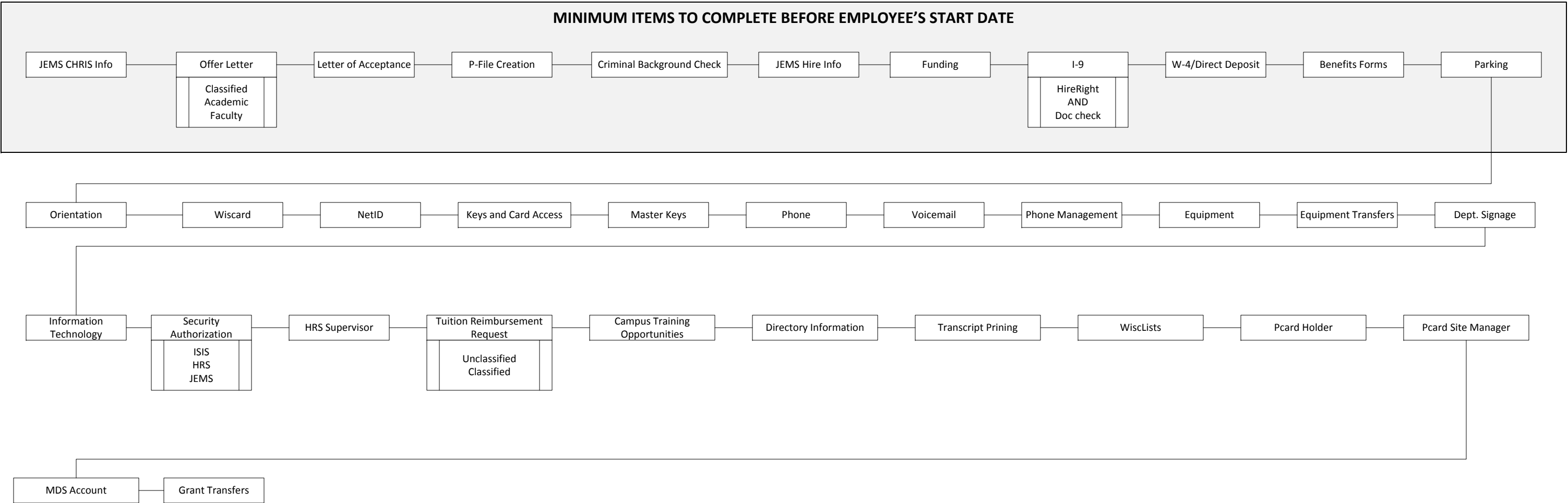


**MINIMUM ITEMS TO COMPLETE BEFORE EMPLOYEE'S START DATE**



JEMS CHRIS Information

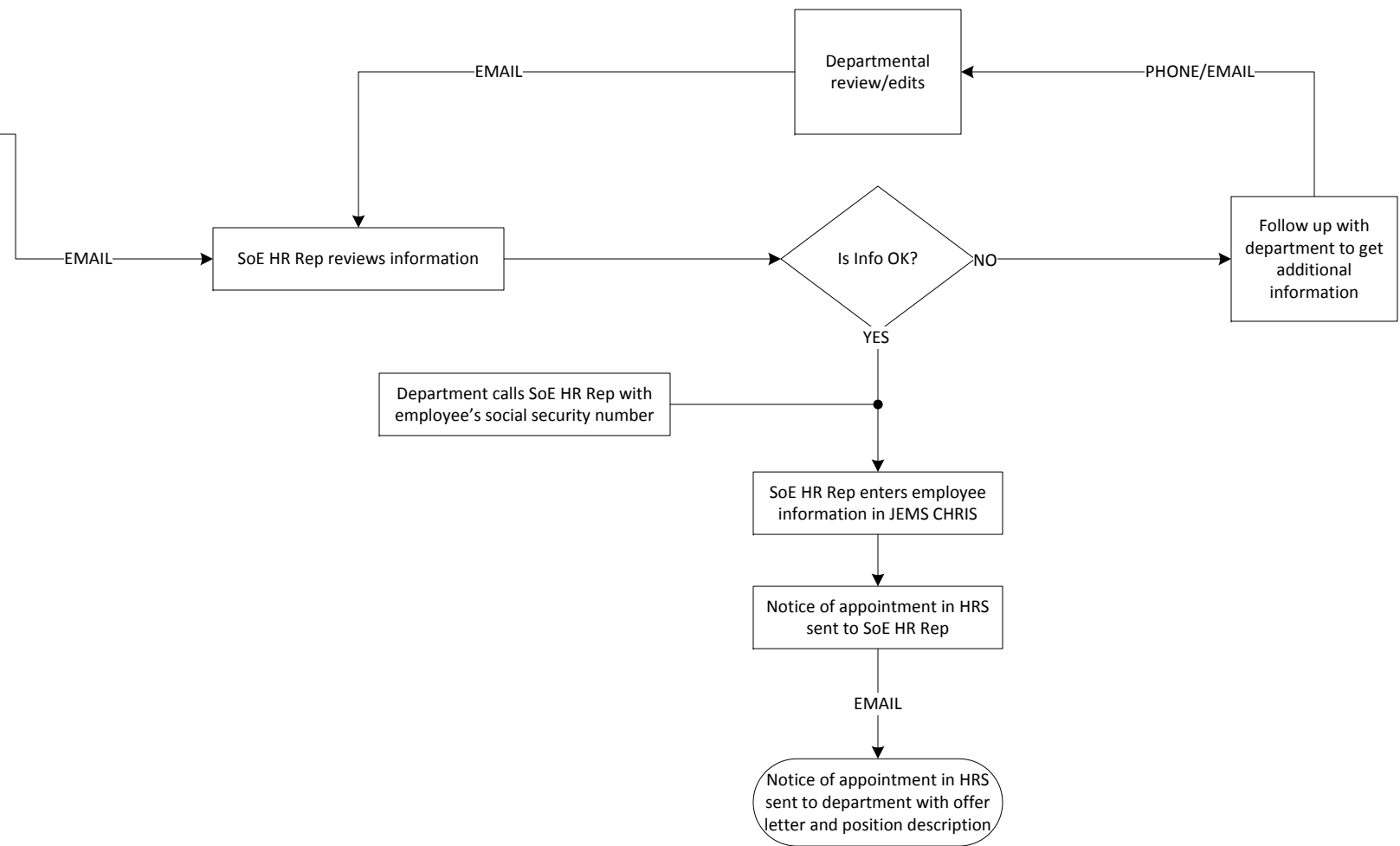
Pre-Offer Hire Information – Classified Only

Classified:

Submit employee information to SoE HR Rep

JEMS CHRIS Information Submitted  
Date submitted: [Click here to enter a date.](#)

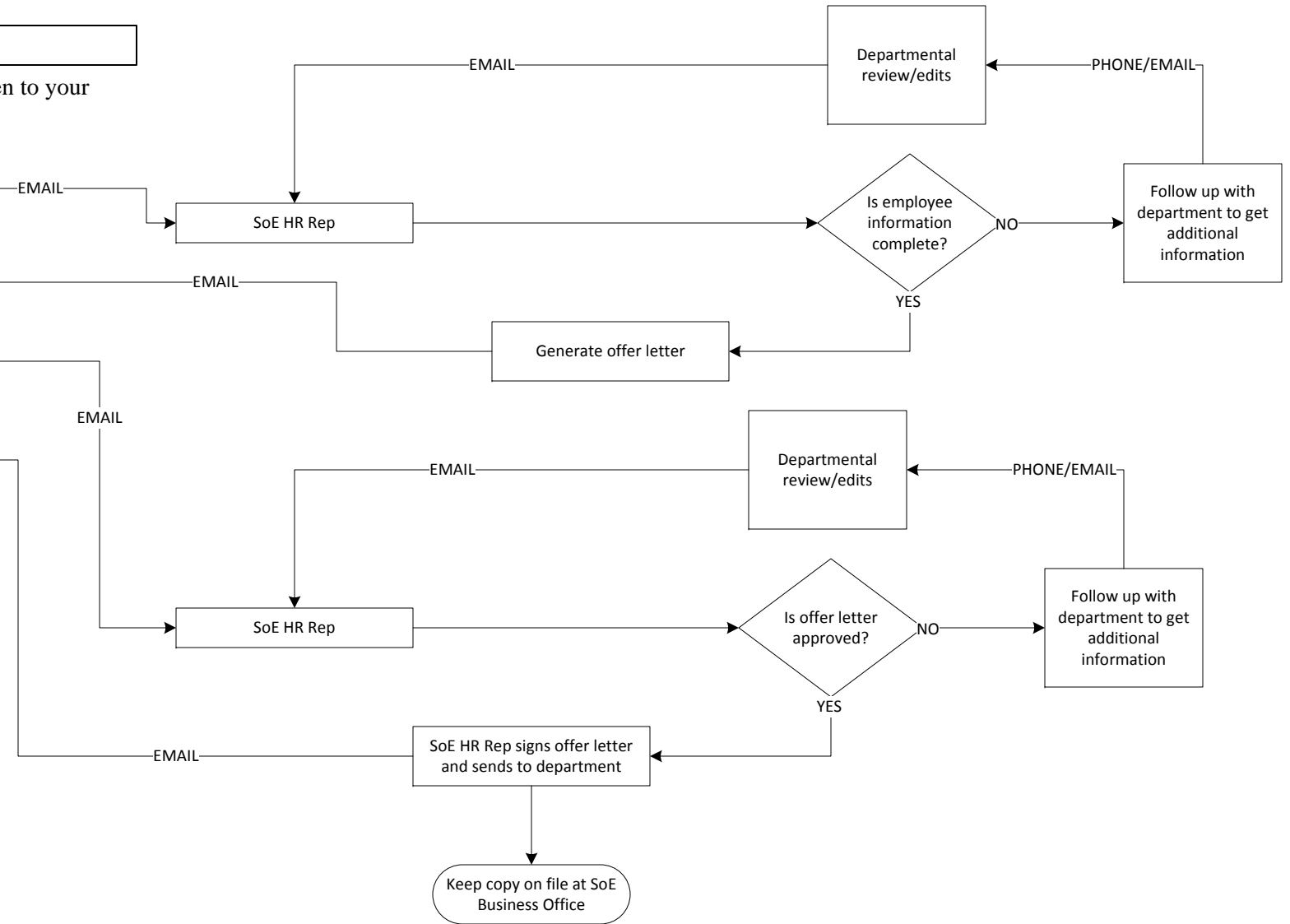
not applicable



## Letter of Offer – Classified

Classified Staff – letters are generated at the division level. Employee information must be given to your divisional HR representative 7-10 business days prior to employee’s start date.

- Employee information sent to divisional HR representative  
Date sent: [Click here to enter a date.](#)
- Offer letter generated by division and sent to department  
Date sent: [Click here to enter a date.](#)
- Offer letter signed by supervisor and sent to SoE HR Rep  
Date sent: [Click here to enter a date.](#)
- Offer letter signed by SoE HR Rep and sent to department  
Date sent: [Click here to enter a date.](#)
- Offer letter sent to employee  
Date sent: [Click here to enter a date.](#)
- not applicable

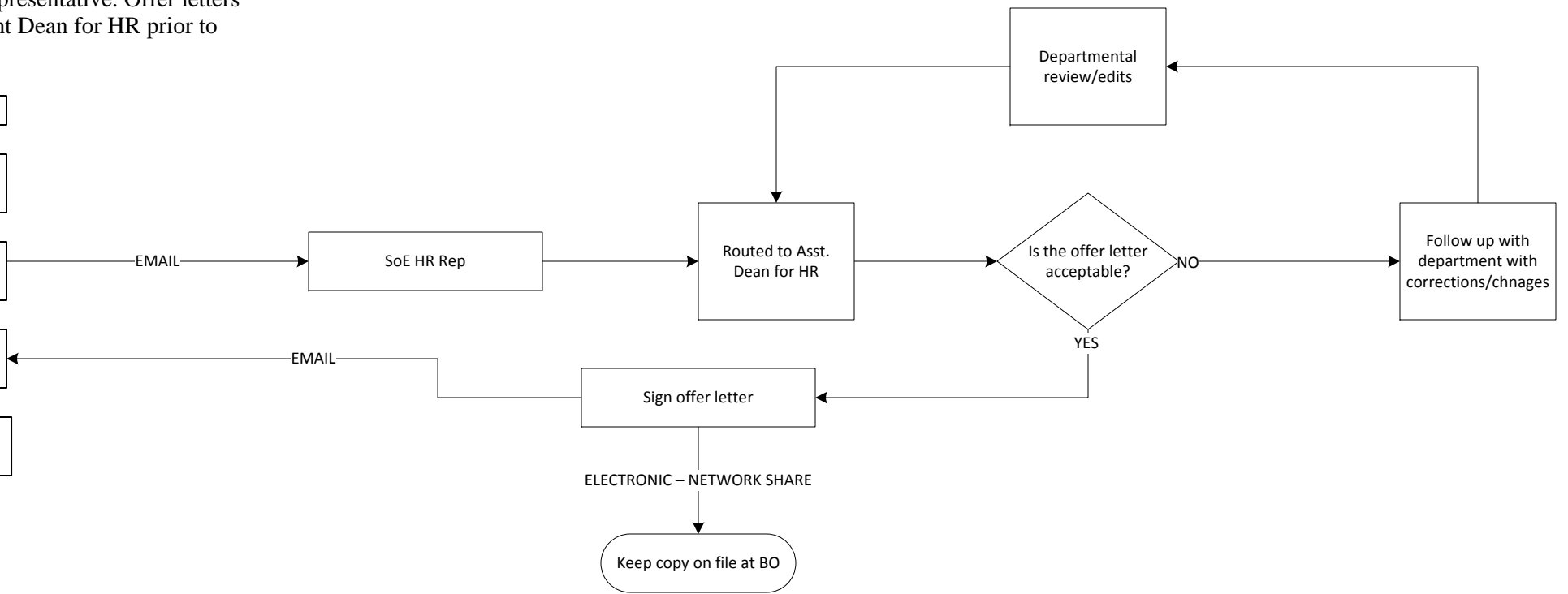


Letter of Offer – Academic Staff

Letter of Offer

Academic Staff – offer letter templates are available from your divisional HR Representative. Offer letters for Academic Staff must be signed by the employee’s supervisor and the Assistant Dean for HR prior to being sent to the employee.

