Employees** – Payroll Supplemental Pay  
**3<sup>rd</sup> Parties** (including Hen Hatch Competition Awards paid to non-individuals/groups) – UDX Non-PO Payment Form, Award/Prize payment type

**Required Attachments:** Award Letter

# Honoraria

Please read the below notes on Honoraria before proceeding:

An Honorarium can only be paid to an individual, **NOT** an entity

An honorarium **CANNOT** be used to pay independent contractors, consultants, or employees

The sum of an honorarium amount is discretionary:

- This payment should **NOT** be negotiated.
- If there is a negotiation and/or contract, a requisition should be entered in UD Exchange to dispatch a purchase order for the appropriate services.
- The sum should **NOT** be characterized as lost fees or wages, expenses, or other opportunity costs incurred by the individual, but rather to the amount of recognition appropriate for the engagement.

The payment is made payable to the individual who participated in the University activity

The University does **NOT** make charitable contributions to organizations in lieu of an honorarium payment

# Honoraria

An honorarium is a one-time, ex gratia payment made to an individual with scholarly or professional expertise who is not an employee of the University. It is provided as a token of appreciation or “thank you” for voluntary, non-recurring participation in the University’s educational, research, or public service activities, for which a fee is not legally or traditionally required and when there is no contractual obligation to pay for services rendered.

## Required Information from Payee:

- UD Students and 3rd Party Individuals must complete the **W-9/W-8 & SDC form**
- Student Employees are paid via Payroll Supplemental Pay and do not need to complete the W-9/W-8 & SDC form

### Pay via Payment to Individual Webform:

**UD Students** - rarely paid an honorarium.

### Pay via Other Method:

**Student Employees** – Payroll Supplemental Pay  
**3<sup>rd</sup> Party Individuals** – UDX, Honorarium Request Form

Employees and 3<sup>rd</sup> Party Entities are **NOT** eligible for Honoraria payments

**Required Attachments:** Communication arranging the activity, flyer advertising the speaker or other documentation prepared prior to the event’s occurrence

# Participant Payment

## Payment to an individual or entity for providing information or data through interaction with UD

- The activities of such participants may include but are not limited to: joining in collaborations; attending training; providing subject-matter expertise; providing input or feedback on shared information, or similar contributions.

### Required Information from Payee:

- All payee types must complete the **W-9/W-8 & SDC form**

#### Pay via Payment to Individual Webform:

**Employees**  
**UD Students**  
**Student Employees**

#### Pay via Other Method:

**3<sup>rd</sup> Parties** – UDX Non-PO Payment Form,  
Participant Payment payment type

**Required Attachments:** Documentation of Expense as required by grant; for non-REU stipends on the PTI Webform, the letter to the student accepting their participation in the program.

# Participant Support Cost (Grants Only)

Payments provided to a study participant or to a workshop attendee from the grant to an individual or to a vendor on behalf of the individual, involving direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of participants or trainees in connection with meetings, conferences, symposia, or training projects.

- Participants may include students, scholars, and scientists from other institutions, representatives of private sector companies, teachers, and state or local government agency personnel but **not** employees of the University of Delaware.

## Required Information from Payee:

- All payee types must complete the **W-9/W-8 & SDC form**

### Pay via Payment to Individual Webform:

UD Students  
Student Employees

### Pay via Other Method:

**3<sup>rd</sup> Parties** – UDX Non-PO Payment Form -  
Participant Support Cost payment type

Employees are **NOT** eligible for Participant Support Cost payments

**Required Attachments:** Documentation of expense as required by grant; for non-REU stipends, the letter to the student accepting their participation in the program.

# REU (Research Experience for Undergraduates)

A specific program of the [National Science Foundation](#), the Research Experience for Undergraduates should only be selected when the purpose code includes the abbreviations NSF and REU.

- For Non-REU research-related stipends the Participant Support payment type should be selected instead
- Non-Research related stipends for Employees are paid via Payroll Supplemental Pay

## Required Information from Payee:

- UD Students, Student Employees, and Non-UD Students must complete the **W-9/W-8 & SDC form**

### Pay via Payment to Individual Webform:

**UD Students**  
**Student Employees**

### Pay via Other Method:

**Non-UD Students** – UDX Non-PO Payment Form -  
Stipend/REU payment type

Non-Student Employees and 3<sup>rd</sup> Party Entities are **NOT** eligible for REU payments

**Required Attachments:** Agreement/Fee documentation, such as the letter to the student accepting their participation in the program



# Royalty

**Any University-related, non-employee royalty paid to authors, or patent fee paid to inventors. This includes any fees paid to obtain the rights to produce plays.**

**Required Information from Payee:**

- All payee types must complete the **W-9/W-8 & SDC form**

**Pay via Payment to Individual Webform:**

**Employees**  
**UD Students**  
**Student Employees**

**Pay via Other Method:**

**3<sup>rd</sup> Parties** – UDX Non-PO Payment Form,  
Royalty payment type

**Required Attachments:** Royalty Agreement/fee documentation or Invoice from license

If you have questions, contact Procurement Services at [procurement@udel.edu](mailto:procurement@udel.edu).

