Faculty FYI Guide: Useful information for ME Faculty

Purchasing:

1. The **UW is tax exempt**. All purchases should not include tax.
2. All purchases should be made in compliance with university guidelines. If you have questions please contact the ME Financial Specialist BEFORE you purchase.
3. All purchases must be shipped to a UW address.
4. **Purchases Under $5,000** can be made by faculty and staff within the department.
   a. **Shop@UW** is the university’s e-commerce site that allows faculty and employees to easily compare prices, purchase tax-free, and return items available from contracted vendors, including Grainger, Staples and VWR and many more. Purchases on the site require an account. Contact the ME Financial Specialist for details.
      i. Each vendor has a contact person for discounted quotes and to find items not available from the vendor through Shop@UW.
   b. **DoIT** is the university's technology vendor. There are several shops on campus and online webstore. Purchases on the site require an account. Contact the ME Financial Specialist for details.
      i. Josh Jankowski (joshua.jankowski@wisc.edu) is the department IT Specialist. Consult with him on your purchases and have him help you configure your computer. He can place orders for you or you can ask the department to place individual orders. He can also assist with data backup.
      ii. Engineering software may be available to download through Computer-Aided Engineering (CAE).
   c. **SWAP** is the university’s surplus property reseller. This is a good place to find used but good office furniture, computer equipment and items for your lab. Purchases on the site require an account. Contact the ME Financial Specialist for details.
   d. If items are not available from any of the above resources, purchases under $5,000 can be made with the ME department credit card. See the ME Department Procard Policy or contact the ME Financial Specialist for details.
   e. **Business cards** may be ordered through http://www.uwdoitprintingstore.org/. Log in using your NetID and password. Down on the left are COE business card templates, you can use. You can order there yourself with an account number, or sit down with the ME Financial Specialist to order.
   f. Transportation
      i. **Parking permits**: You need to be registered in order to apply for a parking permit. Contact the COE unit transportation coordinator found on the Transportation Services website. Once you are registered in the system, then go to the parking permit website and then apply for the permit.
      ii. **Bus passes** are also available on the Transportation Services website.
g. **Hosting meals for others** requires an itemized receipt and business purpose. There are additional forms required for paying for or reimbursing hosted meal expenses. See the [UW policy](#) and/or contact the ME Financial specialist BEFORE you host a meal.

5. **Purchases over $5,000** are made and authorized only by UW purchasing agents and require a purchase requisition. Contact the ME Financial Specialist to get started.

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**Travel:**

1. The university has [important regulations](#) that must be followed in order to purchase or be reimbursed for travel. It is the **traveler’s responsibility** to understand and comply with UW travel and reimbursement **policies and procedures**. If you have specific questions about policies or procedures contact the ME Financial Specialist. Important highlights are:
   a. Travelers must be an **authorized driver to claim mileage, rent a car, or drive a university fleet car**. Contact the ME Front Desk USPA to get authorized. See the [Risk Management website](#) for information.
   b. All UW employee and visitor **airfare** must be booked though Fox/Concur.
   c. All UW employee and visitor **lodging** must be booked through Fox/Concur or through the hotel or conference site directly. Third party sites like Expedia and Travelocity are not allowed.
   d. The University follows federal **meal and lodging per diems**. A [lodging and meal allowance calculator](#) is available for travelers to determine per diems by location. This may be used before travel to plan or after travel for reimbursement.
   e. **Travel and expense reimbursement** is submitted by employees through the UW E-reimbursement system.
   f. After reimbursements are completed online, all required receipts are turned in to room 3107F ME. Envelopes are provided. Travelers should complete the [ME E-Reimbursement form](#) and turn it in with receipts. If traveler is a student, the PI for the funding to be charged needs to sign the E-Reimbursement form.

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**HR and Payroll:**

1. **Hiring:**
   a. **Appointments cannot be backdated.** We are required to do criminal background checks and I-9 verification BEFORE anyone can be hired. If you are planning on hiring someone, contact the department first.
   b. All students must be enrolled in the UW before their start date.
      i. **International students with visa questions** should contact [International Student Services](#).
   c. **Appointment %, start and end dates can affect benefits.** Consult with the ME Payroll and Benefits Specialist in advance.
   d. For **RA, Student Hourly and $0 dollar appointments** contact the ME Payroll and Benefits Specialist.
      i. $0 visiting appointments
1. Sponsor is responsible for identifying office space, if needed.

2. International visitors have specific documentation and financial information requirements and must also satisfy UW English proficiency requirements.

e. For TA, Academic or University Staff appointments, contact the Department Administrator.

f. Common HR forms and resources:
   i. UW Insurance Information
   ii. W-4 Form
   iii. Direct Deposit Form
   iv. SHIP Insurance: Required for all international students unless they have a waiver.
   v. GLACIER helps determine tax residency, withholding rates, and income tax treaty eligibility for non-resident aliens.
   vi. International Faculty and Staff Services for visa questions.
   vii. International Student Services for visa questions.

Facilities:

1. Conference rooms are reserved through the EMS System. Classrooms are controlled by Curricular Services and can be scheduled after classroom assignments are made each semester. Please make requests 48 hours in advance to ME Student Service Center in 2107 ME.

2. Keys and building card access requests are made using the online Key Request form. After you receive an email confirmation, keys can be picked up in 3107 ME. Building card access is updated every Monday.