- Offer letter drafted by department
- Offer letter signed by new employee’s supervisor  
Date signed: [Click here to enter a date.](#)
- Offer letter sent to divisional HR Representative  
Date sent: [Click here to enter a date.](#)
- Signed offer letter returned to department  
Date received by department: [Click here to enter a date.](#)
- Offer letter sent to employee  
Date sent: [Click here to enter a date.](#)
- not applicable

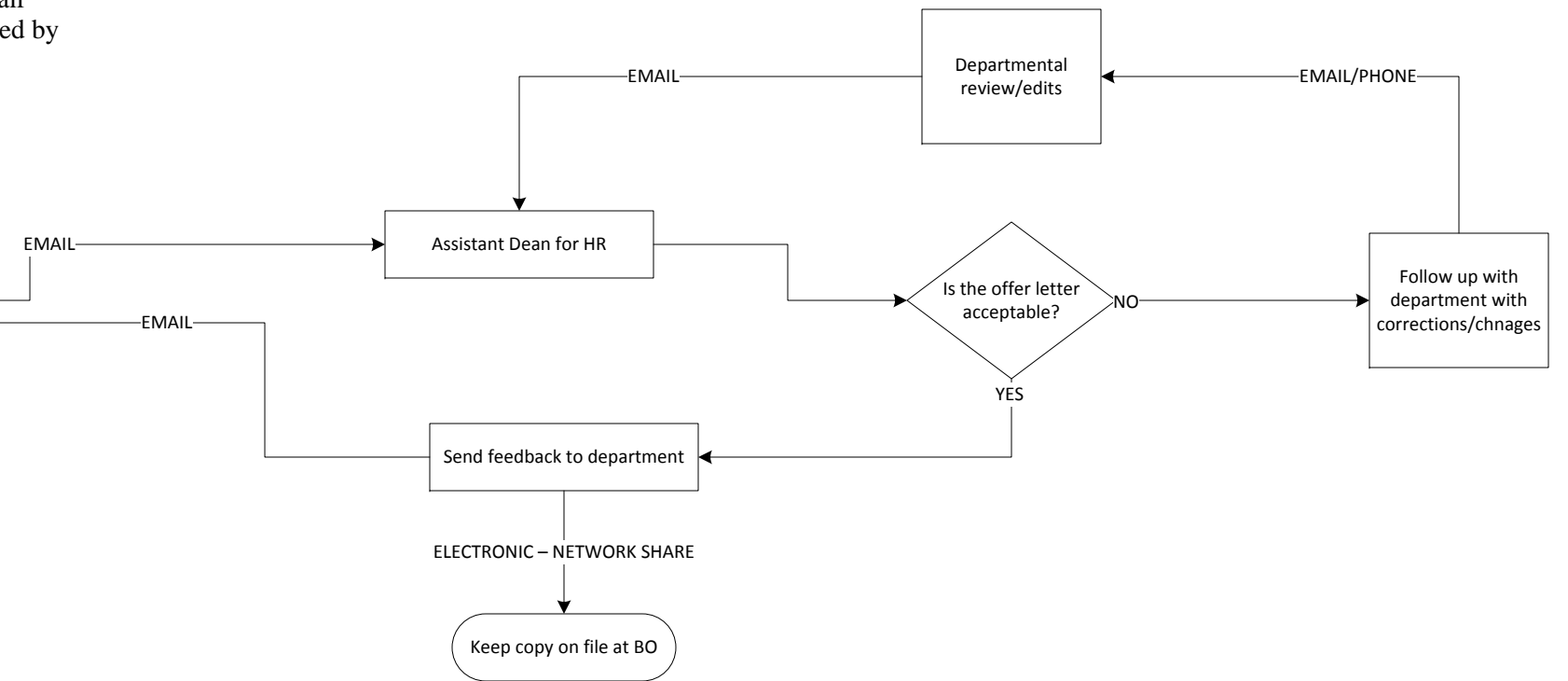


## Letter of Offer – Faculty

### Letter of Offer

Faculty offer letter templates are available from your divisional HR representative. The Department chair must sign a faculty offer letter before it is sent to the employee. All faculty offer letters must be reviewed by the Assistant Dean for HR before it is sent to the employee.

- Offer letter drafted by department
- Offer letter signed by department chair.  
Date signed: [Click here to enter a date.](#)
- Offer letter reviewed by Assistant Dean for HR  
Date reviewed: [Click here to enter a date.](#)
- Offer letter sent to employee  
Date Sent: [Click here to enter a date.](#)
- not applicable



Signed Offer Letter or Written Acceptance of Offer

Signed Offer Letter or Employee Written Acceptance of Offer

Division office must receive a signed letter of offer or a written acceptance of offer; as well as start date, and standard work hours or percentage of FTE at least 7-10 business days prior to employee start date.

Acceptance of offer received by department  
Date received: [Click here to enter a date.](#)

Acceptance of offer sent to division office  
Date sent: [Click here to enter a date.](#)

EMAIL

SoE HR Rep

ELECTRONIC – NETWORK SHARE

Keep copy on file at BO

## Establish Personnel File

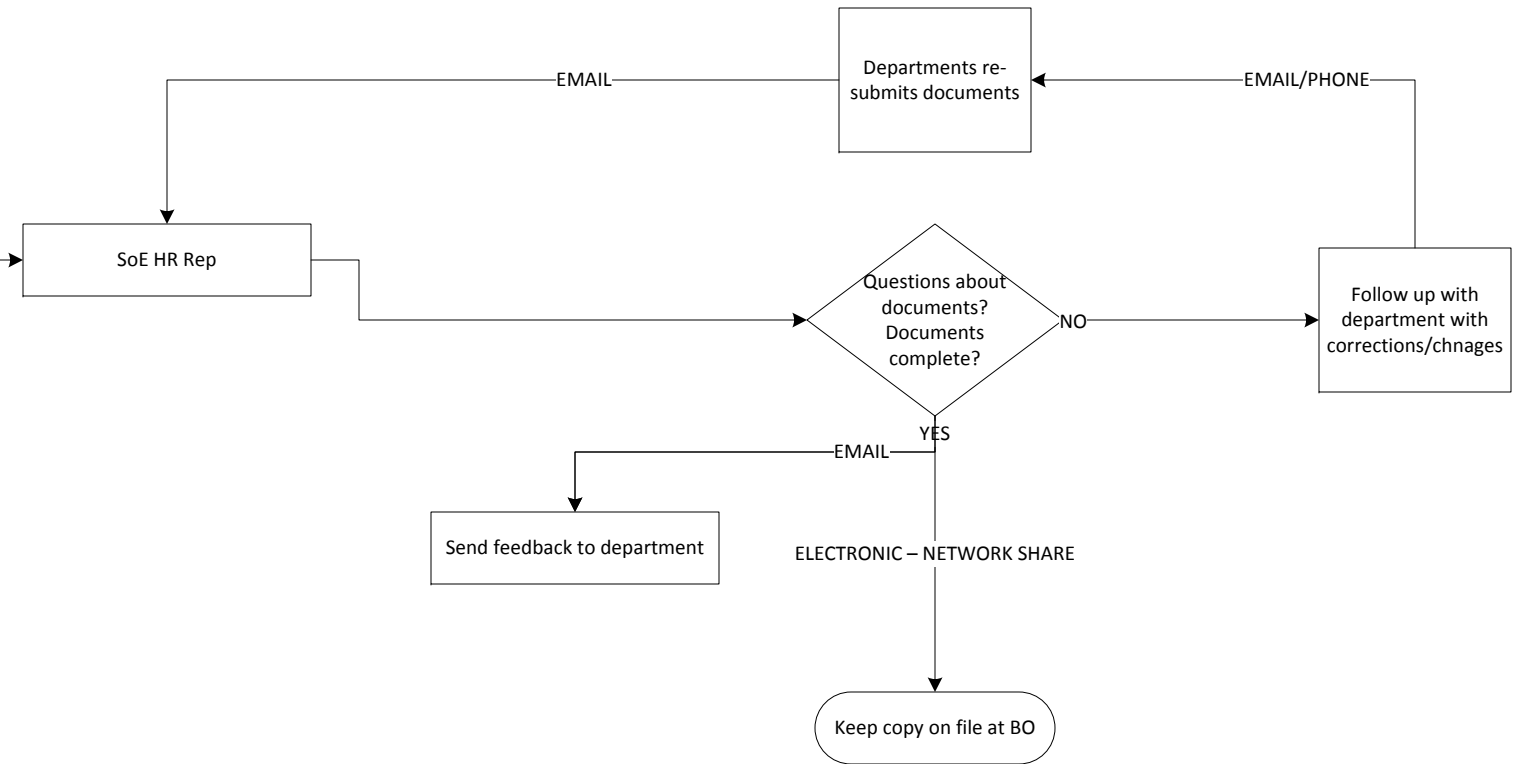
### Establish a Personnel File

The SoE Business Office will create and manage the personnel file of record for all SoE employees. This file must contain all appointment related documents – resume, application, job description, evaluations, etc. If you have questions about what should be sent to the SoE Business Office for the personnel file of record, please contact your SoE HR Rep.

- All appointment related document sent to SoE HR representative  
Date sent: [Click here to enter a date.](#)

The departmental personnel file is not considered the personnel file of record, but may be maintained by the department with both appointment information and historical records as desired.

- Personnel file created by department



# Background Check

## Background check

Submit background check request:

<http://businessoffice.education.wisc.edu/bo/hr-payroll-benefits/cbc/cbc-request-form>

Background check request submitted  
Date submitted: [Click here to enter a date.](#)

SOE WEB FORM

Processed by SoE Business Office

HireRight

CBC Submitted

Results sent to SoE HR Rep

SoE Business Office keeps a record of all CBC results

GOOD

Email notice sent to department

Department enters date of Good CBC in HRS

Person can not be hired due to CBC results

SoE HR Rep sends notice to dept

IN REVIEW

UW OHR Reviews the CBC results

NO

Acceptable?

YES

Sent of SoE Assistant Dean for HR for review

Acceptable?

