

WIP Tips to Remember

To avoid duplicate payments of an invoice, complete the following when processing invoices in WIP:

- Enter the invoice number and date, **exactly** as noted on the transaction. (If the invoice is unnumbered, use the invoice date in the following format DD-MMM-YYYY e.g., 15-JAN-2008.)
- Verify **correct vendor name & pay site**.
- Invoices are “**originals**” not faxes.
- **Note the WIP record number on the invoice.**

To ensure that the purchases for goods/services over the bidding threshold are completed accurately:

- Make sure the required documentation is included and kept with the invoice:
For transactions >\$2000 and ≤\$5000, keep in mind that quotations from at least three (3) vendors or a Single /Sole Source form are still required:

As a refresher, follow these steps for obtaining quotations:

- Document the bids. Include the names of the vendors, quoted prices and the contact person who gave you the quote.
- Attach the bid documentation to your WIP invoice.
- Retain your copy of the bid document as part of the transaction record.

NOTE: Purchases from vendors qualifying as single or sole source suppliers must be explained on an Explanation of Single/Sole Source Vendor Form which must also be attached to the transaction. This form becomes part of the transaction record. <http://www.yale.edu/ppdev/forms/purchase/singlesole.xls>

To ensure that all applicable tax rules and regulations are followed:

- Verify that the payment is **not** goods/or services **from a foreign vendor**.
- If it is, then invoices must be sent to Accounts Payable for processing.

References:

[Procedure 3401 PR.04 Submitting Invoices for Payment](#)

[Guide 3401 GD.03 When to Use WIP](#)

[Guide 3401 GD.02 WIP Approver Checklist](#)