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W<u>University of Wisconsin-Madison</u>

Business Services

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Business Services 'How To' Documents

'How To' pages give brief instructions for performing the most commonly used business functions at UW-Madison along with links to more detailed policy and procedure pages. **Can't find what you need? Please suggest ''How To'' topics by <u>emailing the webmaster.</u>**

Use the search above or the Alphabetical List below to find relevant 'How To' Documents:

Recently Added/Updated 'How To' Pages:

- How To Notify Cash Management of Armored Car Service Changes (added 10/16/09)
- <u>How to Complete Cost Transfer Request (Non-Salary) Non-Grant-- any fund except 133 and 144</u> (added 10/14/09)
- How to Obtain a Department Copy of a Purchase Order (added 10/6/09)
- How to Request a Merchant ID for Face-to-Face/Counter Swipe/Telephone Sales Operations and Webbased/Internet Operations (updated 9/3/09)

$\underline{A} | \underline{B} | \underline{C} | \underline{D} | \underline{E} | \underline{F} | \underline{G} | \underline{H} | \underline{I} | \underline{J} | \underline{K} | \underline{L} | \underline{M} | \underline{N} | \underline{O} | \underline{P} | \underline{Q} | \underline{R} | \underline{S} | \underline{T} | \underline{U} | \underline{V} | \underline{W} | \underline{X} | \underline{Y} | \underline{Z} |$

A

- ACH: How to Notify Cash Management of Incoming Department Wire/ACH
- Addresses: <u>How to Change Your Personal Information for Payroll Purposes</u>
- Agent's: How to Find a Purchasing Services Agent
- Alarm Systems: How to get an Alarm System Installed
- Armored Car: <u>How To Notify Cash Management of Armored Car Service Changes</u>
- Authorized: How to Get Authorized for WISDM
- Automobile Accident: How to Report an Automobile Accident

- Blanket Order: <u>How to Set Up an External Contract Blanket Order</u>
- Blanket Order: How to Set Up a Specific Blanket Order
- Buy: <u>How to Determine if you May Purchase an Item on Your Own or if You Need Purchasing Services</u>
 <u>Involvement?</u>

С

- Cancellation Orders: <u>How to Complete a Cancellation Order</u>
- Cash Pick-Up: How To Notify Cash Management of Armored Car Service Changes
- Catering: <u>How to Obtain Catering Services for an Event</u>
- Cell Phone: <u>How to Get a Cell Phone</u>
- Certificate: How to Check an Insurance Certificate
- Change Order: <u>How to Complete a Change Order</u>
- Check Handling: <u>How to Process Vendor Refunds</u>
- Checks: How to Trace or Stop Payment for Non-Payroll Checks
- CISI: How to Enroll in Study Abroad Insurance
- Complaints: How to Handle a Vendor Non-Performance Complaint
- Contract Blanket Order: <u>How to Set Up an External Contract Blanket Order</u>
- Contracts: How to Use an Existing Purchasing Contract
- Contracts: <u>How to Get a Document Signed by a University Official</u>
- Continuing Order Requisition (COR): How to Correctly Handle a COR for External Blanket Orders
- Copier: How to Purchase a Photocopier
- Copying: How to Purchase a Printing or Copying Job
- Cost Transfer: <u>How to Complete Cost Transfer Request (Non-Salary) Non-Grant--any fund except 133</u> and 144
- Credit Card: <u>How to Request a Merchant ID for Face-to-Face/Counter Swipe/Telephone Sales</u> Operations and Web-based/Internet Operations
- Credit Reference: How to Get a Credit Reference for a Vendor
- Crime: <u>How to Report an Allegation of Misappropriation of University Assets</u>

D

- Delivery: <u>How to Obtain Shipping Services at UW-Madison</u>
- Demonstration Equipment: <u>How to Obtain Products or Equipment for Trial, Evaluation, Demonstration or Loan</u>
- Department Copy: <u>How To Obtain a Department Copy of a Purchase Order</u>
- Deposit: How to Deposit Cash/Gifts Received as Gifts to the University
- Deposit Pick-Up: <u>How To Notify Cash Management of Armored Car Service Changes</u>
- Direct Deposit: How to Have Your Paycheck Direct Deposited to a Financial Institution
- Direct Payments: How to Process Non-Requisition Payments
- Disposal: How to Sell, Dispose of, or Trade In an Item or Piece of Equipment

Business Services 'How To' Documents

- Document Sales: <u>How to Order from DOA Document Sales</u>
- Donations: <u>How to Deposit Cash/Gifts Received as Gifts to the University</u>
- Draft: <u>How to Make Foreign Payments by Wire or Draft</u>
- Drafts: How to Notify Cash Management of Outgoing Draft/Wire Payments
- Drivers: <u>How to Become Authorized to Drive University or State-Owned Vehicles</u>