Symbol Key: \* Required Information, ! Error

Business unit: \* UNIVERSITY OF DELAWARE (UOD01) ▾

Department: \* PROCUREMENT SERVICES (04750) ▾

Payment is for: \* Choose one ▾

Amount per payee: \* Choose one

Purpose for payment: \* Athletic Officials

Special instructions: \* Awards

Attachment(s): \* Honoraria

Human Subject Participant

Participant Support

Refund

Reimbursement

REU

Royalty

Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB).

Choose File No file chosen

Choose File No file chosen

[more attachments](#)

☐ Additional attachments sent via separate cover

Select your payment type from the **Payment is for** menu.

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

Business unit: \* UNIVERSITY OF DELAWARE (UOD01) ▼  
Department: \* PROCUREMENT SERVICES (04750) ▼  
Payment is for: \* Awards ▼  
Amount per payee: \* \$1500.00  
Purpose for payment: \*  
Short description:  
2021 Procurement Education Award  
Long description:  
Award payment for 2021 Procurement Education Award presented to University of Delaware student, Kristen Pickering. Kristen will be formally recognized on July 6th.  
Special instructions:  
Attachment(s): Use the Browse button to locate the file(s) on your local drive (total size of attachment(s) may not exceed 30 MB).  
Choose File No file chosen  
Choose File No file chosen  
[more attachments](#)  
☐ Additional attachments sent via separate cover

- Complete the required information on the form
- Upload any attachments required for supporting documentation
- Click **Next Step**

Save & exit (not submitted) Exit without saving Next step

Is payee a US Citizen? \* ☒ Yes, ☐ No

If No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.

[\(lookup\)](#) [\(clear\)](#)

Or, enter the payee information below.

UD ID:  [\(lookup\)](#)

- OR -

First Name:

Middle Name:

Last Name: \*

Suffix:

Taxpayer ID:  (use format nnn-nn-nnnn)

Address line 1: \*

Address line 2:

Address line 3:

City: \*

State: \*

Zip Code: \*

Country: \*

E-mail:

Phone:  (use format nnn-nnn-nnnn)

Fax:  (use format nnn-nnn-nnnn)

- Click **Lookup** in the Payee Short Name section of the page

[Previous step](#)


[Save & exit  
\(not submitted\)](#)

[Exit without saving](#)

[Next step](#)



Enter all or part of the Vendor/Payee name:  
(Use last name for individuals)

Next step 

- Search for your payee
- Click **Next Step**

#### Active vendors

You MUST select a vendor from this box if available. If the vendor is not on the Active vendor list, please proceed to the Inactive vendor box below.



PICKKRIS-002: PICKERING, KRISTEN ASTRID 201 ALTAIR WAY BEAR, DE  
 PICKNORA-001  
 PICKSUSA-001

- Select the payee from the active vendors list
- Click **Submit**

#### Inactive vendors

Only select a vendor from the inactive vendors list if they are NOT available in the Active vendors list above. If the vendor is in neither list, select *Vendor Not Listed* from the Inactive vendor list.

\*\*Vendor Not Listed  
 PICKDAVI-001:  
 PICKJANE-001:  
 PICKJOSE-001:  
 WILMERCU-00'  
 WILMERCU-00'

Submit

Is payee a US Citizen? \*

☒ Yes, ☐ NoIf No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name:

Use the lookup to obtain a payee short name and click 'Add line' after each payee.

PICKERING,KRISTEN ASTRID (PICKKRIS-002) [lookup](#) [clear](#)

Or, enter the payee information below.