3. Phone lines are paid for and managed through DoIT. If you need a line changed or set up, contact theme Financial Specialist. PIs are responsible for purchasing their own phones.

4. Safety protocols, services and training are available through UW Environment, Health & Safety. All PIs are responsible for updating lab safety signs outside of their labs each year.

5. There are multiple IT Resources available. Contact Josh Jankowski, the department IT Specialist for assistance.
   a. Computer Aided Engineering (CAE) takes care of all the instructor podium computers in the classrooms. A CAE login is required to access these machines, this is NOT the same as your DoIT NetID. Create a CAE login on My CAE Account website. If you experience problems with CAE computers, contact the CAE help desk at (608) 262-5349 or helpdesk@cae.wisc.edu. All classrooms will have a laptop connection that will allow a laptop to be projected.
   b. AV in classrooms and conference rooms is managed through Engineering Media Services. This includes videotaping, videoconferencing and equipment rentals.
   c. CAE offers resources for downloading engineering software, website hosting, remote desktop services. See the Getting Started website for details.
   d. Your faculty profile is updated by navigating to your profile on the ME website and clicking the “Update Profile” link in the lower right corner of the page.

6. Printers and teaching supplies:
a. The **department printer** is in room 3057 ME. This room is open during business hours. If you want to access the room outside of business hours, make a key request (item 2, above). Contact the ME Front Desk USPA for a copy code to use the printer. Contact Josh Jankowski ([joshua.jankowski@wisc.edu](mailto:joshua.jankowski@wisc.edu)) the department IT Specialist, to configure and install drivers on your computer.

b. **Paper, pens and basic office supplies** are in 3057 ME. If you need to order office supplies, look at Staples on Shop@UW and send a list of the items you want and funding information to [purchasing@me.engr.wisc.edu](mailto:purchasing@me.engr.wisc.edu).

7. **Maintenance and service call** requests should be sent to the Academic Department Manager.

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**Budget and Finance:**

1. **Funding accounts, spending and balances** are available on the UW Financial site called [Wisdm](https://www.wisdom.wisc.edu).
   a. Log into Wisdm with your NetID.
      i. Search by Department (ME is 196200) and PI to see all accounts under a PI’s name.
      ii. First three numbers of an account indicate where the funding comes from; 144 (Federal research), 133 other research, 135 (Graduate School), 233 (discretionary/donation) and 101 (General Operations/State)
      iii. UW fiscal year runs from July 1 to June 31.
      iv. If you have any questions about your funding contact the ME Accountant.

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**Research:**

1. All **proposals, contracts and agreements** need to be routed through appropriate university channels to ensure compliance with Federal, State and UW regulations. The internal system to route proposals, contracts and agreements within the UW is called [WISPER](https://wisper.engr.wisc.edu). UW Research and Sponsored Programs (RSP) has final signature authority on all extramural support. Contact the ME Research and Grants Administrator for details.
   a. Other grant submission tools and resources are:
      i. **CAYUSE**: Web-based system used for electronic grants.gov submissions to federal agencies that provide adobe forms for the submission process (e.g. NIH, DOD, CDC, USDA, etc.)
      ii. **Fastlane**: Web-based system used for electronic NSF submissions.
      iii. **Vice Chancellor for Research**

2. Other useful resources are:
   a. Vice Chancellor for Research and Graduate Education Research Policy and Compliance
   b. Conflict of Interest and Outside Activities Reporting
   c. Effort Certification
   d. Research Ethics
   e. Human Subjects Training
   f. Animal Subjects Training
   g. Equipment Loan Request
h. Gift-in-kind guidelines

**Instructional Resources:**

1) **Undergraduate Student Service:** The Undergraduate Student Services Center provides advising and other services for ME undergraduate students. It is located at 1410 Engineering Drive. Academic advisors can help students, faculty and staff with questions about accessing courses, navigating degree requirements, resolving academic issues, warrants and more.

2) **Graduate Student Advising:** The Graduate Student Services Center supplements faculty advisors and Engineering Career Services. It is located in the Mechanical Engineering building, room 3182.

1) **Course Evaluations** are done online using a web-based tool called AEFIS. Survey announcements are sent to faculty and staff via email for mid-term (for select courses) and final course and instructor evaluations. All courses use a common survey for end-of-semester evaluations. If you have questions, contact the Department Administrator. For instructions on how to access AEFIS, see Learn@UW KB.

2) **Moodle** is a web-based learning platform for course collaboration, feedback and grading. Faculty and TAs should have access to the system. For Moodle support contact Wendt Commons.

3) **Admissions** questions should be directed to student services.
   a) Applications for undergraduate admissions is managed by the UW Office of Admissions and Recruitment.
   b) Applications for graduate admissions is managed by the UW Graduate School.

4) **Undergraduate Scholarships**

5) **Graduate Fellowships**

6) **Student Organizations**

7) **Career Services**

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**ME Administrative Office Staff:**

**Department Address:**
1513 University Ave. Rm. 3107
Madison, WI 53706
Email: medept@cae.wisc.edu
Phone: 608.262.3543
Fax: 608.890.3966

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<th>Financial Specialist:</th>
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<td>Catherine Carter</td>
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**Undergraduate Student Services Hub:**
1410 Engineering Drive Rm 170
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