

## The Paperwork



Just like any new employer, Cooperative Extension has a number of forms/processes for you to complete within the first days, weeks and months of employment. These actions are grouped into three categories and described below. You'll notice that there is more than one office to which the forms are returned. Please make a careful note of the office location so your forms can be processed in a timely way. Use the check list (page 4) to make sure nothing is overlooked.

### A. Items needing attention within 3 days of your start date:

- *I-9 Form*: <http://www.uscis.gov/files/form/i-9.pdf> (This proof of citizenship form must be jointly completed by yourself and your Supervisor/Department Head/District Director; you will be asked to provide two forms of identification so that copies can be made.)
- *W-4 Form*: <http://www.uwex.edu/payroll/forms/w4.pdf> (Complete this income tax withholding form and return to your Supervisor/Department Head/District Director.)

### B. Items needing attention within 30 days of your start date:

- *Orientation to Unclassified Staff Benefits*  
Contact Jeanne Stuckert in the UW-Extension Payroll and Staff Benefits Office at **608.262.4857** to arrange a time to review benefits and initiate insurance coverage. The office is located at 105 Extension, 432 N Lake Street, Madison, WI 53706. This review may also be completed over the phone. **NOTE:** You may wish to do this prior to your start date as there are strict deadlines for enrollment – some within 30 days of employment. A benefits summary can be found at <http://www.uwsa.edu/hr/benefits>.
- *Direct Deposit Authorization Form*  
Complete this form to have your paycheck directly deposited to your bank account. It can be found at <http://www.uwex.edu/payroll/forms/direct-deposit/auth-form.pdf>. Return the form to the UW-Extension Payroll and Staff Benefits Office, 105 Extension Building, 432 N Lake Street, Madison, WI 53706. If you do not have a bank account, contact the Payroll office to make alternate deposit arrangements (**608.262.0531**).
- *E-Mail*  
Contact your District office to establish a username and password to access email and other systems. If your position is not associated with a District, contact your program or unit office for assistance in establishing an email account.

- Travel policies and Forms  
Review several policies and complete corresponding forms related to travel.  
<http://www.uwex.edu/business-services/travel/>
  - Travel Reference Guide  
Review this document to learn about the allowable travel expenses reimbursed under UW-System policies.  
<http://www.uwsa.edu/fadmin/document/travref6.pdf>
  - Travel Expense Report  
Form and instructions for completion for reimbursement of allowable travel expenses under UW-System policies  
<http://www.uwsa.edu/fadmin/document/sfster5-06.xls>  
<http://www.uwsa.edu/fadmin/fppp/fppp3624.htm>
  - Vehicle Use and Driver's Information  
Review policies and complete Vehicle Use Agreement  
[http://www.uwex.edu/facilities/docs/UWEX\\_FAC\\_STAFF%20VEHICLE%20USE%20AGREEMENT\\_1105.pdf](http://www.uwex.edu/facilities/docs/UWEX_FAC_STAFF%20VEHICLE%20USE%20AGREEMENT_1105.pdf)
  - Use of Personal Vehicles for University Business  
University employees can be reimbursed for driving their personal vehicles on official University business. (This reimbursement is intended to cover all costs of operating the vehicle, including insurance coverage.) All personal vehicles used by employees for University business must be insured with an individual liability policy. State liability coverage is available only on an excess basis. However, this excess protection of the State liability coverage is not available unless the driver has completed the Vehicle Use Agreement (see above bullet).
  - Travel Card Policy and Forms  
State of Wisconsin Travel Card Policy and related forms. Please review the Travel Card Policy and Cardholder Agreement and then complete a Travel Card User Application and Travel Card User Agreement and forward them to your district director/hiring authority.  
[http://www.doa.state.wi.us/docs\\_view2.asp?docid=2503](http://www.doa.state.wi.us/docs_view2.asp?docid=2503)  
<http://www.uwex.edu/business-services/forms/travel/cardholder.pdf>  
<http://www.uwex.edu/business-services/forms/travel/tcardapp.doc>  
<http://www.uwex.edu/business-services/forms/travel/tcardagree.pdf>
- Sales Tax Exempt Certificate  
Cooperative Extension is exempt from paying sales taxes as an educational institution of the University of Wisconsin System. Identification and tax exempt numbers are to be used when making purchases. It's a good idea to carry documentation of the tax exempt status for those times when you make business purchases (e.g. books, supplies, photocopies, etc.) and need to prove your tax exempt status as an employee of the University. For more information on Cooperative Extension's tax exempt status, or to obtain a sales tax exempt certificate, you may visit this web site:  
<http://www.uwex.edu/ces/4h/resources/mgt/documents/StateTaxFacts.pdf> .