E

- Earnings Statements; How to Obtain My Earnings Statements
- Eligible Vendors: <u>How to Determine if a Vendor is Ineligible</u>
- E-Mail: <u>How to Change Your Personal Information for Payroll Purposes</u>
- Emergency: <u>How to Get an Emergency Transaction (ET) Processed</u>
- E-Pay: <u>How to Request a Merchant ID for Face-to-Face/Counter Swipe/Telephone Sales Operations</u> and Web-based/Internet Operations
- Equipment Evaluation: <u>How to Obtain Products or Equipment for Trial, Evaluation, Demonstration or</u>
 <u>Loan</u>
- Event: How to Obtain Catering Services for an Event
- Exemption: How to Find Information on the University's Tax Exempt Status
- Expenditures: <u>How to Make Expenditures from UW Foundation Accounts</u>
- External: <u>How to Prepare an External Requisition</u>

F

- Facsimile (Fax) Machine: <u>How to Purchase a Facsimile (Fax) Machine</u>
- Financing: How to Secure Lease or Purchase Financing
- Fire: How to Report a Property Claim
- Food: How to Obtain Catering Services for an Event
- Foreign Currency Payments: How to Make Foreign Payments by Wire or Draft
- Foundation: How to Deposit Cash/Checks Received a Gifts to the University
- Foundation: How to Make Expenditures from UW Foundation Accounts
- Foundation: <u>How to Transfer Funds from UW Foundation to University Fund 233 Projects</u>
- Fraud: How to Report an Allegation of Misappropriation of University Assets

G

Gifts: How to Deposit Cash/Checks Received as Gifts to the University

H

• Human: <u>How to Pay Human Subjects</u>

I

• Ineligibility: <u>How to Determine if a Vendor is Ineligible</u>

Business Services 'How To' Documents

- Insurance: How to Report a Property Claim
- Insurance: How to Report an Automobile Accident
- Insurance: <u>How to Check an Insurance Certificate</u>
- Insurance: <u>How to Enroll in Study Abroad Insurance</u>

J K L

- Lease: <u>How to Rent or Lease a Vehicle</u>
- Lease: How to Secure Lease or Purchase Financing
- Liability: How to Prepare a Basic Release of Liability
- Loaner Equipment: <u>How to Obtain Products or Equipment for Trial, Evaluation, Demonstration or Loan</u>

Μ

- Mailing: <u>How to Obtain Shipping Services at UW-Madison</u>
- Merchant ID: <u>How to Request a Merchant ID for Face-to-Face/Counter Swipe/Telephone Sales</u> <u>Operations and Web-based/Internet Operations</u>
- Minority Business Enterprise: How to Find a Minority Vendor
- Misappropriation: <u>How to Report an Allegation of Misappropriation of University Assets</u>
- MD Number: <u>How to Purchase from The University Book Store</u>
- MDS: <u>How to Order From Materials Distribution Services (MDS)</u>

N

- Non-Requisition Payments: <u>How to Process Non-Requisition Payments</u>
- Non-Resident Alien: <u>How To Determine Which Tax Related Documents are Required When Making</u>
 <u>Non-Payroll Payments at UW-Madison</u>
- Non-Resident Alien: <u>How to Obtain/Apply for a Taxpayer Identification Number for Non-Resident Aliens</u>
- Non-Salary Cost Transfer: <u>How to Complete Cost Transfer Request (Non-Salary) Non-Grant--any fund</u> <u>except 133 and 144</u>

0

- Online Account Information: <u>How to Access Travel Card Account Information Online</u>
- Order: <u>How to Order From Materials Distribution Services (MDS)</u>
- Order: How to Complete a Cancellation Order

Business Services 'How To' Documents

- Order: How to Complete a Change Order
- Order: <u>How to Set Up an External Contract Blanket Order</u>
- Order: How to Set Up a Specific Blanket Order

P

- Payment: How to Pay Human Subjects
- Payment: How to Make Foreign Payments by Wire or Draft
- Payment: <u>How To Determine Which Tax Related Documents are Required When Making Non-Payroll</u>
 <u>Payments at UW-Madison</u>
- Payment: How to Obtain/Apply for a Taxpayer Identification Number for Non-Resident Aliens
- Payroll Check: How to Have Your Paycheck Direct Deposited to a Financial Institution
- Payroll Check: How to Obtain My Earnings Statement
- Personal Information: How to Change Your Personal Information for Payroll Purposes
- Phone Number: <u>How to Change Your Personal Information for Payroll Purposes</u>
- Photocopier: <u>How to Purchase a Photocopier</u>
- Printing: <u>How to Purchase a Printing or Copying Job</u>
- Process: How to Prepare an External Requisition
- Property: <u>How to Report a Property Claim</u>
- Property Disposal: How to Sell, Dispose of, or Trade In an Item or Piece of Equipment
- Purchase Order: <u>How to Close Purchase Orders (POs)</u>
- Purchase Order: How To Obtain a Department Copy of a Purchase Order
- Purchases: How to Secure Lease or Purchase Financing
- Purchases: How to Purchase Goods and Services at the University of Wisconsin-Madison
- Purchasing: <u>How to Find a Minority Vendor</u>
- Purchasing: <u>How to Find a Purchasing Services Agent</u>
- Purchasing: <u>How to Determine if You May Purchase an Item on Your Own or If You Need Purchasing</u> <u>Services Involvement?</u>
- Purchasing Card: <u>How to Find Purchasing Card Transactions on WISDM</u>
- Purchasing Card: How to Handle Unrecognizable Purchasing Card Charges
- Purchasing Card: <u>How to follow up on Cardholder Noncompliance</u>
- Purchasing Card: <u>How to Obtain a Purchasing Travel Card</u>
- Purchasing Card: <u>How to Obtain a PVS Net Logon</u>