NO

YES

Email

BAD

Email



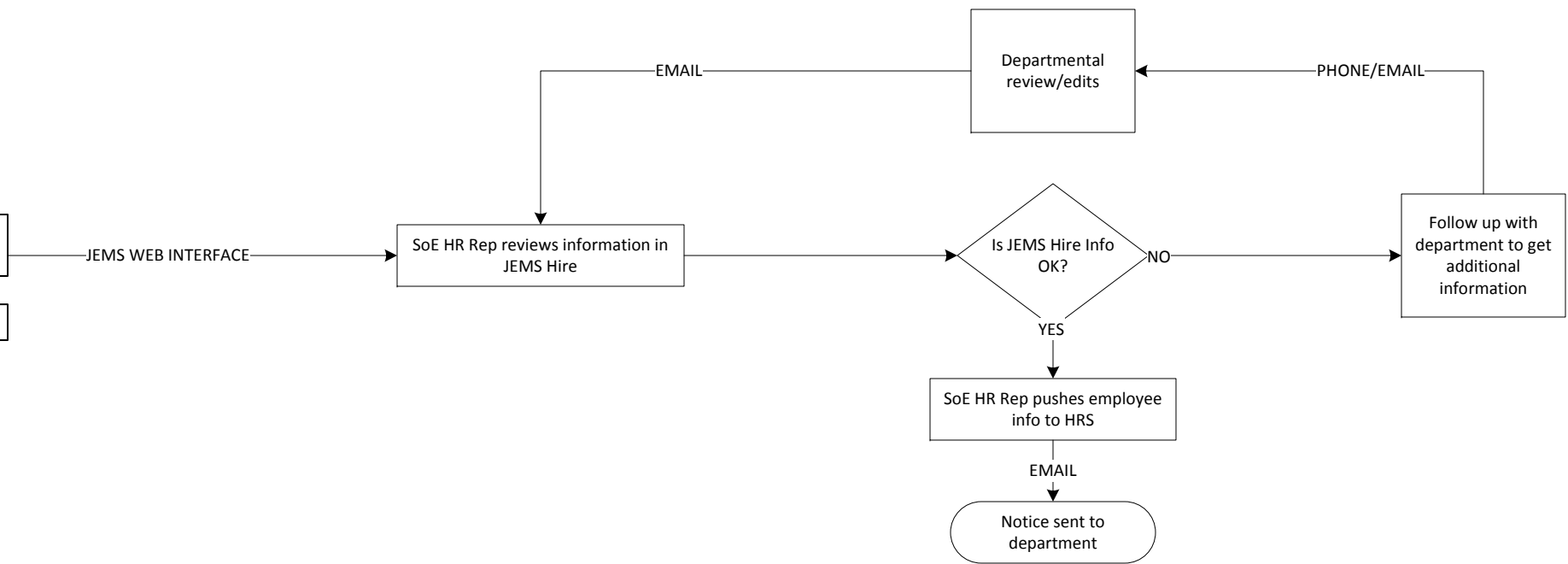
# JEMS Hire Information

## Hire Information – Academic Staff and Faculty Only

After acceptance is received from the employee, enter hire information:

Academic Staff and Faculty  
Enter hire information into JEMS Hire.  
<https://uwservice.wisc.edu/hrs/jems/>

- JEMS Hire Information Entered  
Date entered: [Click here to enter a date.](#)
- not applicable



## Funding

### Funding

You will receive an automated email confirming approval of the hire in HRS. After that email is received, add new funding in HRS. Appointment level funding only.

<https://kb.wisc.edu/hrs/page.php?id=15181>



Funding added to appointment in HRS  
Date added: [Click here to enter a date.](#)

Web Interface

Enter funding in HRS using the instructions from the KB article.

I-9 Submission:

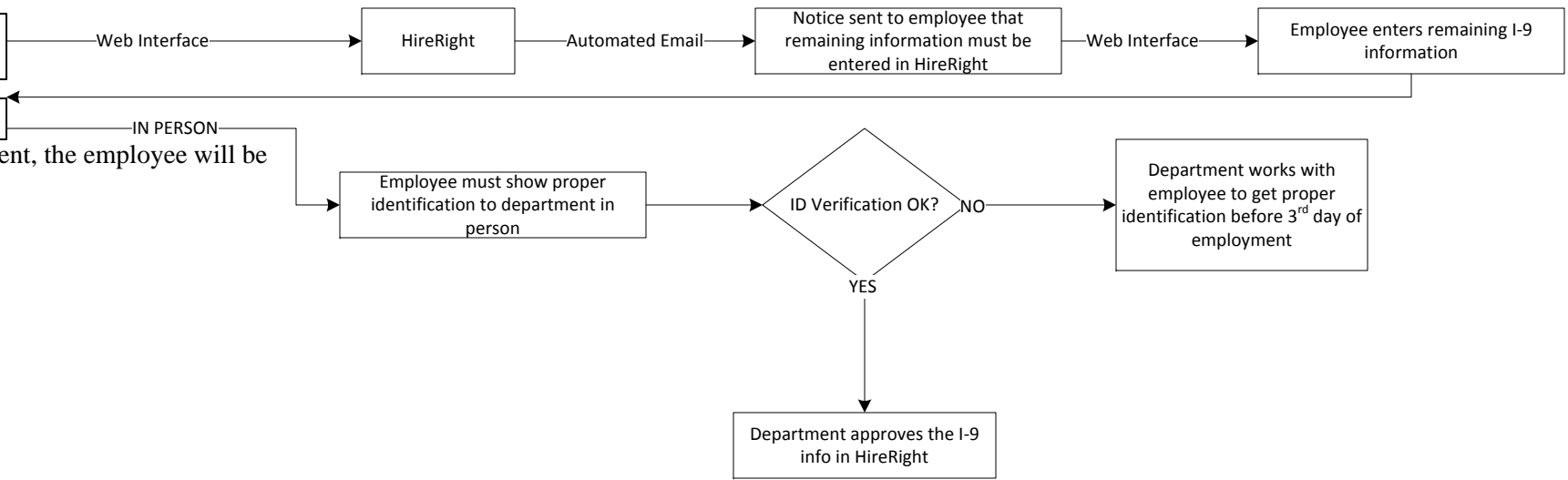
Department enters information into HireRight prior to employee start date.

Information entered into HireRight  
Date entered: [Click here to enter a date.](#)

Department approval and document review required by 3rd day of employment.

**\*\*NOTE: If ID verification and approval is not completed by 3<sup>rd</sup> day of employment, the employee will be taken off payroll.**

Approval and document review complete  
Date completed: [Click here to enter a date.](#)



# W-4 and Direct Deposit

Complete the forms below and submit to:  
Payroll & Benefits  
21 N. Park Suite 5101

W-4: <https://uwservice.wisc.edu/docs/forms/pay-employee-withholding.pdf>

W-4 completed and sent to Payroll & Benefits  
Date sent: [Click here to enter a date.](#)

Direct Deposit: <https://uwservice.wisc.edu/docs/forms/pay-direct-deposit.pdf>

Direct Deposit form completed and sent to Payroll & Benefits  
Date sent: [Click here to enter a date.](#)

Department provides link to new employee

Employee completes and submits to the department

Employee reviews/ edits

W-4 OK?

Department follows up with employee

W-4 Submitted to UW Payroll & Benefits

Department provides link to new employee

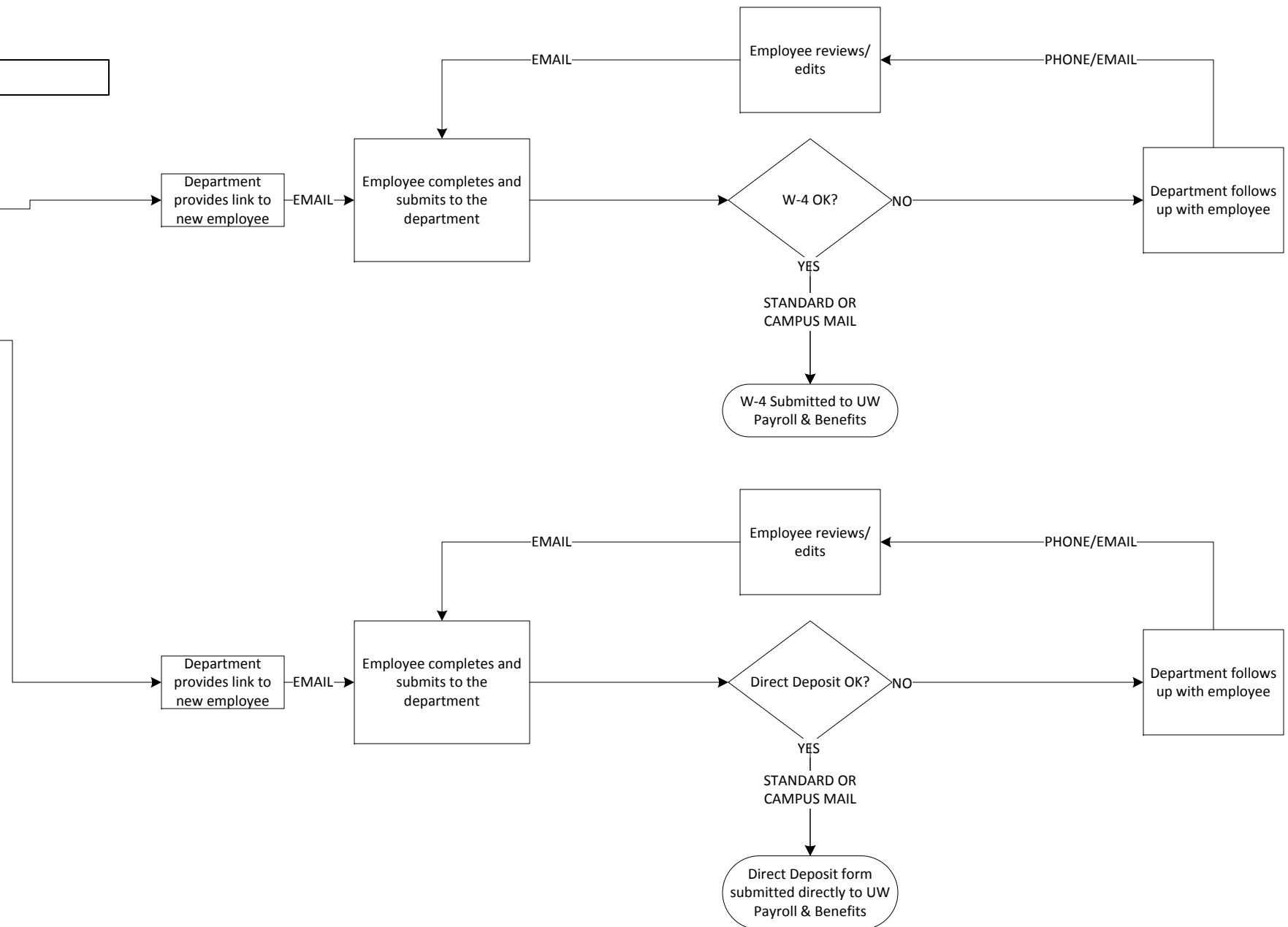
Employee completes and submits to the department

Employee reviews/ edits

Direct Deposit OK?

Department follows up with employee

Direct Deposit form submitted directly to UW Payroll & Benefits



# Benefits

## Benefits

It is the Department's responsibility to ensure the employee completes benefit forms within 30 days of start date.

Be sure employee registers for Benefits 101. A valid net ID is required to register. More info on Benefits 101 can be found online:  
[http://www.bussvc.wisc.edu/ecbs/benefits/New\\_Employee\\_PDFs/Benefits101\\_2010\\_UW1037.pdf](http://www.bussvc.wisc.edu/ecbs/benefits/New_Employee_PDFs/Benefits101_2010_UW1037.pdf)

Department provides link to new employee

EMAIL

Employee chooses to register and attend Benefits 101

- Employee registered for Benefits 101

It is recommended that employee completes the online benefits walkthrough. This can be done at any time:  
<http://uwservice.wisc.edu/ebenefits/index-new.php>

Department provides link to new employee

EMAIL

Employee chooses to do Online Benefits Walkthrough

- Link to benefits walkthrough sent to employee  
Date sent: [Click here to enter a date.](#)

Benefit information and forms can be found here:  
<http://www.bussvc.wisc.edu/ecbs/benefits/newemp-introduction-reg.html>

Department provides link to new employee

EMAIL

Employee completes benefit applications

Benefits applications submitted to department or SoE HR Rep for completion

Benefits applications sent by department to UW Payroll & Benefits

- Benefit forms completed and submitted  
Date submitted: [Click here to enter a date.](#)