- *Business Card Order Form*  
If you wish to order business cards through the Division of Information Technology (DoIT) at UW-Madison printing office, complete the online form at <http://www.doit.wisc.edu/printing/uwexcard.asp>. Some offices have made arrangements for business cards to be printed locally. Since procedures vary from office to office, please contact your department head for specific ordering, billing and payment information.
- *Person File Information Form*  
This form is used to communicate address/phone number changes to the Payroll and Staff Benefits Office. It's important to communicate these changes in a timely way so your payroll information is accurate at all times. Please complete the form ASAP after learning your new office and/or home address/phone numbers. List your office e-mail address if you know it at this point. If not, submit another form after you receive it. The form can be downloaded at <https://www.uwex.edu/forms/payroll/pif/>. If you have questions about the form, please contact the Payroll and Staff Benefits Office (608.262.0531).
- *Name Badge Request Form*  
To receive a laser-printed name badge, complete the Name Badge Request Form found at <http://www.uwex.edu/ces/nco/documents/BADGFORM.pdf> and return to Cooperative Extension Human Resources (608.263.1945), 249 Extension Building, 432 N Lake St, Madison, WI 53706. Name badges are usually ordered on a monthly basis (to maximize volume discounts). Your patience is appreciated.

**C. Items needing attention within first 30-60 days of your start date:**

- *Identification Card*  
For UW-Madison campus/Dane County appointments ONLY: The Photo ID Office is located in Union South, Room B109, 227 N. Randall Ave., Madison. Office hours are generally Monday-Friday from 8:00 – 4:15. It's a good idea to call first (608.262.3258), to check office hours and to make sure you're entered into the payroll system before making the trip. You must bring some form of photo identification with you for verification. This Photo ID card ensures access to some UW-Madison facilities and services, as well as some merchandise discounts.
- *Employee Policies*  
UW-Extension and Cooperative Extension have a number of policies and procedures that govern their operations. Please familiarize yourself with these materials so you know how they apply to you. You may want to "bookmark" them electronically so that you can easily refer to them in the future.  
<http://www.uwex.edu/ces/admin/policies/> (operational policies)  
<http://www.uwex.edu/secretary/policies.cfm>

## The Paperwork Check List

- I-9 and W-4 forms returned to your supervisor
- Speak with Jeanne Stuckert in Payroll and Staff Benefits Office to review and initiate benefits
- Return payroll Direct Deposit Authorization Form to Payroll and Staff Benefits Office
- Contact your District Office to establish a username/password for email (or your program or unit office if you're not associated with a District)
- Download Sales Tax Exempt Certificate
- If you will use your car or a state-owned vehicle for business purposes, complete the Vehicle Use Agreement form and return to UW-Madison Risk Management with a copy to UWEX Risk Management. Also complete a "User Card Agreement" and "Cardholder Agreement", and forward them to your district director/hiring authority.
- (Optional) Complete online Business Card Order Form and return to UW-Madison DoIT Printing Services (or a local provider of printing services)
- Complete Person File Information Form (with updated office and home address, telephone number, and email address)
- Complete Name Badge Request Form and return to Cooperative Extension Human Resources
- Make arrangements for your ID card (only for UW-Madison appointments or employees who live in Dane County)
- Familiarize yourself with UWEX and Cooperative Extension employee policies