UD ID:

 [lookup](#)

- OR -

First Name:

Middle Name:

Last Name: \*

Suffix:

Taxpayer ID:

 (use format nnn-nn-nnnn)

Address line 1: \*

Address line 2:

Address line 3:

City: \*

State: \*

Zip Code: \*

Country: \*

E-mail:

Phone:

 (use format nnn-nnn-nnnn)

Fax:

 (use format nnn-nnn-nnnn)

- Click **Add Line**

[Previous step](#)[Save & exit  
\(not submitted\)](#)[Exit without saving](#)[Next step](#)

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

Payee	Citizen	UD W-9	Amount	Action
U0001 PICKERS-002 PICKERING, KRISTEN ASTRID	Y	n/a	\$1,000.00	<a href="#">Delete</a>
TOTAL			\$0.00	

### Add a payee

Is payee a US Citizen? ☐ Yes, ☐ No  
If No, does payee have a UD W-9? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
(lookup) (clear)

Or, enter the payee information below.

UD ID:  (lookup)

- OR -

First Name:

Middle Name:

Last Name: \*

Suffix:  Choose one ▼

Taxpayer ID:  (use format xxx-xx-xxxx)

Address line 1: \*

Address line 2:

Address line 3:

City: \*

State: \*  Choose one ▼

Zip Code:

Country: \*  USA (USA) ▼

E-mail:

Phone:  (use format xxx-xxx-xxxx)

Fax:  (use format xxx-xxx-xxxx)

[Add line](#)

• Click Next Step

[Previous step](#)

[Save & exit](#)

[Exit without saving](#)

[Next step](#)



## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required information, ! Error

Payee	Citizen	UD W-9	Amount	Action
U0001 PICKERS-002 PICKERING, KRISTEN ASTRID	Y	n/a	\$1,000.00	<a href="#">Delete</a>
TOTAL			\$0.00	

### Add a payee

Is payee a US Citizen? ☐ Yes, ☐ No  
If No, does payee have a UD W-9? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
(lookup) (clear)

Or, enter the payee information below.

UD ID:  (lookup)

- OR -

First Name:

Middle Name:

Last Name:

Suffix:  Choose one

Taxpayer ID:  (use format xxx-xx-xxxx)

Address line 1:

Address line 2:

Address line 3:

City:

State:  Choose one

Zip Code:

Country:  USA (USA)

E-mail:

Phone:  (use format xxx-xxx-xxxx)

Fax:  (use format xxx-xxx-xxxx)

[Add line](#)

- Repeat the **Lookup** and **Add Line** steps as needed to add additional Payees (not recommended)
- Click **Next Step**

[Previous step](#)

[Done & exit](#)

[Exit without saving](#)

**Next step**

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

- Complete your funding information
- Click **Next Step**

Symbol Key: \* Required Information, ! Error

Amount per payee: \$1,500.00

Funding per payee: You may enter up to 6 SpeedCharts.

Item Category/Account	SpeedChart	User Field	Amount
AWARDS & PRIZES - 149200 (lookup) (clear)	PURC110000 (lookup)	(lookup)	1500.00
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
(lookup)	(lookup)	(lookup)	
TOTAL			\$1500.00

◀ Previous step

📁 Save & exit  
(not submitted)

✕ Exit without saving

Next step ▶

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

- Review your funding details
- Click **Next Step**

Symbol Key: \* Required Information, ! Error

Funding detail:

Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
AWARDS & PRIZES	<a href="#">PURC110000</a>	<a href="#">149200</a>		<input type="text"/> (lookup)	<input type="text"/> (lookup)	\$1,500.00
Total						\$1,500.00

Additional comments:

◀ Previous step

📁 Save & exit  
(not submitted)

✕ Exit without saving

Next step ▶

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

- Review your request
- Click **Next Step**

Symbol Key: \* Required Information, ! Error

<b>Business unit:</b>	UNIVERSITY OF DELAWARE (UOD01)						
<b>Department:</b>	PROCUREMENT SERVICES (04750)					<b>Prepared by:</b>	Martin, Margot Elizabeth McCabe
<b>Payment is for:</b>	Awards					<b>Invoice number:</b>	
<b>Purpose:</b>	2021 Procurement Education Award Award payment for 2021 Procurement Education Award presented to University of Delaware student, Kristen Pickering. Kristen will be formally recognized on July 8th.					<b>Special instructions:</b>	
						<b>Attachments:</b>	

Payee(s)								
Name and address	US Citizen	UD W-8	Amount		Name and address	US Citizen	UD W-8	Amount
UOD01 PICKKRIS-002 PICKERING KRISTEN ASTRID	Y	n/a	\$1,500.00					

Funding						
Category	SpeedChart	Account	User field	Project ID/Grant	Source	Amount
AWARDS & PRIZES	<a href="#">PURC110000</a>	<a href="#">149200</a>				\$1,500.00
<b>Total per payee</b>						<b>\$ 1,500.00</b>
<b>Total funding</b>						<b>\$ 1,500.00</b>

**Additional comments:**

◀ Previous step

💾 Save & exit  
(not submitted)

✖ Exit without saving

Next step ▶

## Request for Payment to Individual

If you have questions, contact Procurement Services at (302) 831-2161.