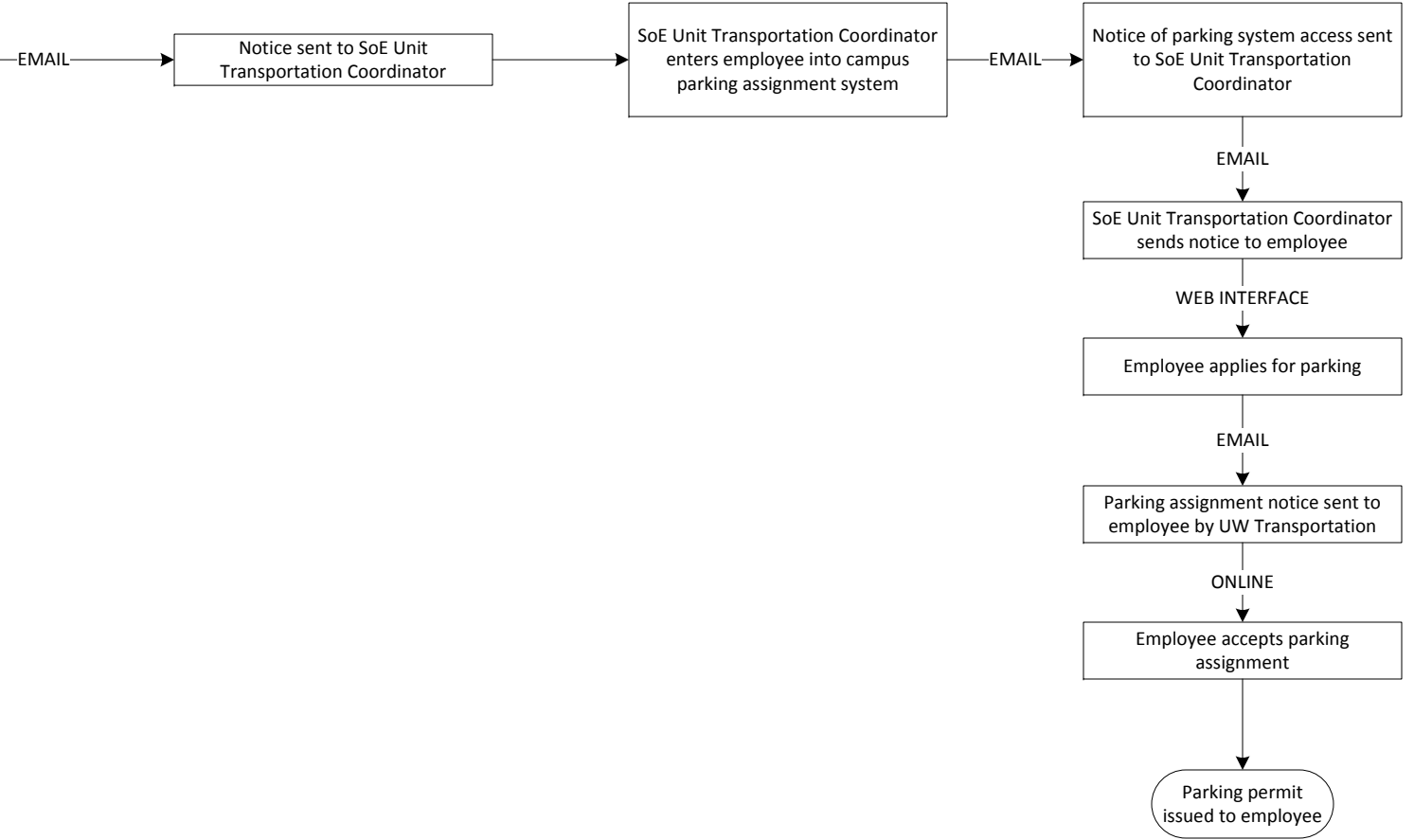
Parking

Parking

Please email SoE's Unit Transportation Coordinator if the new employee would like to apply for parking. The Unit Transportation Coordinator will add him/her to the parking application system.

- SoE Unit Transportation Coordinator notified via email  
Date notified: [Click here to enter a date.](#)
- This employee will not apply for parking.

UW-Madison parking permits are managed by UW Transportation.  
For more information and directions on parking permit applications: [http://transportation.wisc.edu/parking/Permit\\_General\\_info.aspx](http://transportation.wisc.edu/parking/Permit_General_info.aspx)



## Orientation

### Orientation

Employees new to the university should register for New Employee Orientation. A valid net ID is required to register.

<https://www.ohrd.wisc.edu/OHRDCatalogPortal/Default.aspx?tabid=29&CourseGroupKey=12082>

[Employee registered for New Employee Orientation](#)

Department provides link to new employee

EMAIL

Employee chooses to registered and attend New Employee Orientation

Wiscard

WISCARD

An employee can obtain a Wiscard only after he/she is entered in HRS. An employee can obtain a Wiscard after he/she is entered in HRS. A Wiscard can be obtained prior to the employee's start date, as long as they are entered in HRS.

New employees should get a Wiscard as soon as possible; it is needed for other items on this list.

For more information and required documentation: <http://www.wiscard.wisc.edu/>

Employee has a Wiscard  
Date received: [Click here to enter a date.](#)  
UW ID No.: [Click here to enter text.](#)

Department provides link to new employee

EMAIL

Employee goes to Wiscard Office at Union South with proper docuemntation

Employee send UW ID number to department

Employee receives a Wiscard

EMAIL



# UW NetID

## UW NetID

Account activation: <https://kb.wisc.edu/ams/page.php?id=1140>

Need Wiscard with ID # to request NetID. Unless you do early activation.

For early activation, contact divisional HR representative.

New employees should get a UW NetID as soon as possible; it is needed for other items on this list.



Employee has a UW NetID

Date received: [Click here to enter a date.](#)

Employee NetID: [Click here to enter text.](#)

Department provides link to new employee

EMAIL

Employee goes online to activate UW Net ID

Employee sends UW Net ID to department

UW Net ID activated

EMAIL

SoE Office Assignment

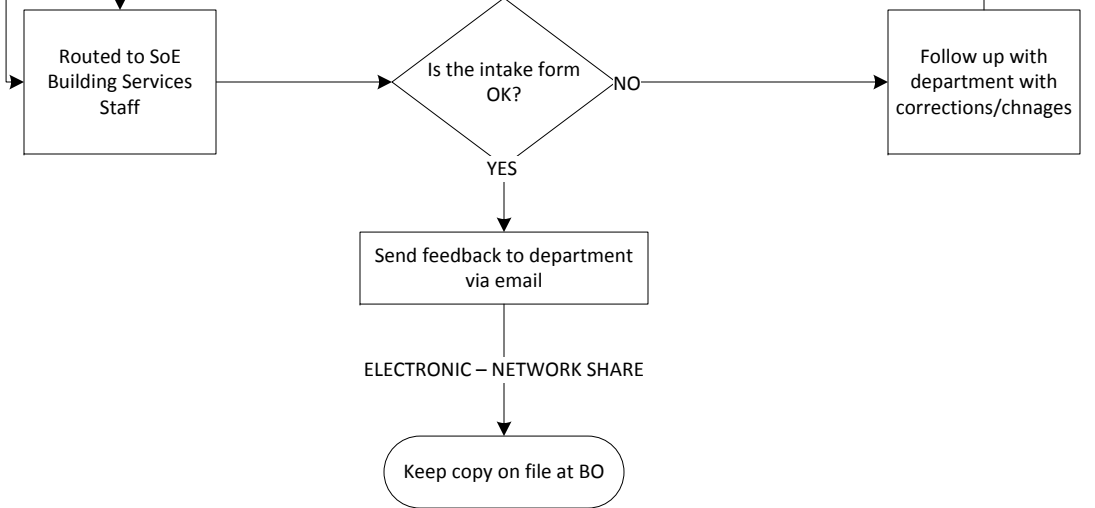
SoE Office Assignment

Complete the SoE New Employee – Facilities Intake Form [Link here pending publication of form online](#)

- SoE New Employee Facilities Intake Form submitted  
Date Submitted: [Click here to enter a date.](#)

EMAIL

buildingservices@education.wisc.edu



## Key and Card Access

### Key and Card Access

Key and card access management is delegated to SoE Local Access Key Controllers. See SoE's Key Control Policy for details: [link here – pending publication of policy online](#)

Employee must have a valid Wiscard before key card access can be granted. (see Wiscard section above)

The employee's supervisor must submit a SoE Access Key Request: <http://businessoffice.education.wisc.edu/bo/building-services/building-access-request>

SoE Access Key Request form submitted  
Date submitted: [Click here to enter a date.](#)

Keys and/or card access issued to employee  
Date: [Click here to enter a date.](#)

EMAIL

access@bosupport.education.wisc.edu

RT Ticket assigned to appropriate SoE Local Access Key Controller(s)

Request approved?

NO

YES

Department resubmits with changes

Follow up with department with corrections/chnages

Keys

Card Access

SoE Local Access Key Controller notifies employee and department that approved keys are ready for pick up

Andover Security Interface  
SoE Local Access Controller assigns card access for approved building(s) area(s)

Employee picks up keys and signs a key issue form for each key

Send notice of card access authorization to employee

Save approved request form and scanned key issue forms on the SoE Network

SoE Local Access Key Controller Tasks

Send approved request form and scanned key issue forms to employee and employee's supervisor

Scan key issue form(s)

Change inventory file for key box

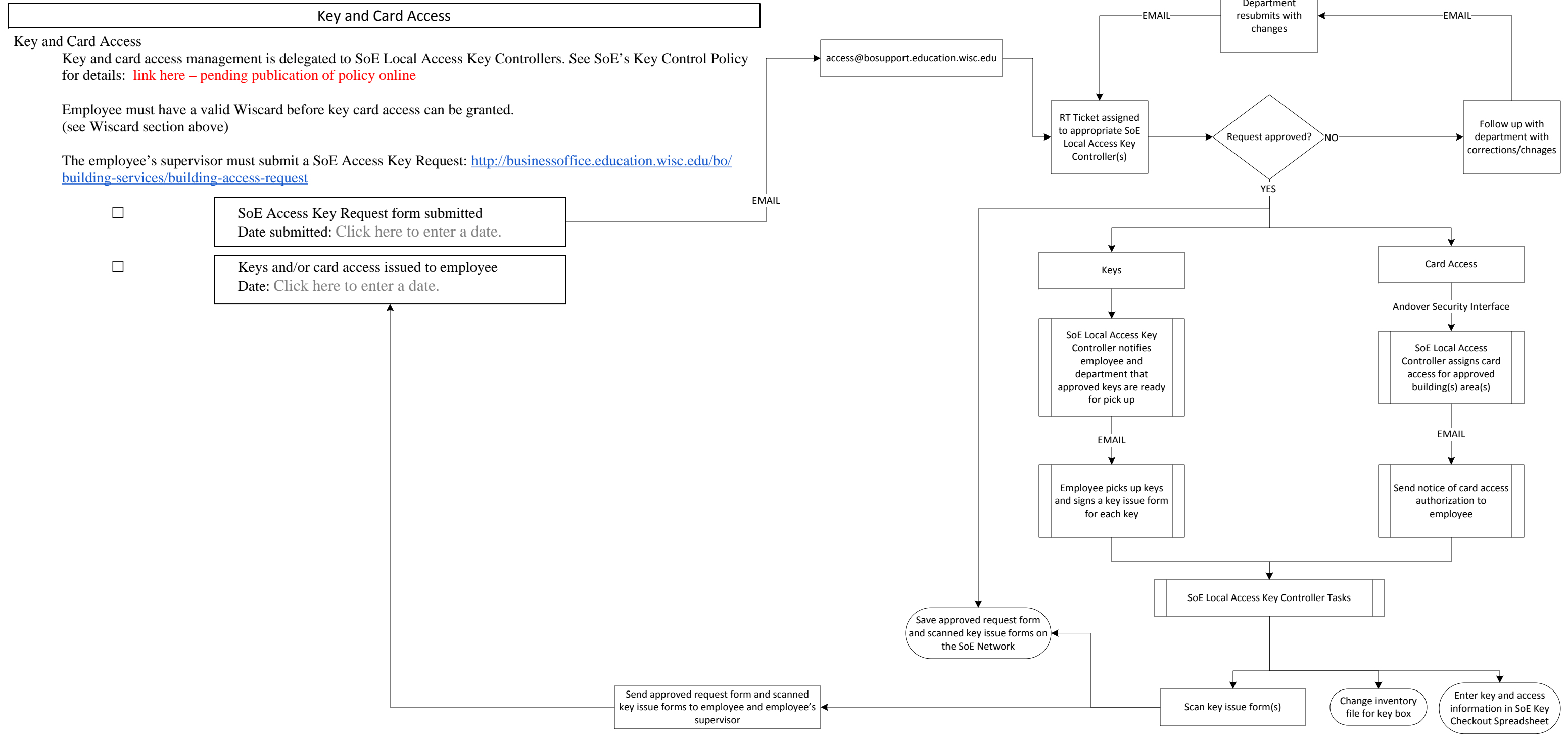
Enter key and access information in SoE Key Checkout Spreadsheet

EMAIL

EMAIL

EMAIL

EMAIL



# Master Level Keys

## Master Level Keys

For employees requiring master level keys, please SoE's Key Control Policy for details [link here pending publication of policy online](#)

Master key requests must be submitted by Department Chairs or Unit Directors to the SoE Access Key Controller via the SoE Master Key Request Form. [\*\*Link...]  
Each master key ordered must be assigned to an employee and that assignee must pick up the master key(s) in person at the UW Locksmith Shop. A valid Wiscard is needed for pick up.



SoE Master Key Request Form submitted  
Date Submitted: [Click here to enter a date.](#)

EMAIL

keys@bosupport.education.wisc.edu

RT Ticket assigned to SoE Access Key Controller

Department resubmits with changes

Follow up with department with corrections/chnages

Master Key Request submitted to UW Lockshop

ONLINE PORTAL

Request approved?

