TIPS AND TRICKS: PROCUREMENT AND PAYMENT SERVICES

Greetings.

The WyoCloud Team and Oracle have resolved the connection issue that some users were experiencing this morning with WyoCloud Financial Management. If you continue to have connection issues, please submit a help desk ticket or email us at wyocloud@uwyo.edu.

Additionally, based on your feedback, the WyoCloud team is sharing some tips and tricks related to Procurement and Payment Services.

Forms & Documentation
Looking for a hosting form? The per diem calculator? All necessary forms and documentation needed as attachments in WyoCloud Financial Management can be found in the Procurement Services WyoGroup, which will shortly be changing its name to Procurement and Payment Services in WyoGroups. Information on joining a WyoGroup can be found here.

Hosting & Business Events
When submitting an expense report or PO invoice relating to the purchase of food for an event, a hosting/business event form must be completed and attached with an itemized receipt as supporting documentation. This form can be found in the Procurement Services WyoGroup. The "Purpose of the Event" section should be informative and describe in full the business purpose of the event. Writing names on the itemized receipt will not be accepted.

Description Fields
To alleviate possible rejection, when you are filling out a description field on an expense report and/or a non-PO invoice, please be clear and informative when writing your descriptions so that anyone who may review the report/invoice understands the purchase. Please also remember that description information can be pulled into reports that are shared with administrators and others; hence, clear, well-written sentences are appreciated.

Receipts and Invoices
While the WyoCloud system will indicate receipts are not required for purchases under $15, all p-card transactions, regardless of amount, must include an itemized receipt. If an itemized receipt for a p-card transaction is not available, a substitute receipt/dispute form must be completed in detail. This form can be found in the Procurement Services WyoGroup under Procurement Card Information & Forms.

For non-p-card expenses where an itemized receipt is missing, a substitute receipt form (non-p-card) must be completed in detail. This form can be found in the [Procurement Services WyoGroup](#) under Payment Services, General Forms.

Claiming Per Diem while Attending a Conference
If you are claiming per diem while attending a conference, the conference agenda must be attached to the expense line or requisition. Per the [UW Travel Policy](#), if meals are offered by the conference and the charge of these meals are covered by the registration fee, you are not able to submit for per diem costs for meals that are provided by the conference. For example, if a conference provides a lunch that is included as part of the registration fee but the conference does not provide breakfast or dinner, you may submit per diem charges for dinner and breakfast only.

Individual Memberships
Individual memberships, including professional licenses, continuing education, etc., must be approved by the department head. The following statement should be included with the receipt, and signed by the department head.

This membership is required for <employee name> to perform <his/her> job duties.
_____
Signature

Travel Expenses
Reimbursable travel expenses must be submitted within 60 days of the end of the trip. A full list of reimbursable travel expenses can be found in the [UW Travel Policy](#).

PO Invoices
The following guidelines should be followed when forwarding PO invoices to Payment Services:
1. Legibly write or type the PO number on each invoice.
2. Email invoices to accounts-payble@uwyo.edu – ONE INVOICE PER ATTACHMENT.
3. Multiple attachments per email are fine, but please limit to 10 or less per email.
4. Please let us know in this email submission if payment needs to be processed quickly.
5. If you need to pick up a check, a special handling form should be scanned as the first page of the invoice attachment.

IMPORTANT: After receiving the good or service, be sure to complete the process by creating a receipt for the purchase order. ***A receipt and invoice must match in order for payment to be made***. Please reference the [Receive Goods & Services Quick Reference Guide (QRG)](#) under Procurement in WyoCloud.

If you need assistance, please contact the UW Help Desk and submit a ticket. The UW Help Desk is your first resource and quickest response for questions. You can contact the Help Desk by emailing userhelp@uwyo.edu or by calling 766-4357 and selecting option #1.
Best,

The WyoCloud Team

Contact Information

The WyoCloud Team
Email:wyocloud@uwyo.edu
www.uwyo.edu/wyocloud

Need help with WyoCloud?
Contact the UW Help Desk
766-4357, Option #1
userhelp@uwyo.edu