Q

R

- Reimbursement: <u>How to Obtain Reimbursement for Job Training/Career Education Expenses</u>
- Reimbursement: <u>How to Determine what to Enter in the Taxpayer ID# Field of a Direct Payment for</u> <u>Employee Reimbursement (ER)</u>
- Release of Liability: <u>How to Prepare a Basic Release of Liability</u>
- Rent: <u>How to Rent or Lease a Vehicle</u>
- Requisition: <u>How to Use the Requisition & Number Generator in My UW</u>
- Requisition: <u>How to Get an Emergency Transaction (ET) Processed</u>
- Requisition: <u>How to Track the Path of an External Requisition</u>
- Requisition: How to Set Up an External Contract Blanket Order

Business Services 'How To' Documents

- Requisition: How to Prepare an External Requisition
- Requisition: <u>How to Complete a Cancellation Order</u>
- Requisition: How to Correctly Handle a Continuing Order Requisition (COR) for External Blanket Orders
- Requisition: <u>How to Complete a Change Order</u>
- Requisition: <u>How to Set Up a Specific Blanket Order</u>
- Research: <u>How to Pay Human Subjects</u>
- Returns: How to Return Purchases to an External Vendor
- Returns: <u>How to Return Purchases to MDS (Including Prime Vendors-Office Depot, Fisher Scientific and Grainger)</u>

S

- Sale: How to Sell, Dispose of, or Trade In an Item or Piece of Equipment
- Security Systems: <u>How to Get an Alarm System Installed</u>
- Sell: How to Sell, Dispose of, or Trade In an Item or Piece of Equipment
- Services: How to Purchase Goods and Services at the University of Wisconsin-Madison
- Shipping: How to Obtain Shipping Services at UW-Madison
- Shipping: <u>How to Ship a Package Using United Parcel Service (UPS) through MDS</u>
- Shipping: <u>How to Ship UPS with your Purchasing Card</u>
- Signature: How to Get a Document Signed by a University Official
- Specific Blanket Order: <u>How to Set Up a Specific Blanket Order</u>
- Study Abroad: <u>How to Enroll in Study Abroad Insurance</u>

Т

- Tax: How to Find Information on the University's Tax Exempt Status
- Tax: How To Determine Which Tax Related Documents are Required When Making Non-Payroll Payments at UW-Madison
- Tax: How to Obtain/Apply for a Taxpayer Identification Number for Non-Resident Aliens
- Theft: <u>How to Report a Property Claim</u>
- Track: How to Track the Path of an External Requisition
- Trade In: How to Sell, Dispose of, or Trade In an Item or Piece of Equipment
- Training: <u>How to Obtain Reimbursement for Job Training/Career Education Expenses</u>
- Trial: How to Obtain Products or Equipment for Trial, Evaluation, Demonstration or Loan
- Transaction: <u>How to Get an Emergency Transaction (ET) Processed</u>
- Travel: <u>How to Complete a Travel Expense Report (TER)</u>
- Travel: How to Document Airfare, Lodging or Registration Fee Payments Made Over the Web
- Travel: How to Determine What to Enter in the SSN Field of a TER
- Trave Card: <u>How to Access Travel Card Account Information Online</u>

U

- University Book Store: <u>How to Purchase from The University Book Store</u>
- UPS: How to Ship a Package Using United Parcel Service (UPS) through MDS
- UPS: How to Obtain Shipping Services at UW-Madison

Business Services 'How To' Documents

• UPS: How to Ship UPS with your Purchasing Card

V

- Vehicle: How to Rent or Lease a Vehicle
- Vendors: How to Find a Minority Vendor
- Vendors: How to Determine if a Vendor is Ineligible
- Vendors: How to Handle a Vendor Non-Performance Complaint
- Vendor Refunds: <u>How to Process Vendor Refunds</u>

W

- Waiver: How to Prepare a Basic Release of Liability
- Wire: How to Make Foreign Payments by Wire or Draft
- Wires: How to Notify Cash Management of Incoming Department Wire/ACH
- Wires: How to Notify Cash Management of Outgoing Draft/Wire Payments
- WISDM: How to Find Purchasing Card Transactions on WISDM
- WISDM: How to Get Authorized for WISDM
- WISDM: How to Use Vendor Search in WISDM for SFS AP Transactions

X

Y

Z

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