YES

Request approval sent to employee and SoE Access Key Controller

Notice that key(s) is ready for pick up sent to employee and SoE Access Key Controller

Employee picks up key(s) in person at UW Lockshop

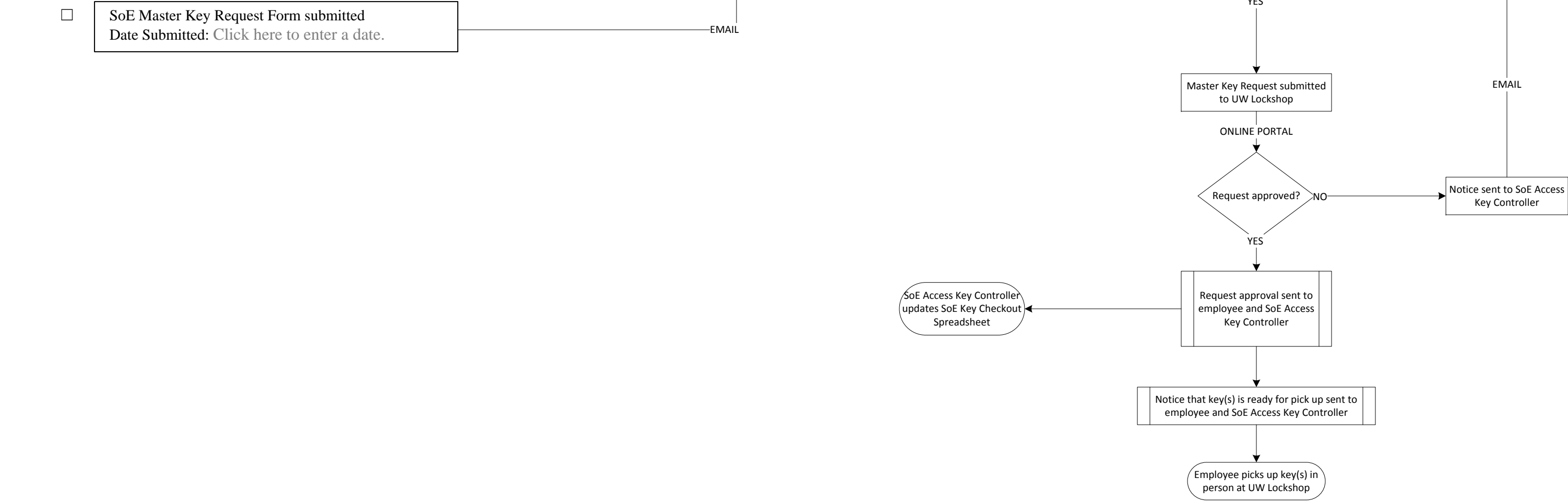
SoE Access Key Controller updates SoE Key Checkout Spreadsheet

Notice sent to SoE Access Key Controller

EMAIL

EMAIL

EMAIL



## Phone

### Phone

Phone service is managed by DoIT.

DoIT Voice Services Information: <http://www.doit.wisc.edu/telephone/centrex/>

#### New employee phone information

- This employee will have an assigned phone line  
Phone number: [Click here to enter text.](#)  
Phone jack number: [Click here to enter text.](#)  
 Department follows instructions from DoIT to request phone service
- This employee will not have an assigned phone line
- This employee will have a UW-owned mobile phone  
UW-owned Mobile Number: [Click here to enter text.](#)  
UW-owned Mobile Make/Model: [Click here to enter text.](#)  
 Department follows instructions from DoIT to request phone service
- This employee will not have a UW-owned mobile phone

Voicemail

Voicemail

Voicemail is managed by DoIT.

DoIT Voicemail Information: [http://www.doit.wisc.edu/telephone/voice\\_mail/](http://www.doit.wisc.edu/telephone/voice_mail/)

- This employee has voicemail enabled on his/her UW phone line
- This employee does not have voicemail enabled on his/her UW phone line

Department follows instructions from DoIT to request voicemail

# Phone Line Management

## Phone Line Management

If the employee needs to manage phone lines and/or phone bills for the department, a Telecommunication Authorization Form must be filled out and sent to the Associate Dean for Administration for approval. The Associate Dean for Administration will sign the request and send it to DoIT. [http://www.doit.wisc.edu/telephone/TAR\\_auth.pdf](http://www.doit.wisc.edu/telephone/TAR_auth.pdf)

TAR submitted to SoE Business Office  
Date submitted: [Click here to enter a date.](#)

TAR approved and submitted to DoIT  
Date submitted: [Click here to enter a date.](#)

This employee will not manage phone lines or reports for the department

Notification that Authorization is complete???

EMAIL

CAMPUS MAIL OR FAX

ELECTRONIC – NETWORK SHARE

EMAIL

EMAIL

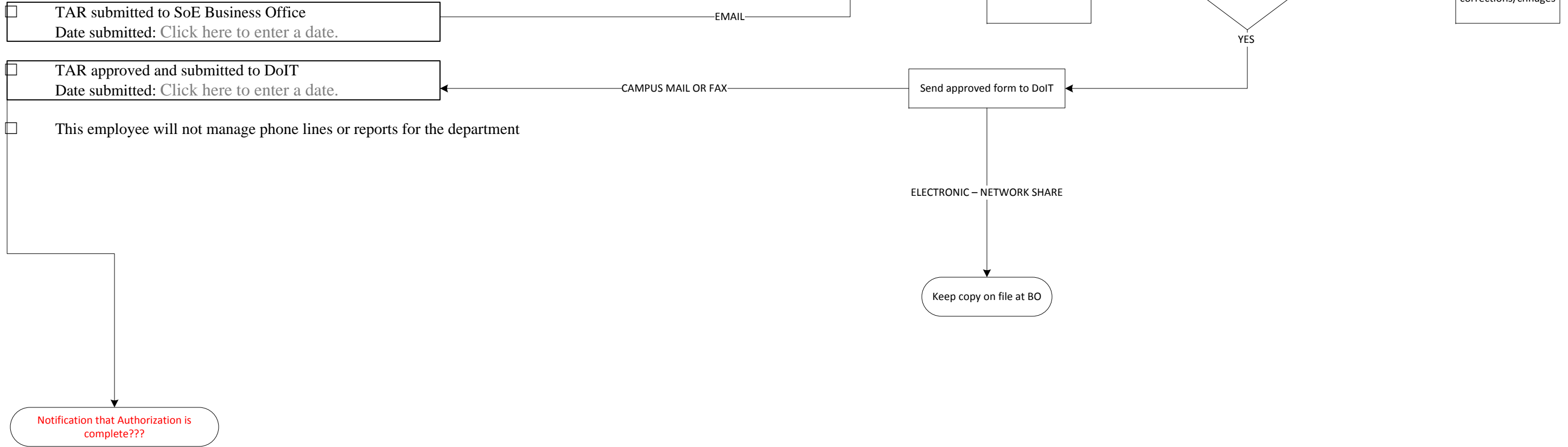
Keep copy on file at BO

SoE Associate Dean for Administration

Department re-sends written acceptance

Is TAR approved

Follow up with department with corrections/chnages

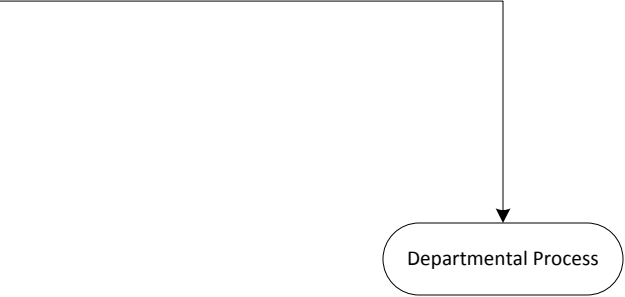


Equipment

Equipment

This is a reminder to organize any departmental equipment for a new employee. (i.e. - laptops, cell phone, camera, etc.)

<u>Ready</u>	<u>Item Information</u>
<input type="checkbox"/>	Click here to enter text.
<input type="checkbox"/>	Click here to enter text.
<input type="checkbox"/>	Click here to enter text.
<input type="checkbox"/>	Click here to enter text.
<input type="checkbox"/>	Click here to enter text.
Other Items	Click here to enter text.





## Equipment Transfer

### Equipment Transfer

This item is for an employee who is transferring equipment to UW from another institution.

Items valued at \$5000 or more must be reported and inventoried with UW Property Control.

Use the Property Transaction Form:

<http://www.bussvc.wisc.edu/acct/propcont/proptran.html>

Property Transaction Form completed and submitted  
Date submitted: [Click here to enter a date.](#)

UW BUS SVCS WEB FORM

Online submission to UW  
Business Services

Reviewed by  
Property controlled

Department  
resubmits property  
information

EMAIL

EMAIL

Is transfer OK?

NO

Follow up with  
department with  
corrections/changes

not applicable

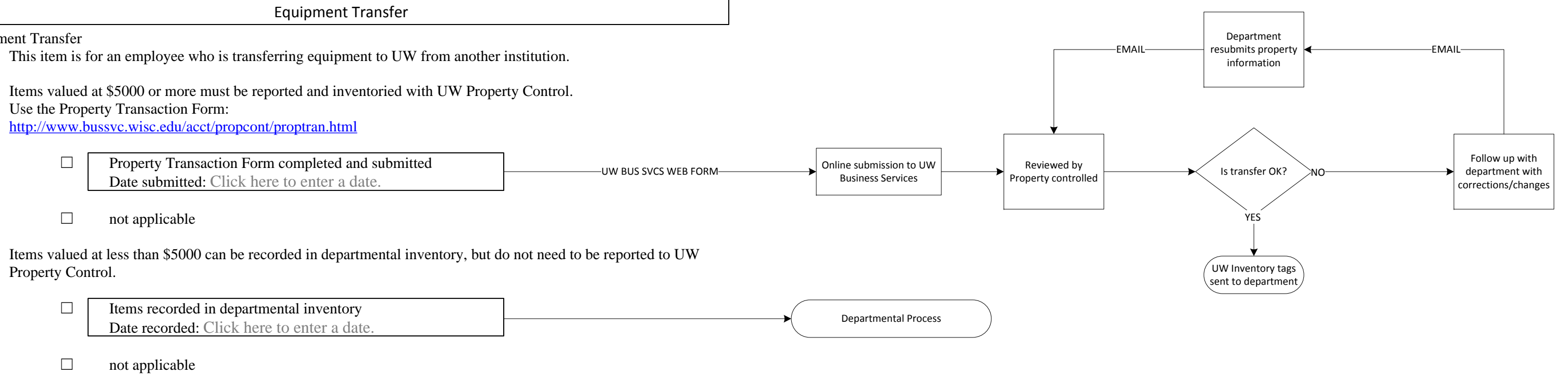
Items valued at less than \$5000 can be recorded in departmental inventory, but do not need to be reported to UW Property Control.

Items recorded in departmental inventory  
Date recorded: [Click here to enter a date.](#)

Departmental Process

UW Inventory tags  
sent to department

not applicable



## Departmental Signage

### Departmental Signage

Changing office or room signs is a departmental responsibility. Signs should conform to building standards.

Departments should contact the SoE Director of Facilities, Planning, & Management if there are any questions about sign standards or procedures.

#### Signs needing changes:

Click here to enter text.

Sign changes ordered

Date ordered: [Click here to enter a date.](#)

New signs in place

Date ordered: [Click here to enter a date.](#)

CALL or WEB PORTAL

Submit a work order to  
UW Physical Plant

Work order created  
and assigned to UW  
Sign Shop

Consult with UW  
Sign Shop on design,  
location(s), and cost  
for sign(s)

Signs produced and installed

Information Technology

Information Technology

Complete the SoE New Employee – IT Intake Form [\[Link here pending publication of this form online\]](#)

IT Intake Form completed and submitted  
Date submitted: [Click here to enter a date.](#)

EMAIL

Submit IT Intake Form to primary IT consultant

Department resubmits intake form

EMAIL

Follow up with department with corrections/changes

Is intake form OK?