Symbol Key: \* Required Information, ! Error

### Routing and Authorization

Role	E-mail Address	Completed On
Form Originator	<--> <a href="#">Martin, Margot Elizabeth McCabe</a>	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Approver ▾	<input type="text"/> (lookup)	
Account Code Administrator	<a href="#">Walueff, George S</a> ▾	
Final Approver	<a href="#">PayIndv RPI 2</a>	
Copy	<a href="#">Martin, Margot Elizabeth McCabe</a>	

- Select your Account Code Administrator and any additional approvers as needed (see also slide 26).
- Click Submit Form

Previous step

Save & exit  
(not submitted)

Exit without saving

Submit form

# What to do when you receive the **\*\*No Matching Results\*\*** message

**\*\* No matching results \*\***

Enter all or part of the Vendor/Payee name:  
(Use last name for individuals)

CARUANA

Next step 

- You may search for a payee and receive the message **\*\*No Matching Results\*\***
- Click **Close window** to return to the form.

Is payee a US Citizen? \* ☒ Yes, ☐ No  
 If No, does payee have a UD W-8? ☐ Yes, ☐ No

Payee short name: Use the lookup to obtain a payee short name and click 'Add line' after each payee.  
[/lookup](#) [/clear](#)

Or, enter the payee information below.

UD ID:  [\(lookup\)](#)  
 - OR -

First Name:   
 Middle Name:   
 Last Name: \*   
 Suffix:   
 Taxpayer ID:  (use format nnn-nn-nnnn)  
 Address line 1: \*   
 Address line 2:   
 Address line 3:   
 City: \*   
 State: \*   
 Zip Code: \*   
 Country: \*   
 E-mail:   
 Phone:  (use format nnn-nnn-nnnn)  
 Fax:  (use format nnn-nnn-nnnn)

- You will be returned to the **Add a payee** page
- Although the form will allow you to do so, **please do not type in payee information for any payment type other than Human Subject Payments, Refunds or Reimbursements.** Accounts Payable **cannot** process payment without the Payee Short Name.
- You will need to email [procurement@udel.edu](mailto:procurement@udel.edu) to inquire about the W9/W8 & SDC Form submitted by/for the payee you are trying to find.
- You must wait until the W9/W8 & SDC Form is entered and approved by procurement to select your payee.
- **PTI Webforms submitted without Payee Short Names will be returned to you.**

[Previous step](#)

[Save & exit  
\(not submitted\)](#)

[Exit without saving](#)

[Next step](#)



## Frequently Asked Questions

**Q: I submitted a PTI Webform to pay a student and it has been approved, but they have not received the payment.**

A: If the student is missing a payment from an approved Webform, please ask them if they recently requested a student refund. Procurement and Student Financial Services share the same vendor record system. If a student recently received a refund from SFS, it is likely that their Webform payment went to the bank account (ACH) or address (check) that they provided to SFS.

**Q: Can I use the PTI Webform to pay employees?**

A: Please refer to the [Non-PO Payment Matrix](#) for a listing of allowable PTI payments to employees.

**Q: Are there any special considerations when using the PTI Webform to pay Participant Support on a Federal Grant?**

A: You will need to add your C&G Analyst as an approver when submitting the PTI Webform. Because Procurement does not have visibility to award budgets, if the PTI Webform is received by Procurement without C&G approval, Procurement will have to re-route the form, adding additional processing time.

**Q: Will my payee receive a 1099 form?**

A: The account code used for the payment determines whether a payment type is taxable. If the payee receives \$600 or more in taxable payments in a calendar year, they will receive a 1099 form from UD, and their income will be reported to the IRS. 1099 forms are issued at the end of January. The [Controller's Office](#) maintains an Account Guide – UDX & Concur in the Resources section of their webpage. The guide indicates which account codes are 1099 eligible.

- Account codes must not be changed to avoid taxability
- Procurement does not and cannot withhold taxes from payments to US citizens; we do withhold and report to Payroll for foreign individuals

### Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

### Resources:

- [Procurement Services Website](#)
- [NPOP Matrix](#)
- [NPOP Account Codes with Descriptions](#)
- [Finding Suppliers & Supplier Information](#)
- [UD Online W9](#)
- [Foreign Supplier Documents Review Guide](#)
- [IRS W8 Form Search](#)
- [Supplier Data Collection \(SDC\) Form](#)