NO

YES

Primary IT Consultant implements intake requests

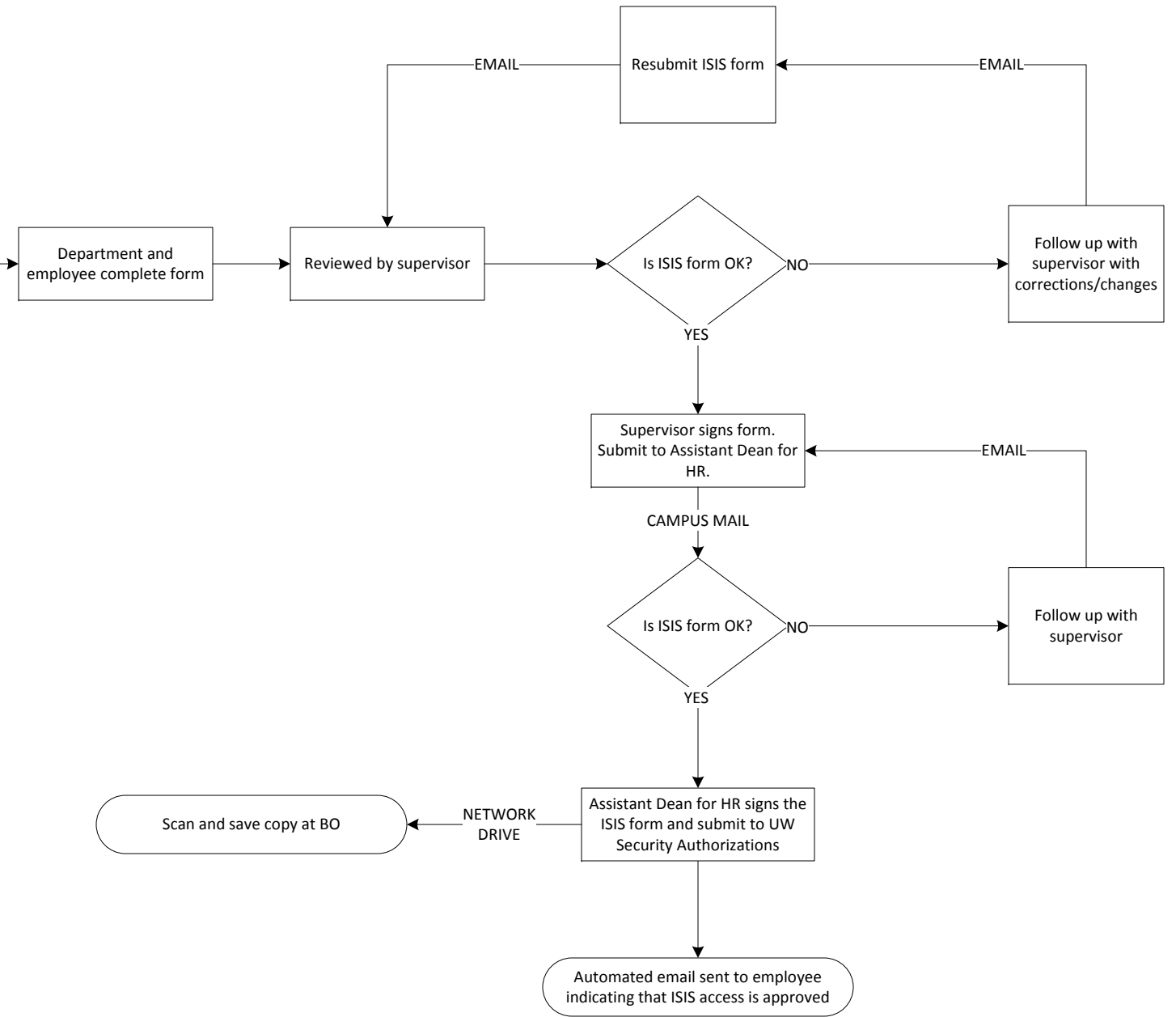
EMAIL

Primary IT Consultant confirms with department/employee that all requests are complete

Security Authorization - ISIS

Security Authorization - Campus IT Systems  
Departments must fill out these forms for new employees to access these campus systems.  
ISIS: [http://www.doit.wisc.edu/restricted/authorization/forms/isis\\_auth.pdf](http://www.doit.wisc.edu/restricted/authorization/forms/isis_auth.pdf)

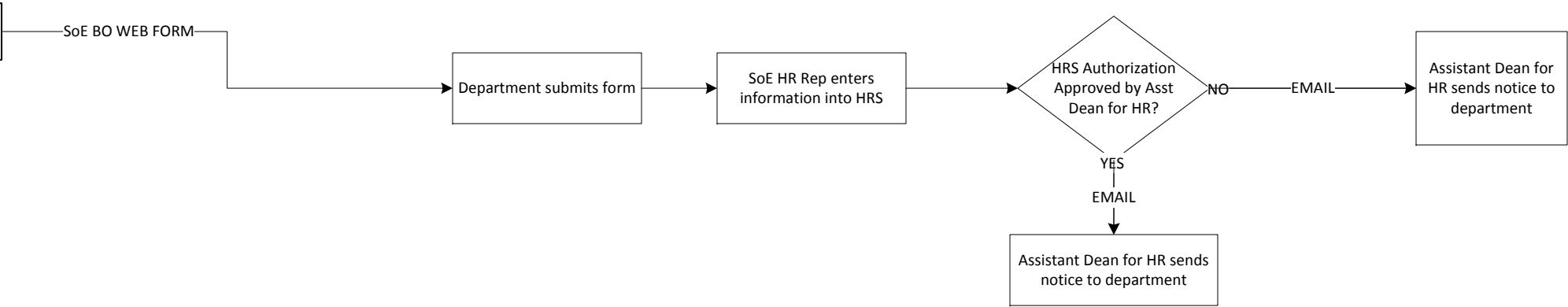
- ISIS authorization form submitted  
Date submitted: [Click here to enter a date.](#)
- not applicable



Security Authorization - HRS

HRS: <http://businessoffice.education.wisc.edu/bo/hr-payroll-benefits/forms/security-request-form>

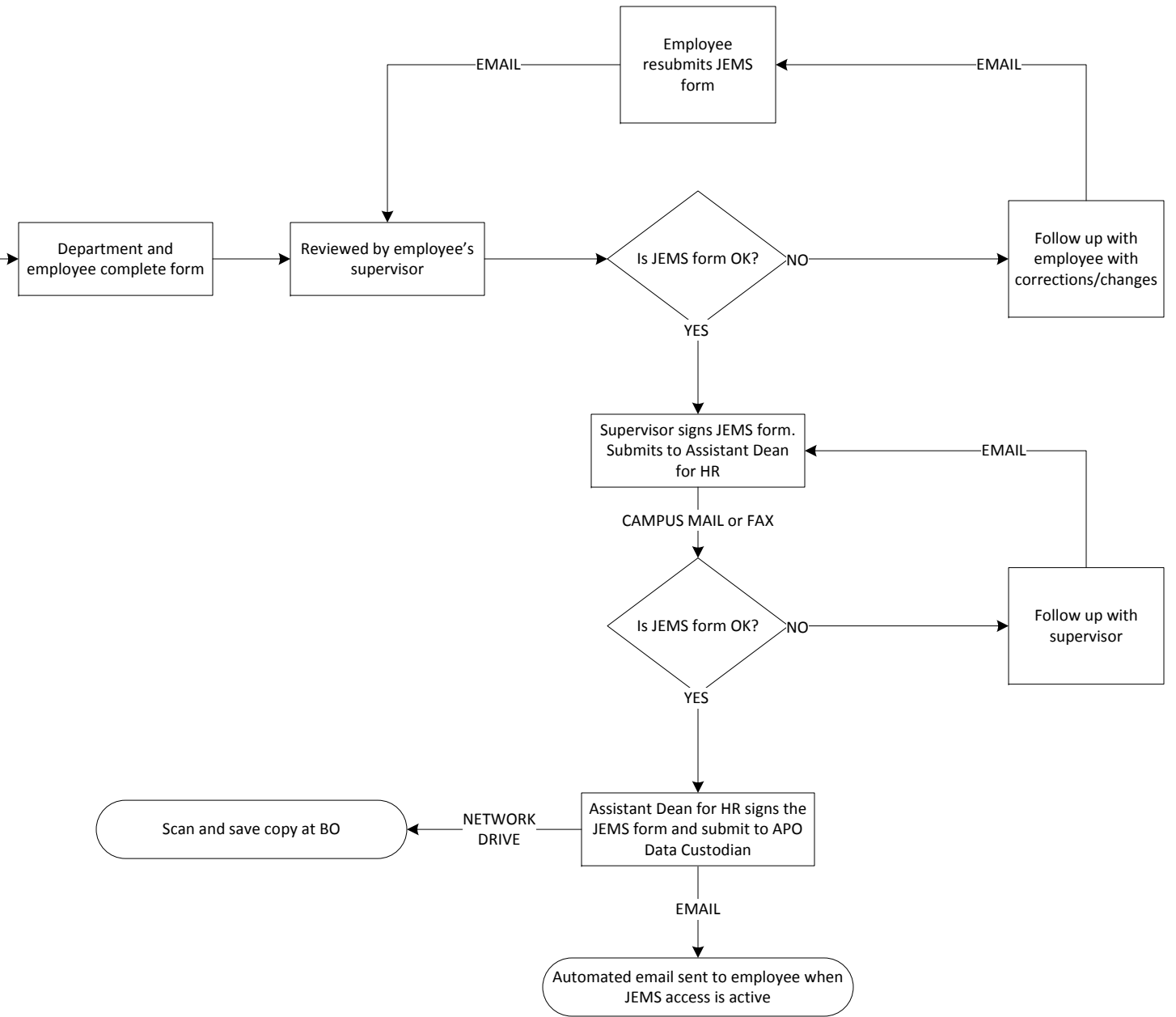
- HRS authorization form submitted  
Date submitted: [Click here to enter a date.](#)
- not applicable



Security Authorization - JEMS

JEMS: <https://uwservice.wisc.edu/docs/forms/jems-authorization-apo.pdf>

- JEMS authorization form submitted  
Date submitted: [Click here to enter a date.](#)
- not applicable



# HRS Supervisor

## HRS Supervisor – Classified Staff Only

This is the person who will supervise the employee and approve his/her timesheets.

Complete the HRS Supervisor Add/Change Form online:

<http://businessoffice.education.wisc.edu/bo/hr-payroll-benefits/forms/supervisor-add-change>

SoE Business Office assigns supervisor based on that form.

HRS Supervisor Add/Change Form submitted  
Date submitted: [Click here to enter a date.](#)

This employee's HRS Supervisor is:  
[Click here to enter text](#)

not applicable

SOE BO WEB FORM

Department submits web form

Routed to SoE HR Rep

Department resubmits form

EMAIL

EMAIL

Is form OK?

NO

Follow up with department with corrections/changes

SoE HR Rep assign HRS Supervisor as requested

SoE HR Rep confirm HRS Supervisor change with department

EMAIL

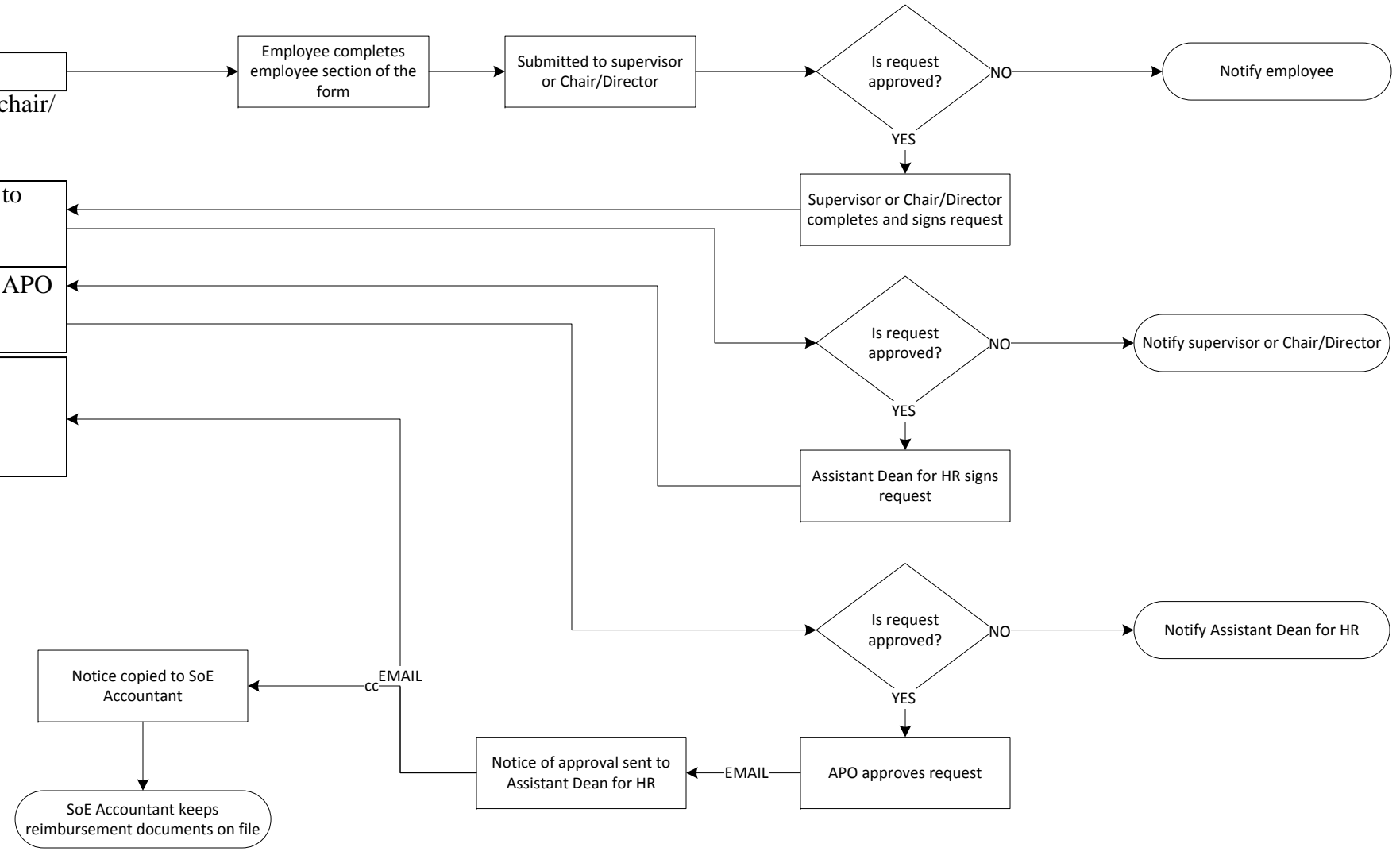
Tuition Reimbursement Request - Unclassified

Tuition Reimbursement Request – Unclassified Staff

Tuition reimbursement requires prior approval from employee’s supervisor, department chair/director, division dean/director, and APO.

Unclassified: <http://www.ohr.wisc.edu/forms/tuit624.pdf>

- Tuition reimbursement form approved by supervisor and submitted to department chair/director  
Date submitted: [Click here to enter a date.](#)
- Tuition reimbursement form approved by department chair/director and submitted to Assistant Dean for HR  
Date submitted: [Click here to enter a date.](#)
- Tuition reimbursement form approved by Assistant Dean for HR and submitted to APO  
Date submitted: [Click here to enter a date.](#)
- Tuition reimbursement approved by APO  
Date approved: [Click here to enter a date.](#)  
Authorized amount: [Click here to enter text.](#)  
Notes: [Click here to enter text.](#)
- not applicable



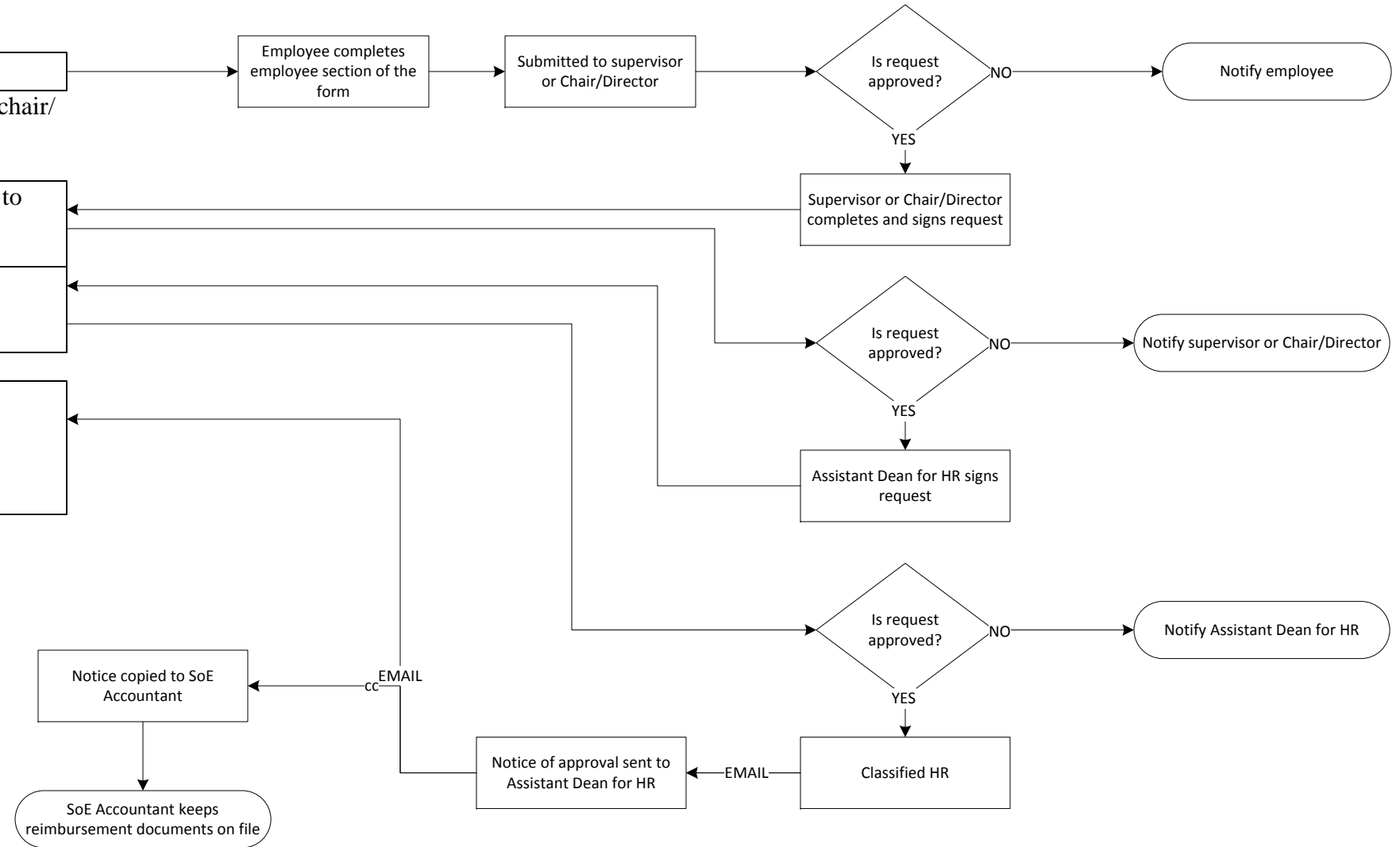


Tuition Reimbursement Request – Classified

Tuition Reimbursement Request – Classified Staff

Tuition reimbursement requires prior approval from employee’s supervisor, department chair/director, division dean/director, and Classified HR.

- Classified: <http://www.ohr.wisc.edu/Forms/requestforreimbursement.pdf>
- Tuition reimbursement form approved by supervisor and submitted to department chair/director  
Date submitted: [Click here to enter a date.](#)
  - Tuition reimbursement form approved by department chair/director and submitted to Assistant Dean for HR  
Date submitted: [Click here to enter a date.](#)
  - Tuition reimbursement form approved by Assistant Dean for HR and submitted to Classified HR  
Date submitted: [Click here to enter a date.](#)
  - Tuition reimbursement approved by Classified HR  
Date approved: [Click here to enter a date.](#)  
Authorized amount: [Click here to enter text.](#)  
Notes: [Click here to enter text.](#)
  - not applicable



Campus Training Opportunities

Campus Training Opportunities

See the UW Office of Human Resources website for upcoming training opportunities: <https://www.ohrd.wisc.edu/home/>



Campus Directory

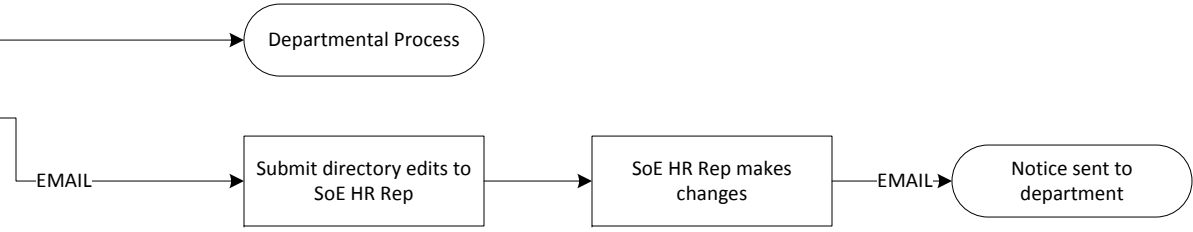
Campus Directory (Searchable wisc.edu)

Employee information appears in the campus directory automatically after SoE Business Office enters the employee in HRS.

Changes to personal directory information can be made by the employee in MyUW. (Work Record - Personal Information)

- Employee has checked the wisc.edu directory to verify that the information is accurate

Changes to appointment related information in the directory must be changed by the SoE HR Rep. Please contact your SoE HR Rep to make changes to work address, work email, or work phone as listed in the wisc.edu directory.



## Transcript Printing

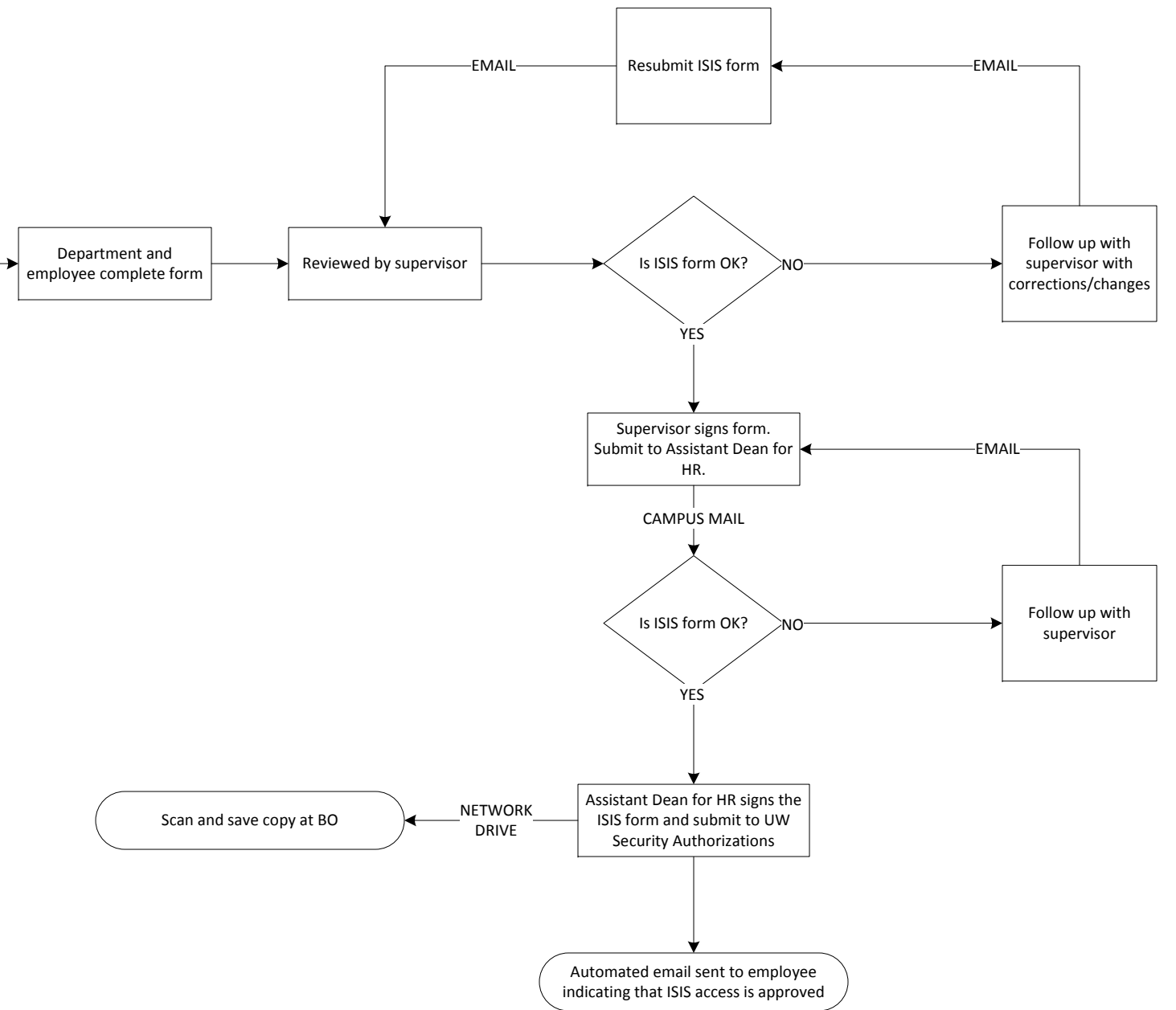
### Transcript Printing

If the new employee will need to print transcripts, he/she will need ISIS authorization.

ISIS: [http://www.doit.wisc.edu/restricted/authorization/forms/isis\\_auth.pdf](http://www.doit.wisc.edu/restricted/authorization/forms/isis_auth.pdf)

**\*\*NOTE:** Be sure to list the printer IP address on this form to allow for transcript printing. Consult with your primary IT consultant if you have questions about this.

- ISIS authorization submitted  
Date submitted: [Click here to enter a date.](#)
- not applicable



Wisclist Information (Page 12, starting at line 39)

Wisclist Information

The SoE Business Office will assign new employees to school-wide Wisclists based on appointment type.

Employee reviewed by  
SoE HR Rep and Business  
Office

The list below is for department/unit reference only to ensure that new employees are added to locally controlled Wisclists.

List	Added	Date
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.
Click here to enter text.	<input type="checkbox"/>	Click here to enter a date.

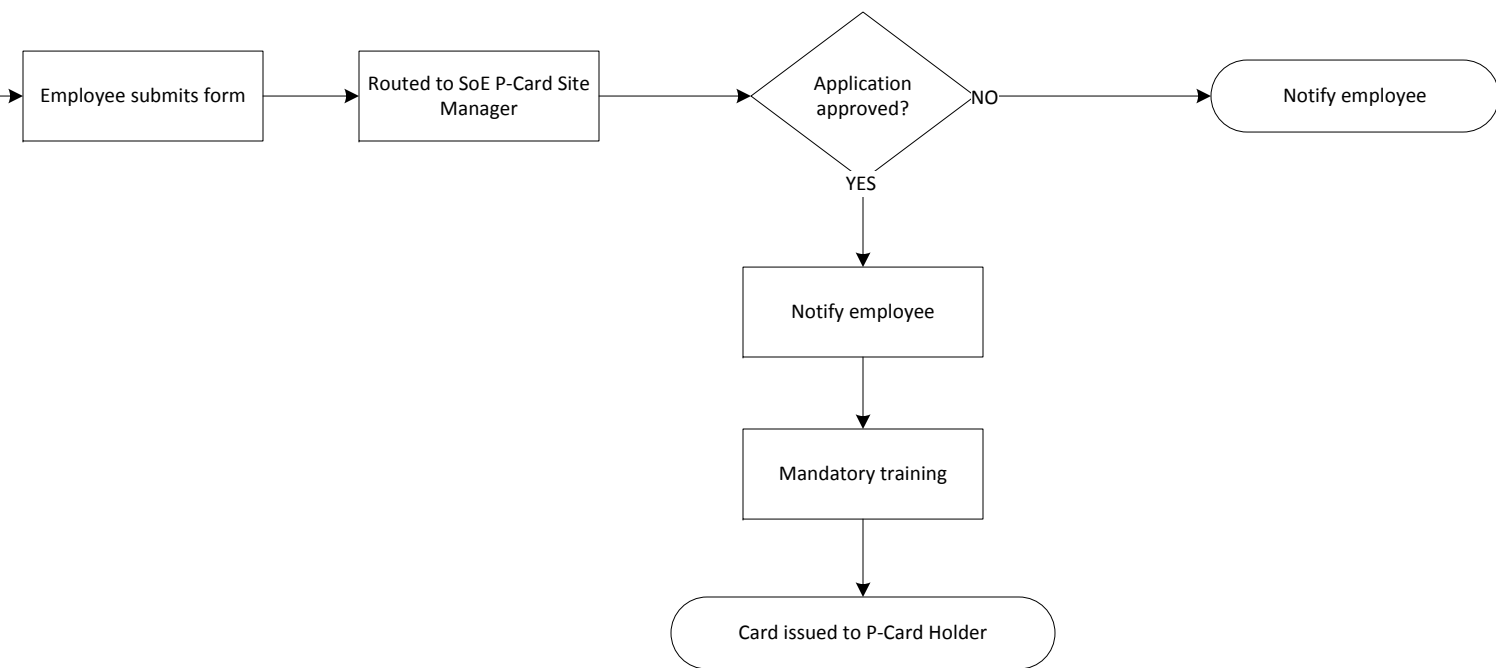
Departmental Process

P-Card Holder

P-Card Holder

Here is the link to apply for a p-card for new employees: <https://wneta.bussvc.wisc.edu/CardApp/CHApply.aspx>

- P-Card application submitted  
Date submitted: [Click here to enter a date.](#)
- This employee does not have a P-card



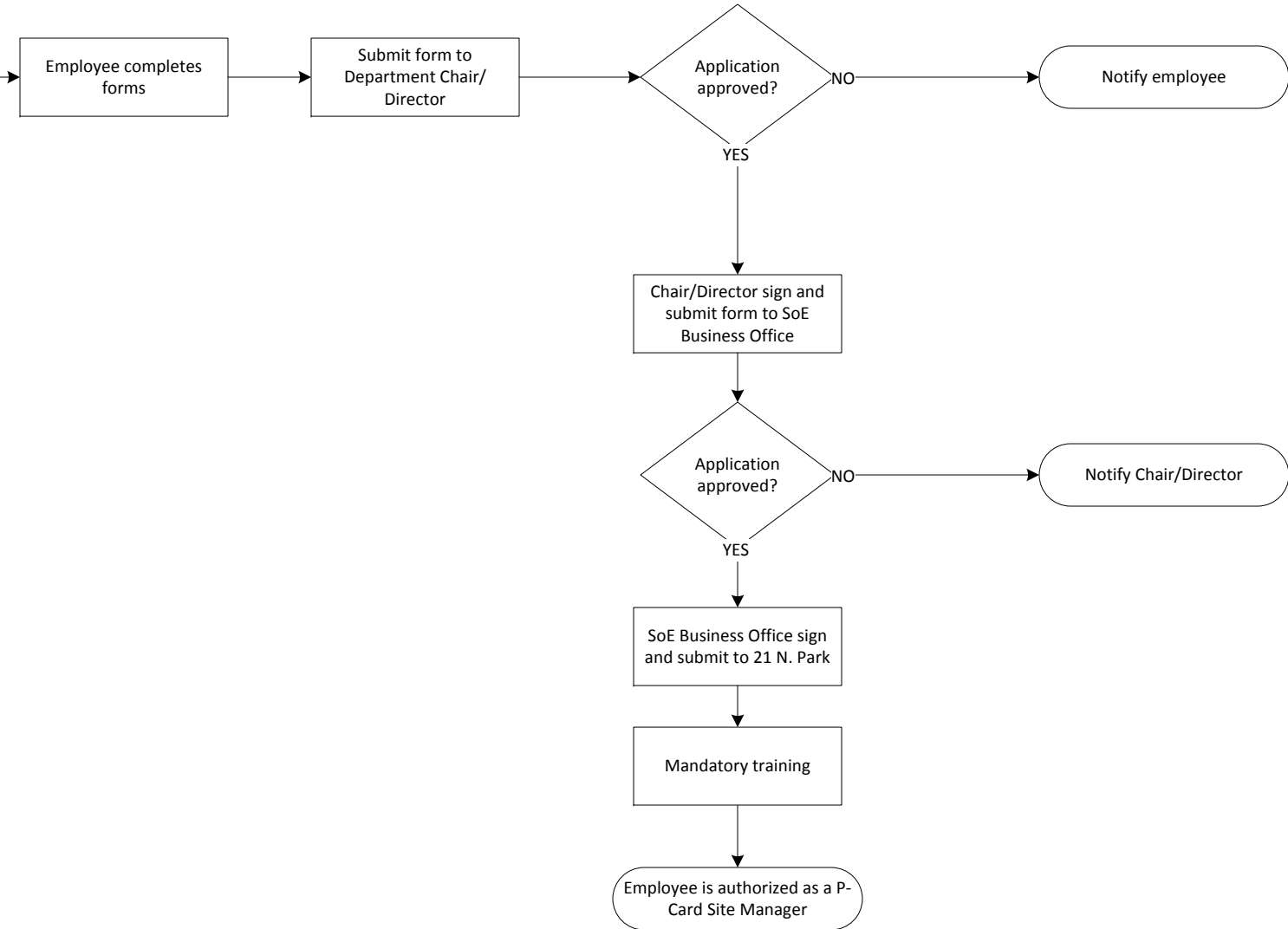
## P-Card Site Manager

### P-Card Site Manager

When a new employee needs to be the site manager they need to complete the site manager form located at the bottom of this website:

<http://www.bussvc.wisc.edu/acct/purchcd/siteman.html>

- P-Card Site Manager application submitted  
Date submitted: [Click here to enter a date.](#)
- This employee is not a P-Card Site Manager



## MDS

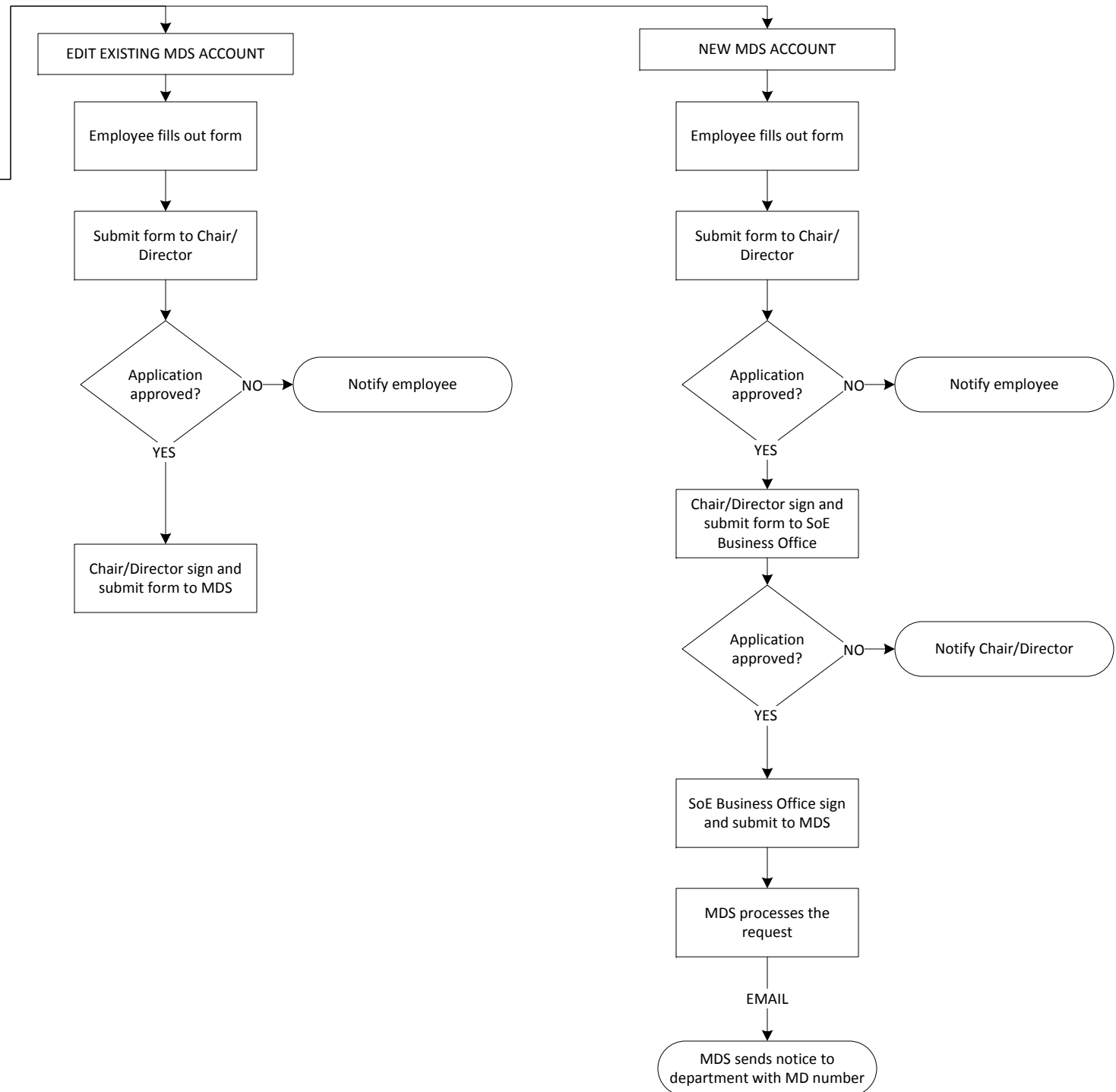
### MDS Authorization

This is for an employee that will serve as the primary MDS account contact or primary MDS financial contact for the department's MDS account.

To create a MDS new account or make changes to an existing one, use this form:

<http://www.bussvc.wisc.edu/mds/links/AcctForm.pdf>

- MDS form submitted  
Date submitted: [Click here to enter a date.](#)
- This employee will not have MDS authorization





Grant Transfers

Grant Transfers

This item is for new employees that are PI's on grants administered by SoE (including WCER).

- This employee is a PI on grants that will be administered by SoE  
Please follow up with the Assistant Dean for Grants & Contracts with details regarding these grants.
- This employee is not a PI

Notice sent to SoE Assistant Dean for  
Grants and Contracts